Regular Meeting
Tuesday, December 14, 2021 6:00 PM

Dr. Matthew Prophet Education Center - Board Auditorium
501 N. Dixon St
Portland, OR 97227

Agenda

1. 6:00 pm - Opening
2. 6:05 pm - Recognition of Grant Girls Soccer Team
3. 6:15 pm - Board Member Declarations to be considered for Board Leadership
4. 6:25 pm - Consent Agenda: Resolutions 6409 through 6416 Vote- Public Comment Accepted
   - 4.(a) Resolution 6409: Adoption of the Index to the Minutes
   - 4.(b) Resolution 6410: Authorization for Off-Campus Activities
   - 4.(c) Resolution 6411: Expenditure Contracts
   - 4.(d) Resolution 6412: Revenue Contracts
   - 4.(e) Resolution 6413: Approval of the Head Start Policy Council Recommendation
   - 4.(f) Resolution 6414: Approval of the Head Start Policy Council Recommendation
   - 4.(g) Resolution 6415: Approval of the Head Start Policy Council Recommendation
   - 4.(h) Resolution 6416: Approval of the Head Start Policy Council Recommendation
5. 6:30 pm - Student and Public Comment
6. 7:10 pm - Student Representative's Report
7. 7:30 pm - Board Committee and Conference Reports
8. 7:40 pm - Long-Range Facilities Plan (Resolution 6421) *Vote - Public Comment Accepted*
9. 7:55 pm - Southeast Guiding Coalition Recommendation and Feedback
10. 8:25 pm - Annual Comprehensive Financial Report Presentation (Resolution 6422) *Vote - Public Comment Accepted*
11. 8:45 pm - First Reading of Policies and Policy Rescissions
    - 11.(a) Workplace Harassment Policy 5.10.060-P
    - 11.(b) Policy Rescissions:
      - Definitions 1.10.020-P
      - Teacher Membership on Committees 2.40.010-P
12. 8:50 pm - Second Reading of Policies *Vote - Public Comment Accepted*
    - 12.(a) Resolution 6417: Resolution to Adopt Revised PPS Cafeteria Plan Policy 5.10.090-P
    - 12.(b) Resolution 6418: Resolution to Adopt Revised Vacation and District Holidays for Non-represented Employees Policy 5.60.031-P
    - 12.(c) Resolution 6419: Resolution to Adopt Revised Administrative Employees' Terms of Employment Policy 5.60.010-P
    - 12.(d) Resolution 6420: Resolution to Rescind Board Policies
13. 9:00 pm - Other Business / Committee Referrals
14. 9:05 pm - Adjourn

PORTLAND PUBLIC SCHOOLS

BOARD OF EDUCATION

Index to the Minutes

(Draft for Approval)

Regular Meeting
November 16, 2021

Attendance

Present: Chair DePass; Vice-Chair Scott; Directors Brim-Edwards, Greene, Hollands, Kohnstamm, and Lowery; Student Representative Weinberg

Absent: None

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Actions Taken..... 02

RESOLUTIONS

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6406	Expenditure Contracts	04
6407	Revenue Contracts	07
6408	Authorizing Off-Campus Travel	08

Actions Taken

- **Consent Agenda – Resolutions 6405 through 6408**

  Director Kohnstamm moved and Director DePass seconded the motion to approve the Consent Agenda, including Resolutions 6405 through 6408. The motion was put to a voice vote and Passed (7 yes, 0 no) with Student Representative Weinberg voting yes (unofficial)

  Director Julia Brim-Edwards: Yes, Director Michelle DePass: Yes, Director Greene: Yes, Director Hollands: Yes, Director Amy Kohnstamm: Yes, Director Eilidh Lowery: Yes, Director Andrew Scott: Yes; Student Representative Weinberg: Yes (Unofficial)

- **Oregon School Board Nomination Support - Position 17 of the Oregon School Board Association (OSBA) Legislative Policy Committee**

  Support for the nomination of Elizabeth Durant for position 17 of the Oregon School Board Association (OSBA) Legislative Policy Committee was put to a voice vote and passed (7 yes, 0 no)

  Director Julia Brim-Edwards: Yes, Director Michelle DePass: Yes, Director Greene: Yes, Director Hollands: Yes, Director Amy Kohnstamm: Yes, Director Eilidh Lowery: Yes, Director Andrew Scott: Yes

- **Oregon School Board Nomination Support - Position 18 on the Oregon School Board Association (OSBA) Board of Directors**

  Support for the nomination of Kris Howatt for Position 18 on the Oregon School Board Association (OSBA) Board of Directors was put to a voice vote and passed (6 yes, 0 no, 1 abstain)

  Director Julia Brim-Edwards: Yes, Director Michelle DePass: Yes, Director Greene: Yes, Director Hollands: Yes, Director Amy Kohnstamm: Abstain, Director Eilidh Lowery: Yes, Director Andrew Scott: Yes

- **Oregon School Board Nomination Support - Position 18 of the Oregon School Board Association (OSBA) Legislative Policy Committee**

  Support for the nomination of Jessica Arzate for Position 18 on the Oregon School Board Association (OSBA) Legislative Policy Committee was put to a voice vote and passed (7 yes, 0 no)

  Director Julia Brim-Edwards: Yes, Director Michelle DePass: Yes, Director Greene: Yes, Director Hollands: Yes, Director Amy Kohnstamm: Yes, Director Eilidh Lowery: Yes, Director Andrew Scott: Yes

RESOLUTION No. 6405

The Following Index to the Minutes are offered for Adoption

- 10/26/2021 – Regular Meeting
- 11/02/2021 – Regular Meeting
- 11/09/2021 – Special Meeting

RESOLUTION No. 6406

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

RECITAL

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

RESOLUTION

The Superintendent recommends that the Board approve these contracts. The Board accepts this recommendation and by this resolution authorizes the Deputy Clerk to enter into the following agreements.

NEW CONTRACTS

Contractor	Contract Term	Contract Type	Description of Services	Contract Amount	Responsible Admin, Funding Source	Certified Business
Oh Planning & Design, Architecture	11/17/21 through 12/31/22 Option to renew for up to four additional one-year terms through 12/31/26	Architecture ARCH 90907	Glencoe re-roof design. Request for Proposals 2021-3004	$650,949	C. Hertz Fund 458 Dept. 5511 Project DS017	WBE
Applied Technical Systems, Inc.	11/17/21 through 11/16/22 Option to renew for up to four additional one-year terms through 11/16/26	Indefinite Deliverable/Indefinite Quantity ID/IQ 90920	Job order contract for classroom backbone infrastructure modernization (CBIM), which will provide additional bandwidth and connectivity throughout classrooms and common areas in schools district-wide. Request for Proposals 2021-3014	Not to Exceed $16,000,000	C. Hertz Funding Source Varies	No
M2 Integration, LLC	11/17/21 through 11/16/22 Option to renew for up to four additional one-year terms through 11/16/26	Indefinite Deliverable/Indefinite Quantity ID/IQ 90911	Job order contract for classroom backbone infrastructure modernization (CBIM), which will provide additional bandwidth and connectivity throughout classrooms and common areas in schools district-wide. Request for Proposals 2021-3014	Not to Exceed $16,000,000	C. Hertz Funding Source Varies	No
Hyperion Communications, LLC	11/17/21 through 11/16/22 Option to renew for up to four additional one-year terms through 11/16/26	Indefinite Deliverable/Indefinite Quantity ID/IQ 90927	Job order contract for classroom backbone infrastructure modernization (CBIM), which will provide additional bandwidth and connectivity throughout classrooms and common areas in schools district-wide. Request for Proposals 2021-3014	Not to Exceed $16,000,000	C. Hertz Funding Source Varies	No

Empower Digital Solutions, Inc.	11/17/21 through 11/16/22 Option to renew for up to four additional one-year terms through 11/16/26	Indefinite Deliverable/Indefinite Quantity ID/IQ 90915	Job order contract for classroom backbone infrastructure modernization (CBIM), which will provide additional bandwidth and connectivity throughout classrooms and common areas in schools district-wide. Request for Proposals 2021-3014	Not to Exceed $16,000,000	C. Hertz Funding Source Varies	ESB
Sazan Environmental Services	11/17/21 through 6/30/22	Personal Services PS 90943	Develop and implement Facilities Maintenance Plan for the District. Request for Proposals 2021-3010	$254,605	C. Hertz Fund 101 Dept. 5592	No
Xcalibur, Inc.	11/17/21 through 6/30/24 Option to renew for one additional one-year term through 6/30/25	Personal Services PS 90811	Conduct a research and evaluation study to assess GEAR UP program outcomes and impacts using a community-based evaluation methodology. Request for Proposals 2021-2967	$327,000	S. Bird Fund 205 Dept. 5438 Grant G1827	No
Skyward Construction, LLC	11/17/21 through 7/29/22	Construction C 90886	BESC Security Fencing & Gate Upgrades Invitation to Bid – Construction 2021-3009	$239,567	C. Hertz Fund 404 Dept. 5597 Project X0207	No
Studio Petretti Architecture	11/17/21 through 12/31/22 Option to renew for up to four additional one-year terms through 12/31/26	Architecture ARCH 90892	West Sylvan Partial Re-Roof Design Request for Proposals 2021-3004	$406,073	C. Hertz Fund 458 Dept. 5511 Project DS017	WBE
Studio Petretti Architecture	11/17/21 through 12/31/22 Option to renew for up to four additional one-year terms through 12/31/26	Architecture ARCH 90893	Ainsworth Partial Re-Roof Design Request for Proposals 2021-3004	$202,039	C. Hertz Fund 458 Dept. 5511 Project DS017	WBE

*A Certified Business is a for-profit business certified as a Minority-Owned Businesses (MBE), Women-Owned Businesses (WBE), Emerging Small Businesses (ESB), and/or Service-Disabled Veteran Businesses (SDV) by the State of Oregon Certification Office for Business Inclusion and Diversity.

NEW COOPERATIVE PURCHASING AGREEMENTS

NO NEW COOPERATIVE AGREEMENTS

NEW INTERGOVERNMENTAL AGREEMENTS ("IGAs")

Contractor	Contract Term	Contract Type	Description of Services	Contract Amount	Responsible Administrator, Funding Source
Reynolds School District	7/1/21 through 6/30/22	Intergovernmental Agreement IGA 90905	Regional services to eligible individuals with Autism Spectrum Disorder.	$238,700	S. Bird Fund 205 Dept. 5433 Grant G2070

AMENDMENTS TO EXISTING CONTRACTS

Contractor	Contract Term	Contract Type	Description of Services	Contract Amount	Responsible Admin, Funding Source	Certified Business
Portland Youth Builders	11/17/21 through 6/30/22 Option to renew for four additional one-year periods through 6/30/26	Personal Services PS 90297 Amendment 1	SIA, Equity, and ESSER allocations for contracted alternative school serving PPS students. Request for Proposals 2020-2894	Amend Amount $37,840 New Max Amount $430,820	S. Bird Funding Source Varies	No
Fora Health, Inc.	11/17/21 through 6/30/22 Option to renew for four additional one-year periods through 6/30/26	Personal Services PS 90293 Amendment 1	SIA, Equity, and ESSER allocations for contracted alternative school serving PPS students. Request for Proposals 2020-2894	Amend Amount $35,567 New Max Amount $203,987	S. Bird Funding Source Varies	No
Youth Progress Association	11/17/21 through 6/30/22 Option to renew for four additional one-year periods through 6/30/26	Intergovernmental Agreement IGA 90292 Amendment 1	SIA, Equity, and ESSER allocations for contracted alternative school serving PPS students. Request for Proposals 2020-2894	Amend Amount $28,529 New Max Amount $196,949	S. Bird Funding Source Varies	Non-profit
Education Elements	11/17/21 through 7/1/22	Personal Services PS 89648 Amendment 1	Middle School Redesign Phase 2 Support. Request for Proposals 2020-2764	Amend Amount $196,100 New Max Amount $296,100	S. Bird Fund 101 Dept. 5445	No

RESOLUTION No. 6407

Revenue Contracts that Exceed $150,000 Limit for Delegation of Authority

RECITAL

Portland Public Schools ("District") Public Contracting Rules PPS-45-0200 ("Authority to Approve District Contracts; Delegation of Authority to Superintendent") requires the Board of Education ("Board") to enter into and approve all contracts, except as otherwise expressly authorized. Contracts exceeding $150,000 per contractor are listed below.

RESOLUTION

The Superintendent recommends that the Board approve these contracts. The Board accepts this recommendation and by this resolution authorizes the Deputy Clerk to enter into the following agreements.

NEW REVENUE CONTRACTS

No New Revenue Contracts

NEW INTERGOVERNMENTAL AGREEMENTS / REVENUE ("IGA/Rs")

Contractor	Contract Term	Contract Type	Description of Services	Contract Amount	Responsible Administrator, Funding Source
Portland Public Schools	8/24/21 through 6/30/22	Intergovernmental Agreement / Revenue IGA/R 90924	Columbia Regional Program will provide school age classroom services for Deaf/Hard of Hearing regionally eligible students.	$582,2870	S. Bird Fund 299 Dept. 5422 Grant S0031

AMENDMENTS TO EXISTING REVENUE CONTRACTS

Contractor	Contract Term	Contract Type	Description of Services	Amendment Amount, Contract Amount	Responsible Administrator, Funding Source
State of Oregon	7/1/14 – 6/30/23	Intergovernmental Agreement / Revenue IGA/R 64777 Amendment 5	Funding for Columbia Regional Program to provide services to regionally eligible students for two additional years.	$17,782,298 $61,232,818	S. Bird Funding Source Varies

RESOLUTION No. 6408

Authorization for Off-Campus Activities

RECITAL

Portland Public Schools ("District") Policy 6.50.010-P ("Off-Campus Activities") requires the Board of Education ("Board") consent to student out-of-state travel.

RESOLUTION

The Board has reviewed the request for out-of-state travel. All required documents have been submitted to the Risk Management Department. The Superintendent recommends that the Board consent to the student out-of-state travel for the below request:

AUTHORIZATION FOR OFF-CAMPUS ACTIVITIES

Date(s)	School, Course, and Number of Students	Purpose of Travel	Travel Destination	Estimated Cost per student
11/19-11/21/21	Cleveland HS band; 20 students	Honor Band event	Seattle, WA	$386
11/19-11/21/21	Franklin HS band; 11 students	Honor Band event	Seattle, WA	$406
11/19-11/21/21	Grant HS band; 10 students	Honor Band event	Seattle, WA	$526.39
12/16-12/22/21	Grant HS men's basketball; 12 students	Bishop Gorman Tournament	Las Vegas, NV	$800
3/18-3/24/22	Lincoln HS baseball team; 18 students	Baseball tournament	Phoenix, AZ	$1,750

RESOLUTION No. 6409

The Following Index to the Minutes are offered for Adoption

- November 16, 2021 – Regular Meeting

RESOLUTION No. 6410

Authorization for Off-Campus Activities

RECITAL

Portland Public Schools ("District") Policy 6.50.010-P ("Off-Campus Activities") requires the Board of Education ("Board") consent to student out-of-state travel.

RESOLUTION

The Board has reviewed the request for out-of-state travel. All required documents have been submitted to the Risk Management Department. The Superintendent recommends that the Board consent to the student out-of-state travel for the below request:

AUTHORIZATION FOR OFF-CAMPUS ACTIVITIES

Date(s)	School, Course, and Number of Students	Purpose of Travel	Travel Destination	Estimated Cost
4/8 – 4/11/22	Wells HS Band, 45 students	College visit, band tour, work with soundtrack team @ Disneyland	Disneyland, CA	$975 per person
12/14 – 12/19/21	Roosevelt HS Women's Varsity Basketball, 15 students	Tournament, team building, college access workshops	Orlando, FL	$1600 per person

RESOLUTION No. 6411

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

RECITAL

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

RESOLUTION

The Superintendent recommends that the Board approve these contracts. The Board accepts this recommendation and by this resolution authorizes the Deputy Clerk to enter into the following agreements.

NEW CONTRACTS

Contractor	Contract Term	Contract Type	Description of Services	Contract Amount	Responsible Admin, Funding Source	Certified Business
Advanced Technology Group, Inc.	12/15/21 through 8/6/24	Flexible Services Contractor Pool FSCP 90733	Flexible Services Contractor Pool – Painting. District-wide use, on-call painting services. Request for Proposals 2021-2963	Not to Exceed $3,000,000	C. Hertz Funding Source Varies	No
TeleTeachers, Inc.	12/15/21 through 6/13/22	Personal Services PS 90955	Provide up to four special education teachers to provide home instruction for PPS students. Direct Negotiation – Unique Knowledge and/or Expertise PPS-46-0525(4)	$268,244	S. Bird Fund 101 Dept. 5414	No
Mackenzie	12/15/21 through 12/31/22	Engineering ENG 91004	Pre-design services, master planning, conditional use review, field design, and permitting for Jackson School. Request for Proposals 2021-3002	$345,322	C. Hertz Fund 445 Dept. 5597 Project K0242	No
Stoner Electric Group	12/15/21 through 11/16/22 Option to renew for up to four additional one-year terms through 11/16/26	Indefinite Deliverable/Indefinite Quantity ID/IQ 90941	Job order contract for classroom backbone infrastructure modernization (CBIM), which will provide additional bandwidth and connectivity throughout classrooms and common areas in schools district-wide. Request for Proposals 2021-3014	Not to Exceed $16,000,000	C. Hertz Funding Source Varies	No
Harder Mechanical Contractors, Inc.	12/15/21 through 12/1/24 Option to renew for one additional two-year term through 12/1/26	Services S 91036	HVAC/boiler work on an as-needed basis for all District buildings. Request for Proposals 2021-3012	Not to Exceed $3,750,000	C. Hertz Fund 101 Dept. 5593	No
MacDonald-Miller Facility Solutions, Inc.	12/15/21 through 12/1/24	Services S 91037	HVAC/boiler work on an as-needed basis for all District buildings. Request for Proposals 2021-3012	Not to Exceed $3,750,000	C. Hertz Fund 101 Dept. 5593	No

	Option to renew for one additional two-year term through 12/1/26					

*A Certified Business is a for-profit business certified as a Minority-Owned Businesses (MBE), Women-Owned Businesses (WBE), Emerging Small Businesses (ESB), and/or Service-Disabled Veteran Businesses (SDV) by the State of Oregon Certification Office for Business Inclusion and Diversity.

NEW COOPERATIVE PURCHASING AGREEMENTS

Contractor	Contract Term, Renewal Options	Administering Contracting Agency	Description of Goods or Services	Estimated Spend During Contract Term	Responsible Administrator, Funding Source	Certified Business
PBS Engineering & Environmental	12/15/21 through 12/31/25	Multnomah County	Environmental consulting services on an as-needed basis.	$1,000,000	C. Hertz Funding Source Varies	No

NEW INTERGOVERNMENTAL AGREEMENTS ("IGAs")

No New IGAs

AMENDMENTS TO EXISTING CONTRACTS

No New Amendments

RESOLUTION No. 6412

Revenue Contracts that Exceed $150,000 Limit for Delegation of Authority

RECITAL

Portland Public Schools ("District") Public Contracting Rules PPS-45-0200 ("Authority to Approve District Contracts; Delegation of Authority to Superintendent") requires the Board of Education ("Board") to enter into and approve all contracts, except as otherwise expressly authorized. Contracts exceeding $150,000 per contractor are listed below.

RESOLUTION

The Superintendent recommends that the Board approve these contracts. The Board accepts this recommendation and by this resolution authorizes the Deputy Clerk to enter into the following agreements.

NEW REVENUE CONTRACTS

No New Revenue Contracts

NEW INTERGOVERNMENTAL AGREEMENTS / REVENUE ("IGA/Rs")

Contractor	Contract Term	Contract Type	Description of Services	Contract Amount	Responsible Administrator, Funding Source
State of Oregon	7/1/21 through 6/30/23	Intergovernmental Agreement / Revenue IGA/R 90982	Grant from the Youth Development Council to support workforce readiness.	$200,000	S. Bird

AMENDMENTS TO EXISTING REVENUE CONTRACTS

No Amendments to Existing Revenue Contracts

RESOLUTION No. 6413

Approval of Head Start Policy Council Recommendation

RECITALS

A. Federal requirements call for the Governing Board of a Head Start program to approve recommendations for the program.

B. The Board of Directors for Portland Public Schools serves as the Governing Board for the PPS Head Start Program.

C. Portland Public Schools Policy Council recommends the approval of the 2021-2022 PPS Head Start School Readiness Goals. The Head Start approach to school readiness means that children are ready for school**,** families are ready to support their children's learning, and schools are ready for children. Physical, cognitive, social, and emotional development are all essential ingredients of school readiness. Head Start views school readiness as children possessing the skills, knowledge, and attitudes necessary for success in school and for later learning and life. Programs must establish school readiness goals that are appropriate for the ages and development of enrolled children in the following domains: Approaches to Learning, Social and Emotional Development, Language and Literacy, Cognition, and Perceptual, Motor, and Physical Development. Implementing and measuring progress toward school readiness goals helps programs individualize for each child and ensure that children know and can do what is needed to be ready for kindergarten. Head Start respects parents as their children's primary nurturers, teachers, and advocates, and programs are required to consult with parents in establishing school readiness goals. As children transition to kindergarten, Head Start programs and schools should work together to promote school readiness and engage families.

RESOLUTION

The Board of Directors for Portland Public Schools, School District No. 1J, Multnomah County, Oregon, approves the Head Start Policy Council recommendations as stated above.

School Readiness Goals 2021-22

Goal: **To improve academic achievement and strengthen services for all children in order to ensure school readiness and successful transitions to kindergarten and beyond.**

Comprehensive Services Supporting All School Readiness Goals

Comprehensive Services will be provided for in the following service areas:

- Education
- Disabilities
- Health (Nutrition, Mental Health and Child Health and Safety)
- Family/Community Partnerships

✪ = SIP Goals | *Included in PPS Head Start School Improvement Plan/Operations Manual. Priority goals to emphasize teaching, learning, family engagement and professional development.*
☆ = Focus Goals | *Secondary goals to consider for teaching and learning.*

Social & Emotional Development

HSELOF Domain: Social & Emotional Development		**Measured by DRDP**	**Fall**	**Winter**	**Spring**	**Achievement Goal**
Domain Element: ✪ **Social Relationships**	SRG 1: Children will demonstrate healthy relationships and interactions with adults and peers.	SED-3 SED-4				EoY Outcome Benchmark: 95%
Domain Element: ✪ **Self-Regulation**	SRG 2: Children will increase their ability to recognize and regulate emotions, attention, impulses, and behavior.	SED-1 SED-2 ALT-REG-2				EoY Outcome Benchmark: 95%

Perceptual, Motor, and Physical Development

HSELOF Domain: Physical Development & Health		**Measured by DRDP**	**Fall**	**Winter**	**Spring**	**Achievement Goal**
Domain Element: ☆ Gross Motor Skills	SRG 3: Children will increase the control of large muscles for movement, navigation, and balance, developing motor coordination and skill in using objects for a range of physical activities, such as pulling, throwing, catching, kicking, bouncing or hitting balls, and riding a tricycle.	PD-HLTH-2 PD-HLTH-3 PD-HLTH-9				EoY Outcome Benchmark: 95%

Language and Literacy

HSELOF Domain: Language Development		Measured by DRDP	Fall	Winter	Spring	Achievement Goal
Domain Element: ✪ **Expressive Language**	SRG 4: Increase the quantity, and quality of children's receptive and expressive language. Children will demonstrate the ability to use language to engage in communication, conversations, and storytelling.	LLD-1 LLD-2				EoY Outcome Benchmark: 95%
HSELOF Domain: Literacy Knowledge & Skills		**Measured by DRDP**	**Fall**	**Winter**	**Spring**	**Achievement Goal**
Domain Element: ✪ **Phonological Awareness**	SRG 5: Children will demonstrate awareness that language can be broken into words, syllables, and smaller pieces of sound.	LLD-8				EoY Outcome Benchmark: 95%
Domain Element: ✪ **Alphabet Knowledge**	SRG 6: Children will demonstrate alphabet knowledge by understanding the names and sounds associated with letters.	LLD-9				EoY Outcome Benchmark: 95%
Domain Element: ☆ Early Writing	SRG 7: Children transitioning to kindergarten will demonstrate familiarity with writing implements, conventions, and emerging skills to communicate through written representations, symbols, and letters.	LLD-10				EoY Outcome Benchmark: 95%
HSELOF Domain: English Language Development		**Measured by DRDP**	**Fall**	**Winter**	**Spring**	**Achievement Goal**
Domain Element: ✪ **Receptive and Expressive English Language Skills**	SRG 8: English Language Learners will demonstrate an increase in the quantity and quality of their receptive and expressive use of English while maintaining their home language.	ELD-1 ELD-2				EoY Outcome Benchmark: 95%

Cognition

HSELOF Domain: Cognition		Measured by DRDP	Fall	Winter	Spring	Achievement Goal
Domain Element: ☆ Reasoning & Problem Solving	SRG 9: Children will demonstrate the ability to recognize, understand, and analyze a problem and draw on knowledge or experience to seek solutions to a problem.	COG-8 COG-9 COG-10				EoY Outcome Benchmark: 95%
HSELOF Domain: Mathematic Development		**Measured by DRDP**	**Fall**	**Winter**	**Spring**	**Achievement Goal**
Domain Element: ✪ **Number Concepts and Quantities**	SRG 10: Children will understand that numbers represent quantities using one-to-one counting to determine quantity.	COG-3 COG-4				EoY Outcome Benchmark: 95%
Domain Element: ✪ **Patterns**	SRG 11: Children will recognize patterns, sequencing, and critical thinking skills necessary to predict and classify objects in a pattern.	COG-2 COG-6 COG7				EoY Outcome Benchmark: 95%

Approaches to Learning

HSELOF Domain: Approaches to Learning		Measured by DRDP	Fall	Winter	Spring	Achievement Goal
Domain Element: ☆ Persistence and Attentiveness	SRG 12: Children will demonstrate the ability to begin and finish activities with persistence and attention.	ALT-REG-4 ALT-REG-6				EoY Outcome Benchmark: 95%

PORTLAND PUBLIC SCHOOLS
Head Start Program
4800 NE 74th Avenue
Portland,OR 97218
503-916-5724• Fax: 503-916-2670

HEAD START PROGRAM

Kathy Schuknecht
Regional Program Manager
Office of Head Start

Subject: PPS Head Start 2021-2022 School Readiness Goals

Dear Ms. Kathy Schuknecht,

Portland Public Schools Head Start Governing Board has approved PPS Head Start's 2021-2022 School Readiness Goals.

The signature below is confirmation the Head Start Governing Board has approved this request.

Thank you.

Head Start Director — Date 11/29/2021

Governing Board Chair — Date

Portland Public Schools is an equal opportunity educator and employer.

PORTLAND PUBLIC SCHOOLS
Head Start Program
4800 NE 74th Avenue• Portland,OR 97218
503-916--5724• Fax: 503-916--2670

Kathy Schuknecht
Regional Program Manager
Office of Head Start

Subject: 2021-2022 School Readiness Goals

Dear Ms. Kathy Schuknecht,

Portland Public Schools Head Start Policy Council has approved the program's 2021-2022 School Readiness Goals.

The signature below is confirmation the Head Start Policy Council has approved this request.

Thank you,

Head Start Director — Date 11/29/2021

Policy Council Chair — Date 11/29/2021

Portland Public Schools is an equal opportunity educator and employer.

PORTLAND PUBLIC SCHOOLS
OFFICE OF Head Start/Early Learners
501 North Dixon Street / Portland, OR 97227
Telephone: (503) 916-5724

Date: December 3, 2021

To: PPS School Board

From: Dr. Emily Glasgow, Interim Senior Director of PK-5 Core Academics
Dr. Robert D. Cantwell, Principal/Director of Head Start

Subject: Head Start Action and Informational Items

BACKGROUND

A. Federal requirements call for the Governing Board of Head Starts to approve recommendations and reports for the program.

B. The Board of Directors for Portland Public Schools serves as the Governing Board for PPS Head Start.

1. 2020-2021 Program Annual Report

The Head Start Program Performance Standards provide requirements and procedures for the Annual Report. The Annual Report includes yearlong information regarding Head Start program data. It is used as a community resource and contains information from the PIR. Program budget information is also shared in the annual report. PPS Head Start Parent Policy Council approved the 2020-2021 Program Annual Report on November 9, 2021. A Board Letter of Approval is requested.

2. 2021-2022 PPS Head Start Self-Assessment Timeline

Board approval of the annual Self-Assessment Timeline is required. The annual Self-Assessment is a central tenet of continuous quality improvement for Head Start programs. The goal of the Self-Assessment is to meet Head Start Program Performance Standards and move toward program excellence in serving children and families. The process provides programs the means to regularly assess their own management systems and program operations in order to continually strengthen the program and the services and supports delivered to children and families. PPS Head Start Parent Policy Council approved the 2021-2022 Self-Assessment Timeline on November 9, 2021. A Board Letter of Approval is requested.

3. 2021-2022 PPS Head Start School Readiness Goals

The Head Start approach to school readiness means that children are ready for school, families are ready to support their children's learning, and schools are ready for children. Physical, cognitive, social, and emotional development are all essential ingredients of school readiness. Head Start views school readiness as children possessing the skills, knowledge, and attitudes necessary for success in school and for later learning and life. Programs must establish school

readiness goals that are appropriate for the ages and development of enrolled children in the following domains: Approaches to Learning, Social and Emotional Development, Language and Literacy, Cognition, and Perceptual, Motor, and Physical Development. Implementing and measuring progress toward school readiness goals helps programs individualize for each child and ensure that children know and can do what is needed to be ready for kindergarten. Head Start respects parents as their children's primary nurturers, teachers, and advocates, and programs are required to consult with parents in establishing school readiness goals. As children transition to kindergarten, Head Start programs and schools should work together to promote school readiness and engage families. PPS Head Start Parent Policy Council approved the 2021-2022 School Readiness Goals on November 9, 2021. A Board Letter of Approval is requested.

4. PPS Head Start Lice Policy

Board approval of new policies is required. According to Head Start Program Performance Standard 1302.40(a), A program must provide high-quality health, oral health, mental health, and nutrition services that are developmentally, culturally, and linguistically appropriate and that will support each child's growth and school readiness. The Office of Head Start states that policies should not be established that require staff or children to be nit-free before returning because these policies do not prevent the spread of lice. They needlessly exclude children from care and cause unwarranted and excessive burdens on families. Instead, a prevention and treatment approach should be adopted. PPS Head Start, under the guidance of its program nurses, has developed a procedural flowchart to address the presence of lice. PPS Head Start Parent Policy Council approved the Lice Management Procedures on November 9, 2021. A Board Letter of Approval is requested.

5. 2020-2021 PPS Head Start Program Information Report (PIR)

The annual Program Information Report provides comprehensive data on the services, staff, children, and families served by Head Start. All grantees are required to submit a PIR each year. The PIR is an important source of descriptive and service data for the Head Start community, their partners, Congress, and for the general public. PIR data is compiled for use at the federal, regional, state, and local levels. The PIR was shared with the PPS Head Start Parent Policy Council on November 9, 2021. This report is for the Governing Body's information only. Governing Body approval is not required.

RELATED POLICIES/BEST PRACTICES

Items listed above are required to be reviewed, updated, and/or approved by the Parent Policy Council and Governing Board.

ANALYSIS OF SITUATION

All items listed above support the high quality, comprehensive wraparound services provided to the children and families attending PPS Head Start.

FISCAL IMPACT

1. There is no known fiscal impact of these items. Continued federal funding of PPS Head Start is dependent upon compliance with Head Start Program Performance Standards, which includes requesting approval of recommendations and reports from the program's governing bodies.

COMMUNITY ENGAGEMENT (IF APPLICABLE)
PPS Head Start Parent Policy Council reviewed, provided input, and approved these actions/documents on November 9, 2021 as noted above and as reflected in the attached meeting minutes.

TIMELINE FOR IMPLEMENTATION / EVALUATION
The timeline for implementation will be the 2021-2022 school year.

BOARD OPTIONS WITH ANALYSIS
Board approval needed.

CONNECTION TO BOARD GOALS
The goal of PPS Head Start is to prepare the city's diverse and resilient young children for successful transitions to kindergarten and beyond by leveraging each child's strengths, building their social competence, and developing school readiness skills.

Portland Public Schools' vision is this: Every student, every teacher, and every school succeeding. The school district's mission is that every student by name is prepared for college, career, and participation as an active community member, regardless of race, income, or zip code. The Board adopted the following four priorities for the 2018-19 school year to move the school district toward the above aspirations:

- Set a clear vision and strategic plan.
- Create equitable opportunities and outcomes for all students.
- Build management accountability systems and structures.
- Allocate budget, funding, and resources focused on improving outcomes for students.

All of the above items support the district's and School Board's vision and priorities.

STAFF RECOMMENDATION
Develop Board resolutions and obtain signature approval of the Board Chair of the attached documents.

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

(Initials)

ATTACHMENTS

A. 2020-2021 Program Annual Report
B. 2020-2021 Program Annual Report Board Resolution
C. 2020-2021 Program Annual Report Governing Body Approval Letter
D. 2020-2021 Program Annual Report Policy Council Approval Letter

E. 2021-2022 Self-Assessment Timeline
F. 2021-2022 Self-Assessment Timeline Board Resolution
G. 2021-2022 Self-Assessment Timeline Governing Body Approval Letter
H. 2021-2022 Self-Assessment Timeline Policy Council Approval Letter
I. 2021-2022 School Readiness Goals
J. 2021-2022 School Readiness Goals Board Resolution
K. 2021-2022 School Readiness Goals Governing Body Approval Letter
L. 2021-2022 School Readiness Goals Policy Council Approval Letter
M. Lice Management Procedures Flow Chart
N. Lice Management Procedures Board Resolution
O. Lice Management Procedures Governing Body Approval Letter
P. Lice Management Procedures Policy Council Approval Letter
Q. 2020-2021 Program Information Report (PIR)
R. 11.9.21 PIR PowerPoint
S. 11.9.21 PPS Head Start Parent Policy Council Meeting Minutes

RESOLUTION No. 6414

Approval of Head Start Policy Council Recommendation

RECITALS

A. Federal requirements call for the Governing Board of a Head Start program to approve recommendations for the program.

B. The Board of Directors for Portland Public Schools serves as the Governing Board for the PPS Head Start Program.

C. Portland Public Schools Policy Council recommends the approval of the PPS Head Start Lice Management Procedures. The Office of Head Start states that policies should not be established that require staff or children to be nit-free before returning because these policies do not prevent the spread of lice. They needlessly exclude children from care and cause unwarranted and excessive burdens on families. Instead, a prevention and treatment approach should be adopted. PPS Head Start, under the guidance of its program nurses, has developed a procedural flowchart to address the presence of lice.

RESOLUTION

The Board of Directors for Portland Public Schools, School District No. 1J, Multnomah County, Oregon, approves the Head Start Policy Council recommendations as stated above.

PORTLAND PUBLIC SCHOOLS
OFFICE OF Head Start/Early Learners
501 North Dixon Street / Portland, OR 97227
Telephone: (503) 916-5724

Date: December 3, 2021

To: PPS School Board

From: Dr. Emily Glasgow, Interim Senior Director of PK-5 Core Academics
Dr. Robert D. Cantwell, Principal/Director of Head Start

Subject: Head Start Action and Informational Items

BACKGROUND

A. Federal requirements call for the Governing Board of Head Starts to approve recommendations and reports for the program.

B. The Board of Directors for Portland Public Schools serves as the Governing Board for PPS Head Start.

1. 2020-2021 Program Annual Report

The Head Start Program Performance Standards provide requirements and procedures for the Annual Report. The Annual Report includes yearlong information regarding Head Start program data. It is used as a community resource and contains information from the PIR. Program budget information is also shared in the annual report. PPS Head Start Parent Policy Council approved the 2020-2021 Program Annual Report on November 9, 2021. A Board Letter of Approval is requested.

2. 2021-2022 PPS Head Start Self-Assessment Timeline

Board approval of the annual Self-Assessment Timeline is required. The annual Self-Assessment is a central tenet of continuous quality improvement for Head Start programs. The goal of the Self-Assessment is to meet Head Start Program Performance Standards and move toward program excellence in serving children and families. The process provides programs the means to regularly assess their own management systems and program operations in order to continually strengthen the program and the services and supports delivered to children and families. PPS Head Start Parent Policy Council approved the 2021-2022 Self-Assessment Timeline on November 9, 2021. A Board Letter of Approval is requested.

3. 2021-2022 PPS Head Start School Readiness Goals

The Head Start approach to school readiness means that children are ready for school, families are ready to support their children's learning, and schools are ready for children. Physical, cognitive, social, and emotional development are all essential ingredients of school readiness. Head Start views school readiness as children possessing the skills, knowledge, and attitudes necessary for success in school and for later learning and life. Programs must establish school

readiness goals that are appropriate for the ages and development of enrolled children in the following domains: Approaches to Learning, Social and Emotional Development, Language and Literacy, Cognition, and Perceptual, Motor, and Physical Development. Implementing and measuring progress toward school readiness goals helps programs individualize for each child and ensure that children know and can do what is needed to be ready for kindergarten. Head Start respects parents as their children's primary nurturers, teachers, and advocates, and programs are required to consult with parents in establishing school readiness goals. As children transition to kindergarten, Head Start programs and schools should work together to promote school readiness and engage families. PPS Head Start Parent Policy Council approved the 2021-2022 School Readiness Goals on November 9, 2021. A Board Letter of Approval is requested.

4. PPS Head Start Lice Policy

Board approval of new policies is required. According to Head Start Program Performance Standard 1302.40(a), A program must provide high-quality health, oral health, mental health, and nutrition services that are developmentally, culturally, and linguistically appropriate and that will support each child's growth and school readiness. The Office of Head Start states that policies should not be established that require staff or children to be nit-free before returning because these policies do not prevent the spread of lice. They needlessly exclude children from care and cause unwarranted and excessive burdens on families. Instead, a prevention and treatment approach should be adopted. PPS Head Start, under the guidance of its program nurses, has developed a procedural flowchart to address the presence of lice. PPS Head Start Parent Policy Council approved the Lice Management Procedures on November 9, 2021. A Board Letter of Approval is requested.

5. 2020-2021 PPS Head Start Program Information Report (PIR)

The annual Program Information Report provides comprehensive data on the services, staff, children, and families served by Head Start. All grantees are required to submit a PIR each year. The PIR is an important source of descriptive and service data for the Head Start community, their partners, Congress, and for the general public. PIR data is compiled for use at the federal, regional, state, and local levels. The PIR was shared with the PPS Head Start Parent Policy Council on November 9, 2021. This report is for the Governing Body's information only. Governing Body approval is not required.

RELATED POLICIES/BEST PRACTICES

Items listed above are required to be reviewed, updated, and/or approved by the Parent Policy Council and Governing Board.

ANALYSIS OF SITUATION

All items listed above support the high quality, comprehensive wraparound services provided to the children and families attending PPS Head Start.

FISCAL IMPACT

1. There is no known fiscal impact of these items. Continued federal funding of PPS Head Start is dependent upon compliance with Head Start Program Performance Standards, which includes requesting approval of recommendations and reports from the program's governing bodies.

COMMUNITY ENGAGEMENT (IF APPLICABLE)
PPS Head Start Parent Policy Council reviewed, provided input, and approved these actions/documents on November 9, 2021 as noted above and as reflected in the attached meeting minutes.

TIMELINE FOR IMPLEMENTATION / EVALUATION
The timeline for implementation will be the 2021-2022 school year.

BOARD OPTIONS WITH ANALYSIS
Board approval needed.

CONNECTION TO BOARD GOALS
The goal of PPS Head Start is to prepare the city's diverse and resilient young children for successful transitions to kindergarten and beyond by leveraging each child's strengths, building their social competence, and developing school readiness skills.

Portland Public Schools' vision is this: Every student, every teacher, and every school succeeding. The school district's mission is that every student by name is prepared for college, career, and participation as an active community member, regardless of race, income, or zip code. The Board adopted the following four priorities for the 2018-19 school year to move the school district toward the above aspirations:

- Set a clear vision and strategic plan.
- Create equitable opportunities and outcomes for all students.
- Build management accountability systems and structures.
- Allocate budget, funding, and resources focused on improving outcomes for students.

All of the above items support the district's and School Board's vision and priorities.

STAFF RECOMMENDATION
Develop Board resolutions and obtain signature approval of the Board Chair of the attached documents.

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

(Initials)

ATTACHMENTS

A. 2020-2021 Program Annual Report
B. 2020-2021 Program Annual Report Board Resolution
C. 2020-2021 Program Annual Report Governing Body Approval Letter
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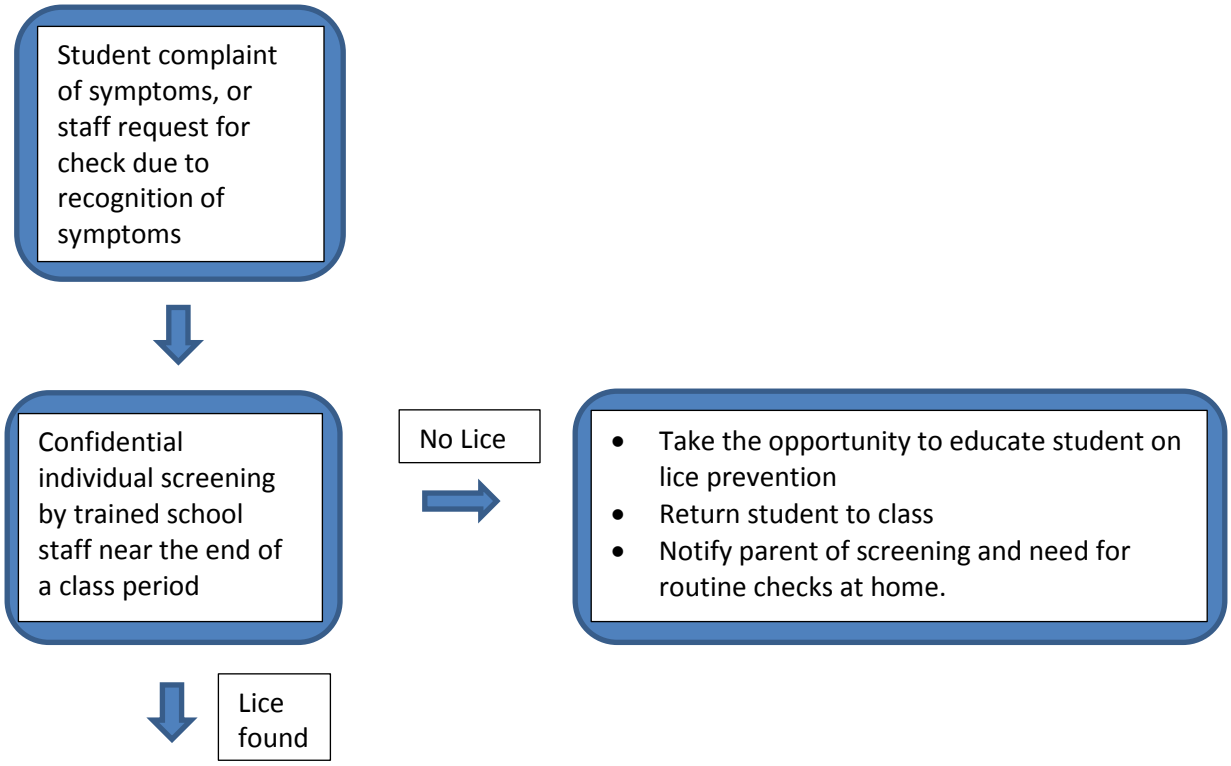
S. 11.9.21 PPS Head Start Parent Policy Council Meeting Minutes

Managing Presumed Head Lice in Schools



Recommended Responses

- Educate student on avoiding head-to-head contact and sharing of personal items
- Notify parent/guardian of the findings of the screening
- Provide information to parent/guardian on the biology of head lice and methods to eliminate infestations
- Return student to next class period if parent will not be picking them up before the end of the school day

Unjustified Responses

- Excluding or quarantining the student or his/her possessions
- Violating confidentiality of the affected student and his/her family
- Notifying other students and parents of minor health issues affecting classmates
- Mass screening of students for head lice and/or nits
- Applying insecticides to classrooms and buses
- Reporting cases of head lice to DHS
- Bagging of coats and clothes
- Restricting the use of headphones or helmets

PORTLAND PUBLIC SCHOOLS
Head Start Program
4800 NE 74th Avenue• Portland,OR 97218
503-916--5724• Fax: 503-916--2670

Kathy Schuknecht
Regional Program Manager
Office of Head Start

Subject: Lice Management Procedures

Dear Ms. Kathy Schuknecht,

Portland Public Schools Head Start Policy Council has approved the program's Lice Management Procedures.

The signature below is confirmation the Head Start Policy Council has approved this request.

Thank you,

Head Start Director — Date 11/29/21

Policy Council Chair — Date 11/29/2021

Portland Public Schools is an equal opportunity educator and employer.

PORTLAND PUBLIC SCHOOLS
Head Start Program
4800 NE 74th Avenue
Portland,OR 97218
503-916-5724• Fax: 503-916-2670

HEAD START PROGRAM

Kathy Schuknecht
Regional Program Manager
Office of Head Start

Subject: PPS Head Start Lice Management Procedures

Dear Ms. Kathy Schuknecht,

Portland Public Schools Head Start Governing Board has approved PPS Head Start's Lice Management Procedures.

The signature below is confirmation the Head Start Governing Board has approved this request.

Thank you.

Head Start Director — Date 11/29/2021

Governing Board Chair — Date

Portland Public Schools is an equal opportunity educator and employer.

RESOLUTION No. 6415

Approval of Head Start Policy Council Recommendation

RECITALS

A. Federal requirements call for the Governing Board of a Head Start program to approve recommendations for the program.

B. The Board of Directors for Portland Public Schools serves as the Governing Board for the PPS Head Start Program.

C. Portland Public Schools Policy Council recommends the approval of the 2020-2021 PPS Head Start Program Annual Report. The Head Start Program Performance Standards provide requirements and procedures for the Annual Report. The Annual Report includes yearlong information regarding Head Start program data. It is used as a community resource and contains information from the PIR. Program budget information is also shared in the annual report.

RESOLUTION

The Board of Directors for Portland Public Schools, School District No. 1J, Multnomah County, Oregon, approves the Head Start Policy Council recommendations as stated above.

2020-2021 HEAD START PROGRAM INFORMATION REPORT
10CH010719-000 PORTLAND PUBLIC SCHOOLS HEAD START PROGRAM

A. PROGRAM INFORMATION

GENERAL INFORMATION

Grant Number	10CH010719
Program Number	000
Program Type	Head Start
Program Name	PORTLAND PUBLIC SCHOOLS HEAD START PROGRAM
Program Address	4800 NE 74th Avenue
Program City, State, Zip Code (5+4)	Portland, OR, 97218-3824
Program Phone Number	(503) 916 5724
Head Start or Early Head Start Director Name	Dr. Robert Cantwell
Head Start or Early Head Start Director Email	rcantwell@pps.net
Agency Email	rcantwell@pps.net
Agency Web Site Address	https://www.pps.net/headstart
Name and Title of Approving Official	Ms. Michelle DePass, Board Chair
DUNS Number	054971650
Agency Type	School System
Agency Description	Grantee that directly operates program(s) and has no delegates

FUNDED ENROLLMENT

Funded enrollment by funding source

	# of children
A.1 Funded Enrollment:	760
a. Head Start/Early Head Start Funded Enrollment, as identified on the NOA that captures the greatest part of the program year	297
b. Funded Enrollment from non-federal sources, i.e. state, local, private	463

Funded enrollment by program option

	# of slots
A.2 Center-based option	
a. Number of slots equal to or greater than 1,020 annual hours for Head Start preschool children or 1,380 annual hours for Early Head Start infants and toddlers	760
1. Of these, the number that are available for the full-working-day and full-calendar-year	0
b. Number of slots with fewer than 1,020 annual hours for Head Start preschool children or 1,380 annual hours for Early Head Start infants and toddlers	0
1. Of these, the number that are available for 3.5 hours per day for 128 days	0
2. Of these, the number that are available for a full working day	0
A.3 Home-based option	0
A.4 Family child care option	0
A.5 Locally designed option	0

Funded slots at child care partner

	# of slots
A.7 Total number of slots in the center-based or locally designed option	760
a. Of these, the total number of slots at a child care partner	0
A.8 Total funded enrollment at child care partners (includes center-based, locally designed, and family child care program options)	0

CLASSES IN CENTER-BASED

	# of classes
A.9 Total number of center-based classes operated	35
a. Of these, the number of double session classes	0

CUMULATIVE ENROLLMENT

Children by age

	# of children at enrollment
A.10 Children by age:	
a. Under 1 year	0
b. 1 year old	0
c. 2 years old	0
d. 3 years old	38
e. 4 years old	349
f. 5 years and older	0
g. Total cumulative enrollment of children	387

Total cumulative enrollment

	# of children
A.12 Total cumulative enrollment	387

Primary type of eligibility

	# of children
A.13 Report each enrollee only once by primary type of eligibility:	
a. Income at or below 100% of federal poverty line	222
b. Public assistance such as TANF and SSI	13
c. Foster care	12
d. Homeless	49
e. Eligibility based on other type of need, but not counted in A.13.a through d	32

	# of children
f. Incomes between 100% and 130% of the federal poverty line, but not counted in A.13.a through e	59

A.14 If the program serves enrollees under A.13.f, specify how the program has demonstrated that all income-eligible children in their area are being served.
Due to COVID our program limited enrollment to 350 children during the 2020-21 year. We had mostly returning children as a part of our enrollment and recruitment efforts were necessarily limited. This caused us to enroll families who fall into the 100-130% category.

Prior enrollment

	# of children
A.15 Enrolled in Head Start or Early Head Start for:	
a. The second year	289
b. Three or more years	3

Transition and turnover

	# of children
A.16 Total number of preschool children who left the program any time after classes or home visits began and did not re-enroll	43
a. Of the preschool children who left the program during the program year, the number of preschool children who were enrolled less than 45 days	25

	# of preschool children
A.17 Of the number of preschool children enrolled in Head Start at the end of the current enrollment year, the number projected to be entering kindergarten in the following school year	310

Child care subsidy

	# of children
A.24 The number of enrolled children for whom the program and/or its partners received a child care subsidy during the program year	0

Ethnicity and race

	# of children	
	(1) Hispanic or Latino origin	*(2) Non-Hispanic or Non-Latino origin*
A.25 Race and ethnicity		
a. American Indian or Alaska Native	3	12
b. Asian	1	61
c. Black or African American	4	69
d. Native Hawaiian or other Pacific Islander	0	3
e. White	117	79
f. Bi-racial/Multi-racial	16	19
g. Other	0	0
h. Unspecified	3	0
Explain:	parents declined to identify their race	

Primary language of family at home

	# of children
A.26 Primary language of family at home:	
a. English	221
1. Of these, the number of children acquiring/learning another language in addition to English	11
b. Spanish	89
c. Native Central American, South American & Mexican Languages (e.g., Mixteco, Quichean.)	4
d. Caribbean Languages (e.g., Haitian-Creole, Patois)	1
e. Middle Eastern & South Asian Languages (e.g., Arabic, Hebrew, Hindi, Urdu, Bengali)	5
f. East Asian Languages (e.g., Chinese, Vietnamese, Tagalog)	48
g. Native North American/Alaska Native Languages	0
h. Pacific Island Languages (e.g., Palauan, Fijian)	1
i. European & Slavic Languages (e.g., German, French, Italian, Croatian, Yiddish, Portuguese, Russian)	6
j. African Languages (e.g., Swahili, Wolof)	6
k. American Sign Language	0
l. Other (e.g., American Sign Language)	0
m. Unspecified (language is not known or parents declined identifying the home language)	6

Dual language learners

	# of children
A.27 Total number of Dual Language Learners	177

Transportation

	# of children
A.28 Number of children for whom transportation is provided to and from classes	0

RECORD KEEPING

Management Information Systems

A.29 List the management information system(s) your program uses to support tracking, maintaining, and using data on enrollees, program services, families, and program staff.
Name/title
ChildPlus

B. PROGRAM STAFF & QUALIFICATIONS

TOTAL STAFF

Staff by type

	(1) # of Head Start or Early Head Start staff	(2) # of contracted staff
B.1 Total number of staff members, regardless of the funding source for their salary or number of hours worked	177	0
a. Of these, the number who are current or former Head Start or Early Head Start parents	30	0

TOTAL VOLUNTEERS

Volunteers by type

	# of volunteers
B.2 Number of persons providing any volunteer services to the program during the program year	0
a. Of these, the number who are current or former Head Start or Early Head Start parents	0

EDUCATION AND CHILD DEVELOPMENT STAFF

Preschool classroom and assistant teachers (HS and Migrant programs)

	(1) # of classroom teachers	(2) # of assistant teachers
B.3 Total number of preschool education and child development staff by position	39	86

	(1) # of classroom teachers	(2) # of assistant teachers
Of the number of preschool education and child development staff by position, the number with the following:		
a. An advanced degree in:		
1. Early childhood education 2. Any field and coursework equivalent to a major relating to early childhood education, with experience teaching preschool-age children	21	0

	(1) # of classroom teachers	(2) # of assistant teachers
Of the number of preschool education and child development staff by position, the number with the following:		
b. A baccalaureate degree in one of the following:		
1. Early childhood education 2. Any field and coursework equivalent to a major relating to early childhood education with experience teaching preschool-age children or 3. Any field and is part of the Teach for America program and passed a rigorous early childhood content exam	3	0

	(1) # of classroom teachers	(2) # of assistant teachers
Of the number of preschool education and child development staff by position, the number with the following:		
c. An associate degree in:		
1. Early childhood education 2. A field related to early childhood education and coursework equivalent to a major relating to early childhood education with experience teaching preschool-age children	0	2

	(1) # of classroom teachers	(2) # of assistant teachers
Of the number of preschool education and child development staff by position, the number with the following:		
d. A Child Development Associate (CDA) credential or state-awarded certification, credential, or licensure that meets or exceeds CDA requirements	0	22
1. Of these, a CDA credential or state-awarded certification, credential, or licensure that meets or exceeds CDA requirements and that is appropriate to the option in which they are working	0	21

	(1) # of classroom teachers	(2) # of assistant teachers
Of the number of preschool education and child development staff by position, the number with the following:		
e. None of the qualifications listed in B.3.a through B.3.d	15	62

Preschool classroom teachers program enrollment

	# of classroom teachers
B.4 Total number of preschool classroom teachers that do not meet qualifications listed in B.3.a or B.3.b	15
a. Of these preschool classroom teachers, the number enrolled in a degree program that would meet the qualifications described in B.3.a or B.3.b	0

Preschool classroom assistant teachers program enrollment

	# of assistant teachers
B.5 Total number of preschool assistant teachers that do not have any qualifications listed in B.3.a through B.3.d	62
a. Of these preschool assistant teachers, the number enrolled in a degree, certification, credential, or licensure program that would meet one of the qualifications listed in B.3.a through B.3.d.	1

Home visitors and family child care provider staff qualifications

	# of home visitors
B.8 Total number of home visitors	0
a. Of these, the number of home visitors that have a home-based CDA credential or comparable credential, or equivalent coursework as part of an associate's, baccalaureate, or advanced degree	0
b. Of these, the number of home visitors that do not meet one of the qualifications described in B.8.a.	0

	# of home visitors
1. Of the home visitors in B.8.b, the number enrolled in a degree or credential program that would meet a qualification described in B.8.a.	0

	# of family child care providers
B.9 Total number of family child care providers	0
a. Of these, the number of family child care providers that have a Family Child Care CDA credential or state equivalent, or an associate, baccalaureate, or advanced degree in child development or early childhood education	0
b. Of these, the number of family child care providers that do not meet one of the qualifications described in B.9.a.	0
1. Of the family child care providers in B.9.b, the number enrolled in a degree or credential program that would meet a qualification described in B.9.a.	0

	# of child development specialists
B.10 Total number of child development specialists that support family child care providers	0
a. Of these, the number of child development specialists that have a baccalaureate degree in child development, early childhood education, or a related field	0
b. Of these, the number of child development specialists that do not meet one of the qualifications described in B.10.a.	0
1. Of the child development specialists in B.10.b, the number enrolled in a degree or credential program that would meet a qualification described in B.10.a.	0

Ethnicity and race

	# of non-supervisory education and child development staff	
	(1) Hispanic or Latino origin	(2) Non-Hispanic or Non-Latino origin
B.13 Race and Ethnicity		
a. American Indian or Alaska Native	0	1
b. Asian	0	30
c. Black or African American	0	7
d. Native Hawaiian or other Pacific Islander	0	1
e. White	18	66
f. Biracial/Multi-racial	1	0
g. Other	0	0
h. Unspecified	0	1
Explain:	Declined to answer	

Language

	# of non-supervisory education and child development staff
B.14 The number who are proficient in a language(s) other than English.	48
a. Of these, the number who are proficient in more than one language other than English	1

	# of non-supervisory education and child development staff
B.15 Language groups in which staff are proficient:	
a. Spanish	17
b. Native Central American, South American, and Mexican Languages (e.g., Mixteco, Quichean.)	0
c. Caribbean Languages (e.g., Haitian-Creole, Patois)	0
d. Middle Eastern and South Asian Languages (e.g., Arabic, Hebrew, Hindi, Urdu, Bengali)	0
e. East Asian Languages (e.g., Chinese, Vietnamese, Tagalog)	29
f. Native North American/Alaska Native Languages	0
g. Pacific Island Languages (e.g., Palauan, Fijian)	0
h. European and Slavic Languages (e.g., German, French, Italian, Croatian, Yiddish, Portuguese, Russian)	2
i. African Languages (e.g., Swahili, Wolof)	0
j. American Sign Language	0
k. Other	0
l. Unspecified (language is not known or parents declined identifying the language)	0

STAFF TURNOVER

All staff turnover

	(1) # of Head Start staff	(2) # of contracted staff
B.16 Total number of staff who left during the program year (including turnover that occurred while the program was not in session, e.g. summer months)	3	0
a. Of these, the number who were replaced	3	0

Education and child development staff turnover

	# of staff
B.17 The number of teachers, preschool assistant teachers, family child care providers, and home visitors who left during the program year (including turnover that occurred while classes and home visits were not in session, e.g. during summer months)	2
a. Of these, the number who were replaced	2
b. Of these, the number who left while classes and home visits were in session	2

	# of staff
B.18 Of the number of education and child development staff that left, the number that left for the following primary reason:	
a. Higher compensation	0
1. Of these, the number that moved to state pre-k or other early childhood program	0
b. Retirement or relocation	0
c. Involuntary separation	0
d. Other (e.g. change in job field, reason not provided)	2

1. Specify:	Reason Not Provided
B.19 Number of vacancies during the program year that remained unfilled for a period of 3 months or longer	0

C. CHILD AND HEALTH SERVICES

HEALTH SERVICES

Health insurance – children

	(1) # of children at enrollment	(2) # of children at end of enrollment
C.1 Number of all children with health insurance	374	377
a. Of these, the number enrolled in Medicaid and/or CHIP	340	345
b. Of these, the number enrolled in state-only funded insurance (e.g., medically indigent insurance), private insurance, or other health insurance	34	32
C.2 Number of children with no health insurance	13	10

Accessible health care - children

	(1) # of children at enrollment	(2) # of children at end of enrollment
C.5 Number of children with an ongoing source of continuous, accessible health care provided by a health care professional that maintains the child's ongoing health record and is not primarily a source of emergency or urgent care	180	281
a. Of these, the number of children that have accessible health care through a federally qualified Health Center, Indian Health Service, Tribal and/or Urban Indian Health Program facility	44	86

Medical services – children

	(1) # of children at enrollment	(2) # of children at end of enrollment
C.7 Number of all children who are up-to-date on a schedule of age-appropriate preventive and primary health care according to the relevant state's EPSDT schedule for well child care	12	5

	# of children
a. Of these, the number of children diagnosed with any chronic condition by a health care professional, regardless of when the condition was first diagnosed	2
1. Of these, the number who received medical treatment for their diagnosed chronic health condition	2
b. Specify the primary reason that children with any chronic condition diagnosed by a health care professional did not receive medical treatment:	# of children
1. No medical treatment needed	0
2. No health insurance	0
3. Parents did not keep/make appointment	0
4. Children left the program before their appointment date	0
5. Appointment is scheduled for future date	0
6. Other	0

C.8 Number of children diagnosed by a health care professional with the following chronic condition, regardless of when the condition was first diagnosed:	*# of children*
a. Autism spectrum disorder (ASD)	5
b. Attention deficit hyperactivity disorder (ADHD)	3
c. Asthma	18
d. Seizures	1
e. Life-threatening allergies (e.g. food allergies, bee stings, and medication allergies that may result in systemic anaphylaxis)	3
f. Hearing Problems	6
g. Vision Problems	42
h. Blood lead level test with elevated lead levels >5 g/dL	1
i. Diabetes	0

Body Mass Index (BMI) – children (HS and Migrant programs)

	# of children at enrollment
C.9 Number of children who are in the following weight categories according to the 2000 CDC BMI-for-age growth charts	
a. Underweight (BMI less than 5th percentile for child's age and sex)	11
b. Healthy weight (at or above 5th percentile and below 85th percentile for child's age and sex)	199
c. Overweight (BMI at or above 85th percentile and below 95th percentile for child's age and sex)	46
d. Obese (BMI at or above 95th percentile for child's age and sex)	43

Immunization services - children

	(1) # of children at enrollment	*(2) # of children at end of enrollment*
C.10 Number of children who have been determined by a health care professional to be up-to-date on all immunizations appropriate for their age	316	335
C.11 Number of children who have been determined by a health care professional to have received all immunizations possible at this time but who have not received all immunizations appropriate for their age	22	16
C.12 Number of children who meet their state's guidelines for an exemption from immunizations	17	18

Accessible dental care – children

	(1) # of children at enrollment	*(2) # of children at end of enrollment*
C.16 Number of children with continuous, accessible dental care provided by an oral health care professional which includes access to preventive care and dental treatment	159	247

Preschool dental services (HS and Migrant programs)

	# of children at end of enrollment
C.17 Number of children who received preventive care during the program year	207
C.18 Number of all children, including those enrolled in Medicaid or CHIP, who have completed a professional dental examination during the program year	208
a. Of these, the number of children diagnosed as needing dental treatment during the program year - at end of enrollment	62
1. Of these, the number of children who have received or are receiving dental treatment - at end of enrollment	35
b. Specify the primary reason that children who needed dental treatment did not receive it:	# of children
1. Health insurance doesn't cover dental treatment	0
2. No dental care available in local area	0
3. Medicaid not accepted by dentist	0
4. Dentists in the area do not treat 3 – 5 year old children	0
5. Parents did not keep/make appointment	6
6. Children left the program before their appointment date	0
7. Appointment is scheduled for future date	0
8. No transportation	0
9. Other	21
1. Specify:	Unable to provide service due to Covid.

Mental health consultation

	# of staff
C.20 Total number of classroom teachers, home visitors, and family child care providers	39
a. Indicate the number of classroom teachers, home visitors, and family child care providers who received assistance from a mental health consultant through observation and consultation	0

DISABILITIES SERVICES

IDEA eligibility determination

	# of children
C.21 The total number of children referred for an evaluation to determine eligibility under the Individuals with Disabilities Education Act (IDEA) during the program year	18
a. Of these, the number who received an evaluation to determine IDEA eligibility	11
1. Of the children that received an evaluation, the number that were diagnosed with a disability under IDEA	9
2. Of the children that received an evaluation, the number that were not diagnosed with a disability under IDEA	2
1. Of these children, the number for which the program is still providing or facilitating individualized services and supports such as an individual learning plan or supports described under Section 504 of the Rehabilitation Act.	0
b. Of these, the number who did not receive an evaluation to determine IDEA eligibility	7

	# of children
C.22 Specify the primary reason that children referred for an evaluation to determine IDEA eligibility did not receive it:	
a. The responsible agency assigned child to Response to Intervention (RTI)	0
b. Parent(s) refused evaluation	5
c. Evaluation is pending and not yet completed by responsible agency	2
d. Other	0

Preschool disabilities services (HS and Migrant programs)

	# of children
C.23 Number of children enrolled in the program who had an Individualized Education Program (IEP), at any time during the program year, indicating they were determined eligible by the LEA to receive special education and related services under the IDEA	75
a. Of these, the number who were determined eligible to receive special education and related services:	# of children
1. Prior to this program year	64
2. During this enrollment year	11
b. Of these, the number who have not received special education and related services	1

Preschool primary disabilities (HS and Migrant programs)

	(1) # of children determined to have this disability	(2) # of children receiving special services
C.25 Diagnosed primary disability:		
a. Health impairment (i.e. meeting IDEA definition of "other health impairment")	0	0
b. Emotional disturbance	0	0
c. Speech or language impairments	30	30
d. Intellectual disabilities	0	0
e. Hearing impairment, including deafness	3	3
f. Orthopedic impairment	0	0
g. Visual impairment, including blindness	0	0
h. Specific learning disability	0	0
i. Autism	9	9
j. Traumatic brain injury	0	0
k. Non-categorical/developmental delay	32	29
l. Multiple disabilities (excluding deaf-blind)	1	1
m. Deaf-blind	0	0

EDUCATION AND DEVELOPMENT TOOLS/APPROACHES

Screening

	# of children
C.26 Number of all newly enrolled children since last year's PIR was reported	98
C.27 Number of all newly enrolled children who completed required screenings within 45 days for developmental, sensory, and behavioral concerns since last year's PIR was reported	8
a. Of these, the number identified as needing follow-up assessment or formal evaluation to determine if the child has a disability	7

C.28 The instrument(s) used by the program for developmental screening
Name/title
ASQ (all editions)

Assessment

C.29 Approach or tool(s) used by the program to support ongoing child assessment
Name/title
Other (Please Specify)

Curriculum

C.30 Curriculum used by the program:
a. For center-based services
Name/title
Other (Please Specify)

Classroom and home visit observation tools

	Yes (Y) / No (N)
C.31 Does the program routinely use classroom or home visit observation tools to assess quality?	No

FAMILY AND COMMUNITY PARTNERSHIPS

Number of families

	# of families at enrollment
C.33 Total number of families:	375
a. Of these, the number of two-parent families	209
b. Of these, the number of single-parent families	166
C.34 Of the total number of families, the number in which the parent/guardian figures are best described as:	
a. Parent(s) (e.g. biological, adoptive, stepparents)	304
1. Of these, the number of families with a mother only (biological, adoptive, stepmother)	137
2. Of these, the number of families with a father only (biological, adoptive, stepfather)	9
b. Grandparents	7
c. Relative(s) other than grandparents	2
d. Foster parent(s) not including relatives	5

	# of families at enrollment
e. Other	57
1. Specify: No description given	

Parent/guardian education

	# of families at enrollment
C.35 Of the total number of families, the highest level of education obtained by the child's parent(s) / guardian(s):	
a. An advanced degree or baccalaureate degree	33
b. An associate degree, vocational school, or some college	55
c. A high school graduate or GED	86
d. Less than high school graduate	97

Employment, Job Training, and School

	# of families at enrollment
C.36 Total number of families in which:	
a. At least one parent/guardian is employed, in job training, or in school at enrollment	240
1. Of these families, the number in which one or more parent/guardian is employed	233
2. Of these families, the number in which one or more parent/guardian is in job training (e.g. job training program, professional certificate, apprenticeship, or occupational license)	88
3. Of these families, the number in which one or more parent/guardian is in school (e.g. GED, associate degree, baccalaureate, or advanced degree)	13
b. Neither/No parent/guardian is employed, in job training, or in school at enrollment (e.g. unemployed, retired, or disabled)	135

	# of families at end of enrollment
C.37 Total number of families in which:	
a. At least one parent/guardian is employed, in job training, or in school at end of enrollment	119
1. Of these families, the number of families that were also counted in C.36.a (as having been employed, in job training, or in school at enrollment)	105
2. Of these families, the number of families that were also counted in C.36.b (as having not been employed, in job training, or in school at enrollment)	14
b. Neither/No parent/guardian is employed, in job training, or in school at end of enrollment (e.g. unemployed, retired, or disabled)	256
1. Of these families, the number of families that were also counted in C.36.a	135
2. Of these families, the number of families that were also counted in C.36.b	121

	# of families at enrollment
C.38 Total number of families in which:	
a. At least one parent/guardian is a member of the United States military on active duty	0
b. At least one parent/guardian is a veteran of the United States military	0

Federal or other assistance

	# of families at enrollment	# of families at end of enrollment
C.39 Total number of families receiving any cash benefits or other services under the Federal Temporary Assistance to Needy Families (TANF) Program	61	56
C.40 Total number of families receiving Supplemental Security Income (SSI)	14	14
C.41 Total number of families receiving services under the Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)	168	96
C.42 Total number of families receiving services under the Supplemental Nutrition Assistance Program (SNAP), formerly referred to as Food Stamps	86	78

Family services

	# of families
C.43 The number of families that received the following program service to promote family outcomes:	
a. Emergency/crisis intervention (e.g. meeting immediate needs for food, clothing, or shelter)	141
b. Housing assistance (e.g. subsidies, utilities, repairs)	41
c. Asset building services (e.g. financial education, debt counseling)	4
d. Mental health services	25
e. Substance misuse prevention	2
f. Substance misuse treatment	2
g. English as a Second Language (ESL) training	33
h. Assistance in enrolling into an education or job training program	33
i. Research-based parenting curriculum	27
j. Involvement in discussing their child's screening and assessment results and their child's progress	135
k. Supporting transitions between programs (i.e. EHS to HS, HS to kindergarten)	177
l. Education on preventive medical and oral health	46
m. Education on health and developmental consequences of tobacco product use	119
n. Education on nutrition	133
o. Education on postpartum care (e.g. breastfeeding support)	8
p. Education on relationship/marriage	10
q. Assistance to families of incarcerated individuals	5
C.44 Of these, the number of families who were counted in at least one of the services listed above	228

Father engagement

	# of father/ father figures
C.45 Number of fathers/father figures who were engaged in the following activities during this program year:	
a. Family assessment	148
b. Family goal setting	144
c. Involvement in child's Head Start child development experiences (e.g. home visits, parent-teacher conferences, etc.)	104
d. Head Start program governance, such as participation in the Policy Council or policy committees	16

	# of father/ father figures
e. Parenting education workshops	22

Homelessness services

	# of families
C.46 Total number of families experiencing homelessness that were served during the enrollment year	47

	# of children
C.47 Total number of children experiencing homelessness that were served during the enrollment year	48

	# of families
C.48 Total number of families experiencing homelessness that acquired housing during the enrollment year	13

Foster care and child welfare

	# of children
C.49 Total number of enrolled children who were in foster care at any point during the program year	16
C.50 Total number of enrolled children who were referred to Head Start/Early Head Start services by a child welfare agency	4

D. GRANT LEVEL QUESTIONS

INTENSIVE COACHING

	# of education and child development staff
D.1 The number of education and child development staff (i.e. teachers, preschool assistant teachers, home visitors, FFC providers) that received intensive coaching	0

	# of coaches
D.2 The number of individuals that provided intensive coaching, whether by staff, consultants, or through partnership	0

FAMILY SERVICES STAFF QUALIFICATIONS

	# of family services staff
D.5 Total number of family services staff:	0
a. Of these, the number that have a credential, certification, associate, baccalaureate, or advanced degree in social work, human services, family services, counseling, or a related field	0
b. Of these, the number that do not meet one of the qualifications described in D.5.a	0
1. Of the family services staff in D.5.b, the number enrolled in a degree or credential program that would meet a qualification described in D.5.a.	0
2. Of the family services staff in D.5.b, the number hired before November 7, 2016	0

FORMAL AGREEMENTS FOR COLLABORATION

	# of formal agreements
D.6 Total number of formal agreements with child care partners	0
D.7 Total number of LEAs in the service area	1
a. Of these, the total number of formal agreements with those LEAs to coordinate services for children with disabilities	2
b. Of these, the total number of formal agreements with those LEAs to coordinate transition services	2

REPORTING INFORMATION

PIR Report Status	Completed
Confirmation Number	21083049814
Last Update Date	08/30/2021

PORTLAND PUBLIC SCHOOLS

Head Start

Annual Report 2020–2021

PORTLAND PUBLIC SCHOOLS

Head Start

Our Vision:

Our vision is children growing and thriving in a supportive, nurturing environment of parents, family, neighborhood, and community where they and their families have options and opportunities for optimum growth, development, and learning.

Our Mission:

As proven leaders in early childhood education and family development, Portland Public Schools Head Start is dedicated to enhancing the quality of life for vulnerable children and families in Multnomah County. Our knowledgeable and caring staff accomplish our mission by providing early education and family support to families of children from three to five years old, emphasizing healthy outcomes and school readiness, promoting family self-sufficiency, and partnering with individuals, school districts, and our community. When we say "school readiness," we mean children are ready for school, families are ready to support their children's learning, and schools are ready for children.

Our Core Values:

- Recognizing, honoring, and giving voice to the racial, ethnic, and linguistic diversity of the families we serve.
- Working as a team, we can effectively promote respectful, sensitive, and proactive approaches to learning and growth.
- Nurturing the cognitive, physical, social, and emotional development of each child.
- Fostering community partnerships to support families and children during and after the Head Start experience.
- Valuing individuality while recognizing that children and adults develop and prosper within the context of relationships.
- Empowering families to achieve self-sufficiency by identifying their own strengths, needs, and interests while finding solutions and making positive changes.
- Implementing shared decision making as a collective responsibility of families, governing bodies, and staff where ideas and opinions are heard and respected.
- Supporting healthy behaviors that enhance wellness.
- Emphasizing learning through play.
- Keeping families' hopes and dreams as our central focus.

Head Start
Portland Public Schools

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 Schools Board of Education 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.

PORTLAND PUBLIC SCHOOLS
Head Start

Annual Report 2020–2021

Director: Robert Cantwell, Ed.D

The 2020–2021 school year was unprecedented in terms of challenging the field of education to deliver developmentally and culturally appropriate supports and services to children and families due to the impact and influence of the coronavirus pandemic. The staff and families within Portland Public Schools Head Start adjusted and persevered through many adversities. Classroom cohorts were limited to ten students per group. Instructional and family service staff pivoted to delivering services via a fully online format. Children and families embraced the use of new technology hardware and software at home. Old and new community partnerships were forged and strengthened. Racial equity and social justice assumed more prominent positions as pillars of the program. Crises were transformed into learning opportunities. Looking back, new learning frameworks were implemented resulting in positive student outcomes. New ways of conducting business and connecting with families were discovered. We all tapped into deeper wells of resilience and looked to each other for support. This report reflects the experiences and resolve of a community of people who refused to give up on its young learners and who embraced change with all the love and determination at its collective disposal.

Basic Program Facts

The Portland Public Schools Head Start program served 350 children—ages three- to five-years—in 35 classrooms. For most of the year, we were in Comprehensive Distance Learning (CDL) delivering services virtually. From April 1 through June 11, we offered in-person half-day services in the morning to families who wanted it, as well as afternoon CDL services to families who were more comfortable with that option. Our Head Start grantee is the PPS school district so the program follows the school calendar.

The program's curriculum, Tools of the Mind®, aligns with Portland Public Schools through common literacy and math benchmarks and assessments. In a typical year, ongoing child observation and assessment in the areas of: Cognitive, Language, Social/Emotional and Physical Development, are used to develop each Individual Learning Plan. This was not possible during the 2020–2021 school year. Beginning in the 2021–2022 school year the Desired Results Developmental Profile (DRDP)© is our assessment resource to guide this work. Teaching Strategies Gold® was utilized in prior school years.

Head Start parents are engaged in their child's learning to support progress toward their educational goals. Parents are involved in leadership, educational, literacy and employment related opportunities to support lifelong learning experiences in the community.

PPS Head Start · OREGON HEAD START ASSOCIATION · portland children's levy Investing in our future · OREGON DEPARTMENT OF EDUCATION Oregon achieves . . . together!

Who We Served—Children & Families 2020–2021

Enrollment Opportunities

	20–21 / Full
Applegate	40 / 77
Creston Annex	40 / 104
Clarendon	70 / 141
Kelly Center	60 / 145
Grout	20 / 40
Jason Lee	20 / 40
Sacajawea	60 / 158
Sitton	20 / 40
Whitman	20 / 40

Total Funded Enrollment 350/760

Age

4 year olds	93.0%
3 year olds	7.0%

(Note: Due to Covid restrictions, we limited enrollment to 50% capacity and gave priority to returning students who are typically 4 year olds. In a typical school year, the age percentages are more balanced with 4 year olds at 58% and 3 year olds at 42%.)

Ethnicity

Hispanic	33.0%
Non-Hispanic	67.0%

Race

Black/African American	20.8%
American Indian/Alaskan Native	4.4%
White	42.0%
Asian	17.4%
Hawaiian/Pacific Islander	1.0%
Bi-racial/Multi-racial	9.5%

DLL (Duel Language Learners) 38.7%

Spanish	21.0%
Chinese	8.6%
Vietnamese	5.0%
Other	4.0%

20% of our Head Start enrollment were children with disabilities.

Assistance Type by Percent of Families

Families Receiving TANF	11%
Families Receiving SSI	3%
Families Receiving WIC	39%
Homeless Families	10%
Families Receiving SNAP	26%

Family Engagement

Services Provided

Number of referrals to Community Agencies

Emergency/Crisis Intervention	141
Housing Assistance	41
Mental Health Services	25
Parenting Education	27
ESL training	33
Adult education	33
Job Training	33
Substance Abuse Prevention/Training	2
Relationship Education	10
Health Education	133
Assistance to Families of Incarcerated Individuals	5
Parents receiving at least one service	**523**

Children up-to-date on dental exams	96%
Families/Children who had an identified Medical Home:	72%

This past year was impacted by the coronavirus in many ways. People were at different levels of comfort seeking preventative medical care for themselves and their children. Head Start focused on helping families identify their medical home; the clinic where they would typically go to seek health care, should they decide to do so. We shared information from clinics and health plans that explained the strategies medical providers were using to keep patients safe during office visits. We shared information about novel strategies: doctors prescreening need for immunizations, so children could get their immunization updates in the parking lot while in their car seats. We walked through the steps for using telehealth or "virtual office visits." We continued to offer support to families who had health issues, and coordinated care.

In dental practice, our partners at Dental3 provided dental screening and referral at all of our Head Start sites. The first two sets of screenings were done outdoors, and the third at the classroom doors. Dental offices in the community also reached out to patients to explain how their infection control practices were keeping people safe. Head Start also distributed toothbrushes to families during the year and teachers reminded children that brushing keeps you healthy.

Family Engagement Activities

- Policy Council
- Parent Workshops
- Parent Input Surveys
- Health Advisory Committee
- Family and Child Home Visits
- Multnomah County Library "Every Child a Reader" program

During this school year parents were highly involved in their child's learning. The pandemic gave parents the opportunity to support learning at home, through various virtual platforms, in order to help their children learn and grow. PPS Head Start presented many opportunities for parents to provide feedback and be involved in decision making for the program.

Head Start parents are engaged in their child's learning to support progress toward their educational goals. Parents are involved in leadership, educational, literacy and employment-related opportunities to support lifelong learning experiences in the community.

Head Start Operating Expenses

Program Expenses
Totals from Budget-to-Actual Reports

Grant Description – FY 2021

Federal Head Start Grant	$	5,618,686.00	46%
Oregon PreK Grant	$	5,799,811.00	47%
Portland Children's Levy	$	551,897.00	5%
Federal Title IA Grant	$	240,000.00	2%
	$	**12,210,394.00**	100%

Average cost per child for FY (Expenses/760)	$	16,066.00
Average cost per Federal Awarded Slots for grant year 11/1/2020–10/31/21 (Award/297)	$	18,918.00
Average cost per State Awarded Slots for grant year 7/1/2020–6/30/21 (Award/463)	$	12,527.00

Grant Description – FY 2020 (reported on July 28, 2020)

Federal Head Start Grant	$	5,504,113.00	47%
Oregon PreK Grant	$	4,368,868.00	37%
Portland Children's Levy	$	524,280.00	5%
Federal Title IA Grant	$	888,525.00	8%
USDA	$	368,646.00	3%
	$	**11,154,432.00**	98%

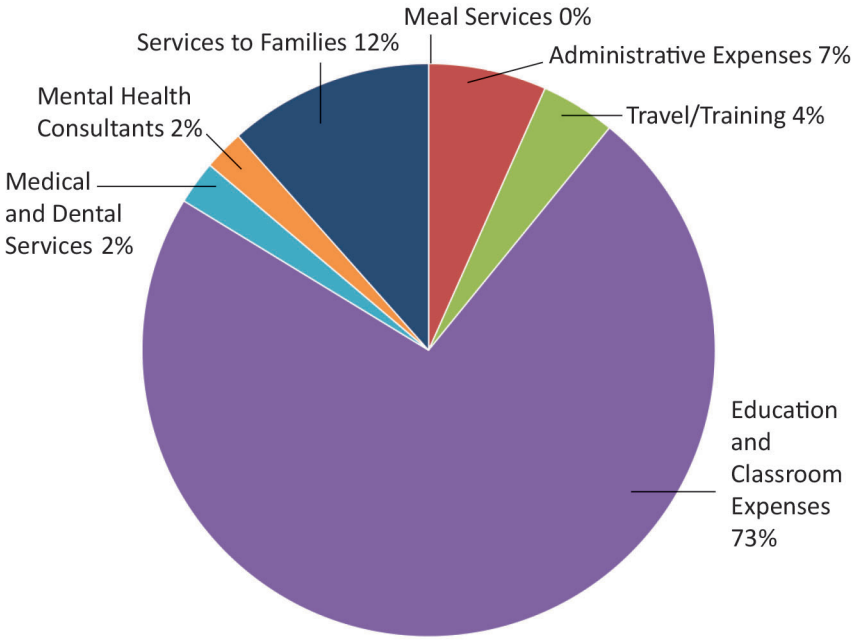
Average cost per child for FY (Expenses/760)	$	14,677.00
Average cost per Federal Awarded Slots for grant year 11/1/2019–10/31/20 (Award/297)	$	18,918.00
Average cost per State Awarded Slots for grant year 7/1/2019–6/30/20 (Award/463)	$	9,436.00

Grant Description – FY 2019

Federal Head Start Grant	$	5,508,907.00	47%
Oregon PreK Grant	$	4,231,264.00	37%
Portland Children's Levy	$	504,601.00	4%
Federal Title IA Grant	$	922,601.00	8%
USDA	$	520,365.00	4%
	$	**11,687,738.00**	100%

Average cost per child for FY (Expenses/785)	$	13,643.00
Average cost per Federal Awarded Slots for grant year 11/1/2018–10/31/19 (Award/322)	$	16,581.00
Average cost per State Awarded Slots for grant year 7/1/2018–6/30/19 (Award/463)	$	9,091.00

PPS Head Start Program 2021–2022 Projected Expenditures



Education and Classroom Expenses	73%
Services to Families	12%
Travel/Training	4%
Meal Services	0%
Administrative Expenses	7%
Medical and Dental Services	2%
Mental Health	2%

Past Monitoring Results

- PPS Head Start received a Federal Focus Area 1 review during the week of October 28, 2019. There were no findings. Our program was determined to be in compliance with all Head Start Program Performance Standards.
- Our program was reviewed in January, 2017 by Oregon Department of Education for compliance with CACFP regulations. We had one small finding in record keeping which was corrected.
- On the 2016 internal audit provided by the District's auditors three deficiencies not considered material weaknesses for the PPS Head Start program were found:
  1. The required semi-annual (425) report had inaccuracies with regard to the amount of local funds expended and the final 425 report was submitted late.
  2. Cash drawdowns included funds that are held by the District and paid out in July and August of each year. The funds should not have been drawn down since they were being held by the District and paid out later.
  3. Time and Effort Certifications were not completed in a timely manner.

These deficiencies have been addressed by the District and processes and procedures have been implemented to ensure that there will be no further findings in these areas.

Five-Year Goals — Year Three 2020–2021 PROGRESS

Program Goal 1: **PPS Head Start will ensure that all children are ready for success in kindergarten and beyond.**

Objectives	Expected 5-year Impact	Year 3 2020–21 Progress, Outcomes, and Challenges
All children will receive high quality educational experiences.	95% of all enrolled children will be at or above widely-held expectations in all domains.	Due to learning on-line (CDL), enrolled children have not been assessed using TS Gold. This goal may be carried over into next year. Using a new tool (DRDP). Identify trends by race, language, etc. Progress was made during PLC work addressing domains and Priority Standards for student growth. PLCs looked at data in new and different ways, especially without a standardized student assessment tool.
Children will be healthy and ready to learn.	80% of enrolled children will have attendance of 85% or greater. Systems are in place to ensure a safe, secure, healthy environment to support children's learning and development.	Covid protocols. Phone calls by FSW to support parents; needs, checking in mental health support. New safety protocols. Example: Covid Team Response, STT, cleaning procedures. Individualize attendance protocol for In-Person Instruction depending on family choice (CDL or In-Person). Attendance for CDL, SeeSaw, Dental Screenings, Daily Health Checks were monitored.
Increased individualized instruction and support	Improved outcomes for students with learning differences or behavior that is perceived as challenging by adults in the school and home setting. All students who attend at least 80% of the time and are eligible for Early Childhood Special Education services or receiving Mental Health consultation will show growth at all assessment points in the Social Emotional Domain.	Students with challenging behavior have mostly been underserved this year, due to lack of access in the classroom and families feeling too overwhelmed to access services. Students who were eligible for Early Childhood Special Education services continued to receive all support and services remotely and as we returned to in person instruction. Head Start staff participated in monthly collaboration meetings to identify and adapt classroom instruction. Individualized services were provided as indicated on the IFSP through parent and teacher coaching sessions. Service logs were regularly reviewed to ensure adequate service levels. Increased focus and practice on SEL during CDL lessons/ activities, feelings, emotions, trauma-informed lessons. Teachers were encouraged to create Professional Goals related to Social/Emotional Literacy for students. Reduced numbers supported the reduction of challenging behaviors. Some children prefer on-line learning, and less child contact. MECP has increased service time and levels of support based on student need. (In person and CDL). MECP was able to offer increased services to caregivers and children due to reduced enrollment.

Five-Year Goals — Year Three 2020–2021 Progress

Program Goal 2: **PPS Head Start will have strong communication systems throughout our organization.**

Objectives	Expected 5-year Impact	Year 3 2020–21 Progress, Outcomes, and Challenges
Program information will be shared regularly with families, staff and community partners.	All program communication systems will have a current written procedures and will be utilized and maintained regularly.	Emailing parents, texting, phone calls (all staff). Staff learning technology, parents learning new technology (everyone being willing to learn/grow). Online platforms that everyone needed to learn, Google Meets, Zoom, Seesaw, Remind, etc. Outreach to community partners/continued meetings. Teachers using Remind and/or ChildPlus more than prior years. Consistent check-ins with parents. Improve-consistent communication for all parents, in all languages (not dependent on teacher/FSW approach). Accessing all the available information is sometimes cumbersome. Teachers sharing lessons, activities, etc., with the entire teaching staff via google shared drive, emails, etc. Weekly Bulletin for *all* staff. Having remote meetings has increased participation and attendance. (Recommendation: consider continuing with some remote meetings).
Updated technology systems and training will be provided program-wide.	100% of staff will be trained regularly on devices and software relevant to their work.	Almost all staff received new and/or updated technology to deliver CDL services. Laptops and hotspots. All families received new tech and received some level of "training". Tablets, hotspots, headphones and keyboards. Hired part-time tech specialist to support staff and families during Covid. Hired Data Management Coordinator We may need more training on Google Suite. (Google docs, drives)

Five-Year Goals — Year Three 2020–2021 Progress

Program Goal 3: **PPS Head Start will ensure that the diversity of every child, family and staff member is valued and reflected in all program actions and decisions.**

Objectives	Expected 5-year Impact	Year 3 2020–21 Progress, Outcomes, and Challenges
Increase pathways and opportunities for parents to become employed with PPS Head Start.	Increase parent employment with PPS Head Start by 30%.	Connect with local colleges/community partners to improve in this area. One current parent was hired as a temporary FSW. English language classes at Clarendon—work to offer this at multiple locations. Provided PRAXIS for test taking and preparation available for interested families or staff.
Provide meaningful and relevant professional development for all PPS Head Start staff.	100% of staff will receive regular professional development related to their PPS Head Start responsibilities.	Weekly EA and part time EA trainings. Weekly teacher staff meetings. Monthly equity leadership; have a new contract with equity consultant. How are we embedding in all routines/meetings/instruction/family engagement?
Ensure that all children and families are receiving support to be healthy and ready to learn.	100% of families will receive information and follow up regarding healthcare and needed resources.	Challenges of Health Equity in pandemic reflected in decrease in number of well child visits. Progress: • FSW trained to identify barriers and provided opportunities and information, check on medical home being established. • New systems of communication with families to share resources. • Virtual parent meetings with HSAC MDs; sleep & bedtime; covid vaccination. Challenge: Electronic enrollment left gaps in family report of insurance, medical and dental home. Progress: System created on Change of Status form. Forms revised/reworded for next year.

Child Outcomes

PPS Head Start conducts assessment of children throughout the year to monitor developmental progress. While standardized assessments were not completed this past year due to the shift to Comprehensive Distance Learning of all services and supports, other alternative formative assessments were completed, however. These included staff observations of student learning, as well as student artifacts produced during synchronous and asynchronous learning opportunities. Teachers continued to meet in their Professional Learning Communities and use the data collected to inform their planning and teaching. These data analyses also enabled the program to monitor its progress on and update its 5-Year Program Goals and School Readiness Goals.

Community Partners

Portland Public Schools is actively involved in community planning to encourage strong communication, cooperation, and the sharing of information among agencies and their community partners. Head Start works diligently to improve the delivery of community services to children and families.

Partnerships are established within our school district between programs such as curriculum and instruction, student services, early childhood education, transportation, nutrition services, special education, English as a Second Language, technology services. City-wide partnerships are numerous and include health, social service and early childhood education organizations, colleges and universities, ESDs, the Oregon Zoo and more.

Many thanks to our numerous community partners, including—but not limited to—the following:

A Children's Place Bookstore
Albertina Kerr Center
Albina Early Head Start Family Center
Asthma & Allergy Foundation
Black Parent Initiative
Bradley Angle House
Bravo Youth Orchestra
CASA For Children
Casey Eye/OHSU/Elks Preschool Vision Program
Catholic Charities
Center for Family Success
Charles Smith, Charles Smith & Associates LLC
Childcare Resource & Referral
Children's Book Bank
Children's Community Clinic
Children's Museum
Common Bond
Community Energy Project
Columbia Regional Program
Community Immunization Clinic
Community Warehouse
Dental 3
DHS
Dougy Center
Early Learning Multnomah (ELM)
El Programa Hispano
Emanuel Hospital
Family and Community Together
Francis Center
Growing Gardens
Habitat for Humanity
Hacienda Community Development Corporation
Hispanic Access – Oregon Human Development Dept
Home Forward
Human Solutions
Immigration Counseling
Impact NW
IRCO Immigrant and Refugee Community Organization
JOIN
JUNTOS Together We Learn
La Clinica de Buena Salud
Lewis and Clark College
Lutheran Family Services
Mainspring
Metro Child Care and Referral
Morrison Center
Morrison Child & Family Services
Mt. Hood Head Start
Mt. Scott Community Center
Multnomah County Library—Every Child A Reader program
Multnomah Educational Service District (MESD)
Multnomah County Health Department (MCHD)
Multnomah Early Childhood Program (MECP)
MCHD Lead Screening Program
NARA Indian Health Clinic
NARA Wellness And Youth Center
National University of Natural Health Centers (NUNM)
Naturopathic Health Clinic
New Hope Baptist Church
North By Northwest Health Center
Northwest Children's Outreach
NW Primary Care Sellwood/Moreland
OHSU Doernbecher Children's Hospital
OHSU Richmond Family Clinic
OHSU Russell St. Dental Clinic
Operation Nightwatch / SE Hospitality Center
Operation Warm
Oregon Community Warehouse
Oregon Department of Education – Early Childhood Education
Oregon Episcopal School – Rebecca Siplak
Oregon Food Bank
Oregon Outreach
Oregon Pediatrics
Oregon State Extension Service
The Oregon Zoo
Portland Children's Levy
Portland Children's Museum
Portland Community College
Portland Firefighters Local 43
Portland Public Schools
Portland State University
Portland Winterhawks
PPS Early Childhood Special Education Services
PCC Metropolitan Workforce Training Ctr.
Pioneer United Methodist Church
PIVOT Job Corps Center
Portland Fire & Rescue
Planned Parenthood
Portland Children's Levy
Portland Housing Center
Portland Work Source SE
Project Dental Health
Providence Specialty Pediatric Dental Clinic
Providence Occupational Medicine
Reach Community Development
Rose Community Development
Rosewood Family Health
Russian Oregon Social Services
Salvation Army
Self Enhancement, Inc.
Shriners Hospital Social Work
Southeast Uplift
Swindells Resource Center,
The ARC of Multnomah County
University Park Dental
University of Portland – School of Education
Urban League Youth Family Services
US Marine Corps Toys for Tots
VOA Youth & Family Services
YMCA NE Community Center
YMCA SE Child Development Center

PORTLAND PUBLIC SCHOOLS

Head Start

Main Office

4800 NE 74th Ave
Portland, OR 97218
Phone: 503-916-5724
Fax: 503-916-2480
www.pps.net/headstart
www.pps.net/head-start

PPS Head Start Sites

Sacajawea (main office) • 503-916-5724

Applegate • 503-916-6294

Clarendon Early Learning • 503-916-6269

Creston Annex • 503-916-6219

Grout • 503-916-6711

Jason Lee • 503-916-5732

Kelly Center • 503-916-5759

Sitton • 503-916-3043

Whitman • 503-916-3010

PPS Head Start Management Team

Robert Cantwell, EdD
Director

Amparo Garcia-Yurchenco
Education Supervisor

Tamra Gowdy, EdD
Education Supervisor

Nalota Herms
Education Supervisor

Jason Roepel
Education Supervisor

Susan Fodell
Inclusion Manager

Rhiannon Martin
Family & Community Partnerships Manager

Paula Zaninovich
Mental Health Manager

Jean Borgerding
Nurse Consultant

Keely Moon
Nurse Consultant

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity, in any program or activity conducted or funded by USDA (not all bases apply to all programs). Remedies and complaint filling deadlines vary by program or incident.

Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotape, American Sign Language, etc.) should contact the responsible Agency or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program discrimination complaint, complete the USDA Discrimination Complaint Form, AD-3027, found online at How to File a Program Discrimination Complaint and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by: 1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Ave., SW, Washington, D.C. 20250-9410; 2) fax: (202) 690-7442; or (3) email: program.intake@usda.gov.

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PPS Head Start

OREGON HEAD START ASSOCIATION

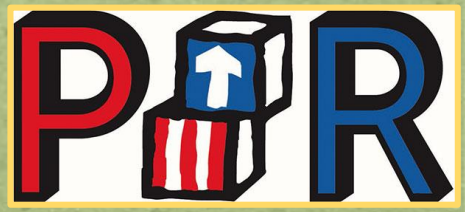
portland children's levy
Investing in our future

OREGON DEPARTMENT OF EDUCATION
Oregon achieves . . . together!

Head Start
Portland Public Schools

2020-2021

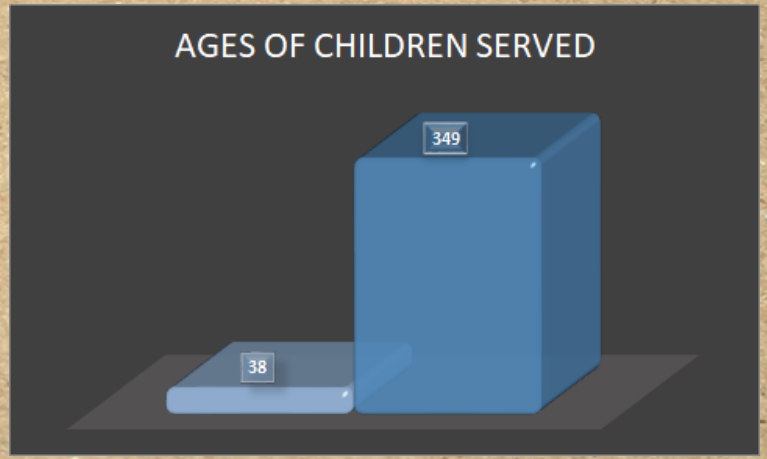
Annual Program Information Report (PIR)



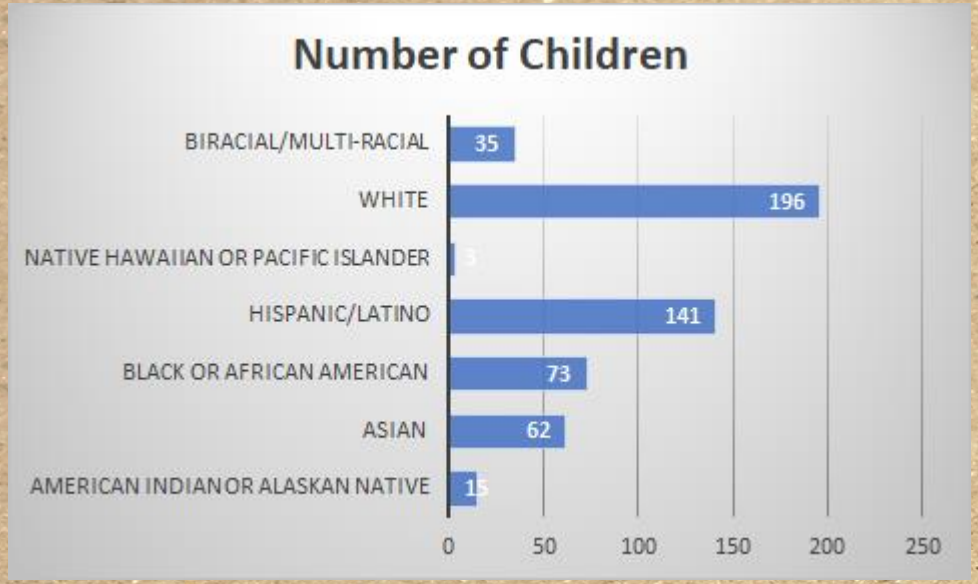
The Office of Head Start (OHS) Program Information Report (PIR) provides comprehensive data on the services, staff, children and families served by Head Start programs nationwide. All grantees and delegates are required to submit the PIR annually.

Ages We Served

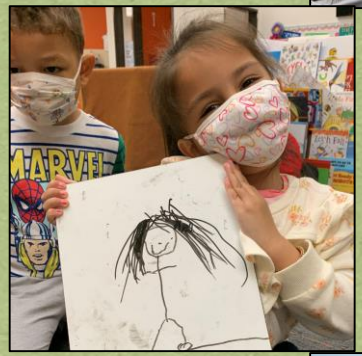
3 years old	38
4 years old	349



Race and Ethnicity



*Some students are represented in more than one category



Primary Language Spoken in Homes

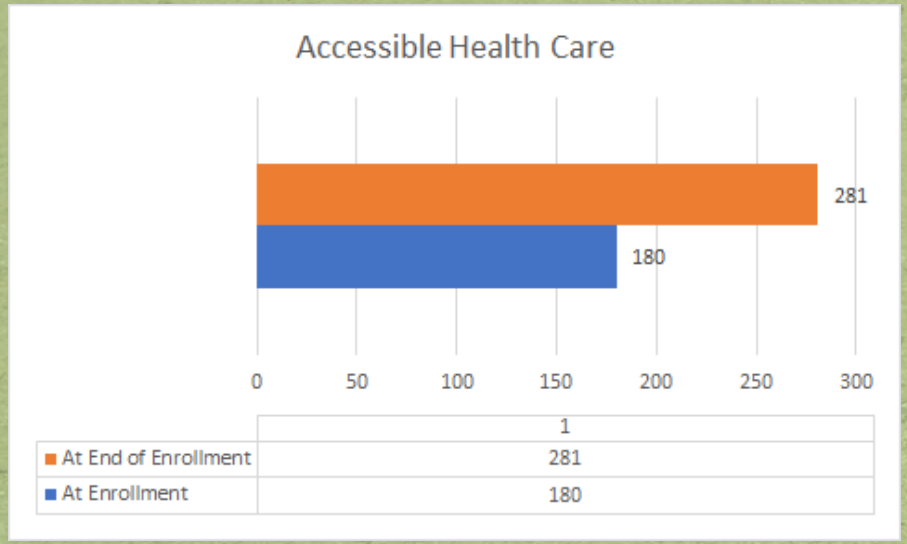
Primary Language in Home	Number of Students
English	221
Spanish	89
Native Central American	4
Caribbean Languages	1
Middle Eastern & South Asian	5
East Asian	48
Pacific Island	1
European/Slavic	6
African	6
Unspecified	8

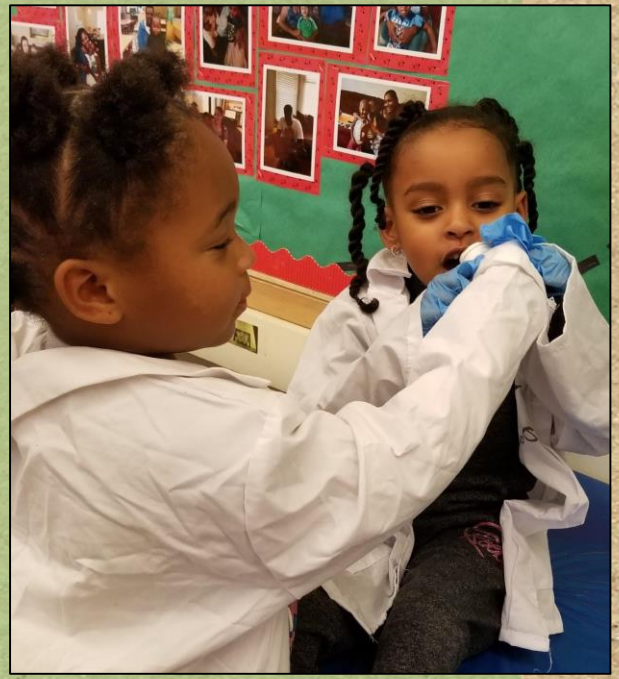
Individual Family Service Plan (IFSP)

75 children (21%) in the program had an Individual Family Service Plan indicating they were deemed eligible to receive special education and related services.

Accessible Health Care

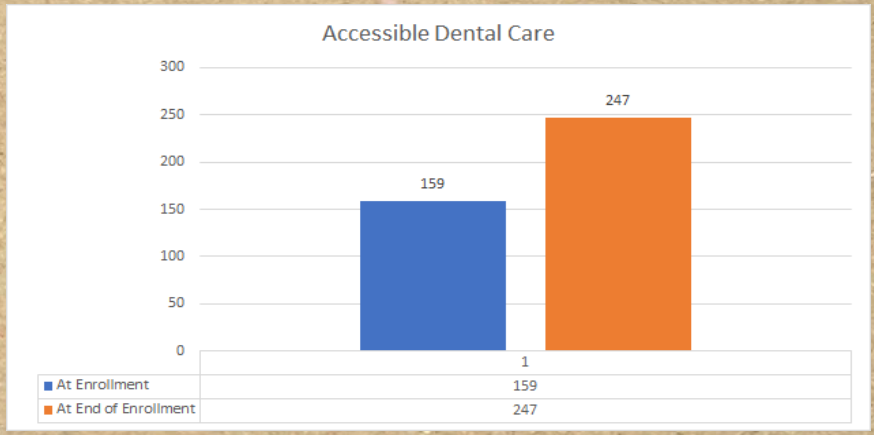
Accessible Health Care defined as: Ongoing source of continuous, accessible health care provided by a healthcare professional that maintains the child's ongoing health record and is not primarily a source of emergency or urgent care.





Accessible Dental Care

Number of children with continuous, accessible dental care provided by an oral healthcare professional which included access to preventative care and dental treatment.



Family Engagement

228 families received at least one program service to promote positive family outcomes.
Some of the areas include:

- Emergency need for food, clothing or shelter
- Mental health services
- Substance misuse prevention and/or treatment
- Research based parenting curriculum
- Support in adult education, job training and ESL training
- Health education (nutrition, preventative services, tobacco use)
- Assistance to families of incarcerated individuals

WELCOME
BACK
REOPEN

Head Start
Portland Public Schools

We would like to thank all of you for your commitment to Head Start.

PIR

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PORTLAND PUBLIC SCHOOLS
Head Start Program
4800 NE 74th Avenue
Portland, OR 97218
503-916-5724• Fax: 503-916-2670

HEAD START PROGRAM

Kathy Schuknecht
Regional Program Manager
Office of Head Start

Subject: PPS Head Start 2020-2021 Program Annual Report

Dear Ms. Kathy Schuknecht,

Portland Public Schools Head Start Governing Board has approved PPS Head Start's 2020-2021 Program Annual Report.

The signature below is confirmation the Head Start Governing Board has approved this request.

Thank you.

Head Start Director — Date 11/16/2021

Governing Board Chair — Date

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Kathy Schuknecht
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Subject: 2020-2021 Program Annual Report

Dear Ms. Kathy Schuknecht,

Portland Public Schools Head Start Policy Council has approved the program's 2020-2021 Program Annual Report.

The signature below is confirmation the Head Start Policy Council has approved this request.

Thank you,

Head Start Director — Date: 11/17/2021

Policy Council Chair — Date: 11/29/2021

Portland Public Schools is an equal opportunity educator and employer.

PORTLAND PUBLIC SCHOOLS
OFFICE OF Head Start/Early Learners
501 North Dixon Street / Portland, OR 97227
Telephone: (503) 916-5724

Date: December 3, 2021

To: PPS School Board

From: Dr. Emily Glasgow, Interim Senior Director of PK-5 Core Academics
Dr. Robert D. Cantwell, Principal/Director of Head Start

Subject: Head Start Action and Informational Items

BACKGROUND

A. Federal requirements call for the Governing Board of Head Starts to approve recommendations and reports for the program.

B. The Board of Directors for Portland Public Schools serves as the Governing Board for PPS Head Start.

1. 2020-2021 Program Annual Report

The Head Start Program Performance Standards provide requirements and procedures for the Annual Report. The Annual Report includes yearlong information regarding Head Start program data. It is used as a community resource and contains information from the PIR. Program budget information is also shared in the annual report. PPS Head Start Parent Policy Council approved the 2020-2021 Program Annual Report on November 9, 2021. A Board Letter of Approval is requested.

2. 2021-2022 PPS Head Start Self-Assessment Timeline

Board approval of the annual Self-Assessment Timeline is required. The annual Self-Assessment is a central tenet of continuous quality improvement for Head Start programs. The goal of the Self-Assessment is to meet Head Start Program Performance Standards and move toward program excellence in serving children and families. The process provides programs the means to regularly assess their own management systems and program operations in order to continually strengthen the program and the services and supports delivered to children and families. PPS Head Start Parent Policy Council approved the 2021-2022 Self-Assessment Timeline on November 9, 2021. A Board Letter of Approval is requested.

3. 2021-2022 PPS Head Start School Readiness Goals

The Head Start approach to school readiness means that children are ready for school, families are ready to support their children's learning, and schools are ready for children. Physical, cognitive, social, and emotional development are all essential ingredients of school readiness. Head Start views school readiness as children possessing the skills, knowledge, and attitudes necessary for success in school and for later learning and life. Programs must establish school

readiness goals that are appropriate for the ages and development of enrolled children in the following domains: Approaches to Learning, Social and Emotional Development, Language and Literacy, Cognition, and Perceptual, Motor, and Physical Development. Implementing and measuring progress toward school readiness goals helps programs individualize for each child and ensure that children know and can do what is needed to be ready for kindergarten. Head Start respects parents as their children's primary nurturers, teachers, and advocates, and programs are required to consult with parents in establishing school readiness goals. As children transition to kindergarten, Head Start programs and schools should work together to promote school readiness and engage families. PPS Head Start Parent Policy Council approved the 2021-2022 School Readiness Goals on November 9, 2021. A Board Letter of Approval is requested.

4. PPS Head Start Lice Policy

Board approval of new policies is required. According to Head Start Program Performance Standard 1302.40(a), A program must provide high-quality health, oral health, mental health, and nutrition services that are developmentally, culturally, and linguistically appropriate and that will support each child's growth and school readiness. The Office of Head Start states that policies should not be established that require staff or children to be nit-free before returning because these policies do not prevent the spread of lice. They needlessly exclude children from care and cause unwarranted and excessive burdens on families. Instead, a prevention and treatment approach should be adopted. PPS Head Start, under the guidance of its program nurses, has developed a procedural flowchart to address the presence of lice. PPS Head Start Parent Policy Council approved the Lice Management Procedures on November 9, 2021. A Board Letter of Approval is requested.

5. 2020-2021 PPS Head Start Program Information Report (PIR)

The annual Program Information Report provides comprehensive data on the services, staff, children, and families served by Head Start. All grantees are required to submit a PIR each year. The PIR is an important source of descriptive and service data for the Head Start community, their partners, Congress, and for the general public. PIR data is compiled for use at the federal, regional, state, and local levels. The PIR was shared with the PPS Head Start Parent Policy Council on November 9, 2021. This report is for the Governing Body's information only. Governing Body approval is not required.

RELATED POLICIES/BEST PRACTICES

Items listed above are required to be reviewed, updated, and/or approved by the Parent Policy Council and Governing Board.

ANALYSIS OF SITUATION

All items listed above support the high quality, comprehensive wraparound services provided to the children and families attending PPS Head Start.

FISCAL IMPACT

1. There is no known fiscal impact of these items. Continued federal funding of PPS Head Start is dependent upon compliance with Head Start Program Performance Standards, which includes requesting approval of recommendations and reports from the program's governing bodies.

COMMUNITY ENGAGEMENT (IF APPLICABLE)
PPS Head Start Parent Policy Council reviewed, provided input, and approved these actions/documents on November 9, 2021 as noted above and as reflected in the attached meeting minutes.

TIMELINE FOR IMPLEMENTATION / EVALUATION
The timeline for implementation will be the 2021-2022 school year.

BOARD OPTIONS WITH ANALYSIS
Board approval needed.

CONNECTION TO BOARD GOALS
The goal of PPS Head Start is to prepare the city's diverse and resilient young children for successful transitions to kindergarten and beyond by leveraging each child's strengths, building their social competence, and developing school readiness skills.

Portland Public Schools' vision is this: Every student, every teacher, and every school succeeding. The school district's mission is that every student by name is prepared for college, career, and participation as an active community member, regardless of race, income, or zip code. The Board adopted the following four priorities for the 2018-19 school year to move the school district toward the above aspirations:

- Set a clear vision and strategic plan.
- Create equitable opportunities and outcomes for all students.
- Build management accountability systems and structures.
- Allocate budget, funding, and resources focused on improving outcomes for students.

All of the above items support the district's and School Board's vision and priorities.

STAFF RECOMMENDATION
Develop Board resolutions and obtain signature approval of the Board Chair of the attached documents.

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

(Initials)

ATTACHMENTS

A. 2020-2021 Program Annual Report
B. 2020-2021 Program Annual Report Board Resolution
C. 2020-2021 Program Annual Report Governing Body Approval Letter
D. 2020-2021 Program Annual Report Policy Council Approval Letter

E. 2021-2022 Self-Assessment Timeline
F. 2021-2022 Self-Assessment Timeline Board Resolution
G. 2021-2022 Self-Assessment Timeline Governing Body Approval Letter
H. 2021-2022 Self-Assessment Timeline Policy Council Approval Letter
I. 2021-2022 School Readiness Goals
J. 2021-2022 School Readiness Goals Board Resolution
K. 2021-2022 School Readiness Goals Governing Body Approval Letter
L. 2021-2022 School Readiness Goals Policy Council Approval Letter
M. Lice Management Procedures Flow Chart
N. Lice Management Procedures Board Resolution
O. Lice Management Procedures Governing Body Approval Letter
P. Lice Management Procedures Policy Council Approval Letter
Q. 2020-2021 Program Information Report (PIR)
R. 11.9.21 PIR PowerPoint
S. 11.9.21 PPS Head Start Parent Policy Council Meeting Minutes

RESOLUTION No. 6416

Approval of Head Start Policy Council Recommendation

RECITALS

A. Federal requirements call for the Governing Board of a Head Start program to approve recommendations for the program.

B. The Board of Directors for Portland Public Schools serves as the Governing Board for the PPS Head Start Program.

C. Portland Public Schools Policy Council recommends the approval of the 2021-2022 PPS Head Start Self-Assessment Timeline. The annual Self-Assessment is a central tenet of continuous quality improvement for Head Start programs. The goal of the Self -Assessment is to meet Performance Standards and move toward program excellence in serving children and families. The process provides programs the means to regularly assess their own management systems and program operations in order to continually strengthen the program and the service delivered to children and families.

RESOLUTION

The Board of Directors for Portland Public Schools, School District No. 1J, Multnomah County, Oregon, approves the Head Start Policy Council recommendations as stated above.

PPS Head Start
Self-Assessment Timeline

2021-2022 Year 4

November 2021

- Policy Council Approval of Self-Assessment Timeline and Process
- Formation of Self-Assessment Committee

December 2021 - May 2022

- Managers and Self-Assessment Committee review Performance Standards regarding achieving program goals
- Review Year 4 of 5-year goals and objectives
- Review program data to assess achievement toward goals (through end of year)
- Continue service area data gathering (through end of year)
- Analyze collected service area/program data (through end of year)
- Quarterly summary of ongoing monitoring results

April - May 2021

- Staff and Parent Interviews (parent drop-ins, surveys)
- Update Community Needs Assessment
- Create Year 5 of 5-Year Program Goals and Objectives based on Self-Assessment and Community Needs Assessment findings
- Review and update Program Management, Planning, and Oversight Systems document (formerly known as Program Systems and Planning Document)

June 2021

- Complete Self-Assessment Report and recommendations
- Policy Council review and approve program planning documents

PORTLAND PUBLIC SCHOOLS
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4800 NE 74th Avenue
Portland,OR 97218
503-916-5724• Fax: 503-916-2670

HEAD START PROGRAM

Kathy Schuknecht
Regional Program Manager
Office of Head Start

Subject: PPS Head Start 2021-2022 Self-Assessment Timeline

Dear Ms. Kathy Schuknecht,

Portland Public Schools Head Start Governing Board has approved PPS Head Start's 2021-2022 Self-Assessment Timeline.

The signature below is confirmation the Head Start Governing Board has approved this request.

Thank you.

Head Start Director — Date 11/16/2021

Governing Board Chair — Date

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Head Start Program
4800 NE 74th Avenue• Portland,OR 97218
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Kathy Schuknecht
Regional Program Manager
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OFFICE OF Head Start/Early Learners
501 North Dixon Street / Portland, OR 97227
Telephone: (503) 916-5724

Date: December 3, 2021

To: PPS School Board

From: Dr. Emily Glasgow, Interim Senior Director of PK-5 Core Academics
Dr. Robert D. Cantwell, Principal/Director of Head Start

Subject: Head Start Action and Informational Items

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Board approval of new policies is required. According to Head Start Program Performance Standard 1302.40(a), A program must provide high-quality health, oral health, mental health, and nutrition services that are developmentally, culturally, and linguistically appropriate and that will support each child's growth and school readiness. The Office of Head Start states that policies should not be established that require staff or children to be nit-free before returning because these policies do not prevent the spread of lice. They needlessly exclude children from care and cause unwarranted and excessive burdens on families. Instead, a prevention and treatment approach should be adopted. PPS Head Start, under the guidance of its program nurses, has developed a procedural flowchart to address the presence of lice. PPS Head Start Parent Policy Council approved the Lice Management Procedures on November 9, 2021. A Board Letter of Approval is requested.

5. 2020-2021 PPS Head Start Program Information Report (PIR)

The annual Program Information Report provides comprehensive data on the services, staff, children, and families served by Head Start. All grantees are required to submit a PIR each year. The PIR is an important source of descriptive and service data for the Head Start community, their partners, Congress, and for the general public. PIR data is compiled for use at the federal, regional, state, and local levels. The PIR was shared with the PPS Head Start Parent Policy Council on November 9, 2021. This report is for the Governing Body's information only. Governing Body approval is not required.

RELATED POLICIES/BEST PRACTICES

Items listed above are required to be reviewed, updated, and/or approved by the Parent Policy Council and Governing Board.

ANALYSIS OF SITUATION

All items listed above support the high quality, comprehensive wraparound services provided to the children and families attending PPS Head Start.

FISCAL IMPACT

1. There is no known fiscal impact of these items. Continued federal funding of PPS Head Start is dependent upon compliance with Head Start Program Performance Standards, which includes requesting approval of recommendations and reports from the program's governing bodies.

COMMUNITY ENGAGEMENT (IF APPLICABLE)
PPS Head Start Parent Policy Council reviewed, provided input, and approved these actions/documents on November 9, 2021 as noted above and as reflected in the attached meeting minutes.

TIMELINE FOR IMPLEMENTATION / EVALUATION
The timeline for implementation will be the 2021-2022 school year.

BOARD OPTIONS WITH ANALYSIS
Board approval needed.

CONNECTION TO BOARD GOALS
The goal of PPS Head Start is to prepare the city's diverse and resilient young children for successful transitions to kindergarten and beyond by leveraging each child's strengths, building their social competence, and developing school readiness skills.

Portland Public Schools' vision is this: Every student, every teacher, and every school succeeding. The school district's mission is that every student by name is prepared for college, career, and participation as an active community member, regardless of race, income, or zip code. The Board adopted the following four priorities for the 2018-19 school year to move the school district toward the above aspirations:

- Set a clear vision and strategic plan.
- Create equitable opportunities and outcomes for all students.
- Build management accountability systems and structures.
- Allocate budget, funding, and resources focused on improving outcomes for students.

All of the above items support the district's and School Board's vision and priorities.

STAFF RECOMMENDATION
Develop Board resolutions and obtain signature approval of the Board Chair of the attached documents.

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

(Initials)

ATTACHMENTS

A. 2020-2021 Program Annual Report
B. 2020-2021 Program Annual Report Board Resolution
C. 2020-2021 Program Annual Report Governing Body Approval Letter
D. 2020-2021 Program Annual Report Policy Council Approval Letter

E. 2021-2022 Self-Assessment Timeline
F. 2021-2022 Self-Assessment Timeline Board Resolution
G. 2021-2022 Self-Assessment Timeline Governing Body Approval Letter
H. 2021-2022 Self-Assessment Timeline Policy Council Approval Letter
I. 2021-2022 School Readiness Goals
J. 2021-2022 School Readiness Goals Board Resolution
K. 2021-2022 School Readiness Goals Governing Body Approval Letter
L. 2021-2022 School Readiness Goals Policy Council Approval Letter
M. Lice Management Procedures Flow Chart
N. Lice Management Procedures Board Resolution
O. Lice Management Procedures Governing Body Approval Letter
P. Lice Management Procedures Policy Council Approval Letter
Q. 2020-2021 Program Information Report (PIR)
R. 11.9.21 PIR PowerPoint
S. 11.9.21 PPS Head Start Parent Policy Council Meeting Minutes

RESOLUTION No. 6421

Acceptance of the Long-Range Facility Plan

RECITALS

A. In September 2020, the Portland Public Schools began a long-range facility planning effort. This planning effort is an update of the 2012 Long-Range Facility Plan.

B. The 2021 Long-Range Facility Plan synthesizes three primary considerations: educational program vision, enrollment and capacity, and facility condition. These considerations are guided by the community-developed vision, Portland Public Schools reImagined, which was established by the District and informed by input from the broader District community. In addition to the District's vision, the Long-Range Facility Plan is grounded in, and developed in coordination with the District's 2021-2025 Strategic Plan for Racial Equity, Inclusion, and Excellence, the PPS Racial Equity and Social Justice Lens, the Portland Public Schools Energy & Sustainability Standards, the Middle School Redesign, the draft ADA Transition Plan and a community proposed Climate Crisis Response plan.

C. Community voice was central throughout the process, and continued dialogue with community members will be essential to the plan's success. Outreach to understand the perceptions, experiences, and aspirations of diverse groups of District stakeholders included students, teachers, parents, and community members. A racial equity model of inquiry was used to illuminate the diverse perceptions and experiences of our community.

D. Student input was sought through close coordination with District elementary, middle and high school teachers, and other student groups. Affinity groups were organized to enable groups of people to come together around common social identities, including race and cultural backgrounds, fostering a sense of comfort in sharing stories and generating ideas for long-range facility planning efforts. These approaches supported inclusive engagement through empowering the voice of historically excluded or tokenized communities in traditional outreach methods.

E. The community outreach plan included 13 community dialogue sessions and two classroom sessions conducted in early 2021. The District actively recruited participants for these sessions via the District's website, email listservs, community newsletters, and social media posts. Additionally, key organizations received personalized invitations to contribute to the process, including the District's RESJ partners. Across all of the dialogue sessions, 51% of participants were BIPOC, and 31% of participants were middle or high school students. Finally, the District collected multiple online surveys and leadership interest forms via the District website.

F. All large school districts in Oregon are required to complete a Long-Range Facility Plan every ten years.

G. The Long-Range Facility Plan will be used to plan for future capital improvements within the context of current educational vision and student enrollment trends over the next 10 to 15 years and provides a strategic framework to be tested against community voice and vision prior to future bond campaigns.

RESOLUTION

1. The Board affirms the premise of the plan and its alignment with the District's vision of Portland Public Schools reImagined and the 2021-2025 Strategic plan for Racial Equity, Inclusion and Excellence.

2. The Board affirms the goals, guiding principles and methodologies of the 2021 Long-Range Facility Plan as the basis for planning capital investments in District facilities and future bond planning.

3. The Board of Education extends its sincere gratitude to everyone who gave their time, energy, and ideas to this Long-Range Facility Plan, and the community outreach, which elevated the voices of communities of color and student voices using a Racial Equity and Social Justice Lens. The contributions of so many diverse individuals from across the community, including District leadership, teachers, parents, and other community members, helped create a Plan that reflects the needs and aspirations of the Portland Public Schools and its community.

4. The Board hereby accepts the 2021 Long-Range Facility Plan as recommended by the Superintendent.

2021

LONG-RANGE FACILITY PLAN

VOLUME 1: SYSTEM OVERVIEW

PORTLAND PUBLIC SCHOOLS

2021 11 22 - BOE REVIEW DRAFT

This plan addresses the provisions of OAR 581-027-0040, Long-Range Facility Plan Requirements, and Section 5 of ORS 195.110, School Facility Plan for Large School Districts.

BRIC ARCHITECTURE

PPS

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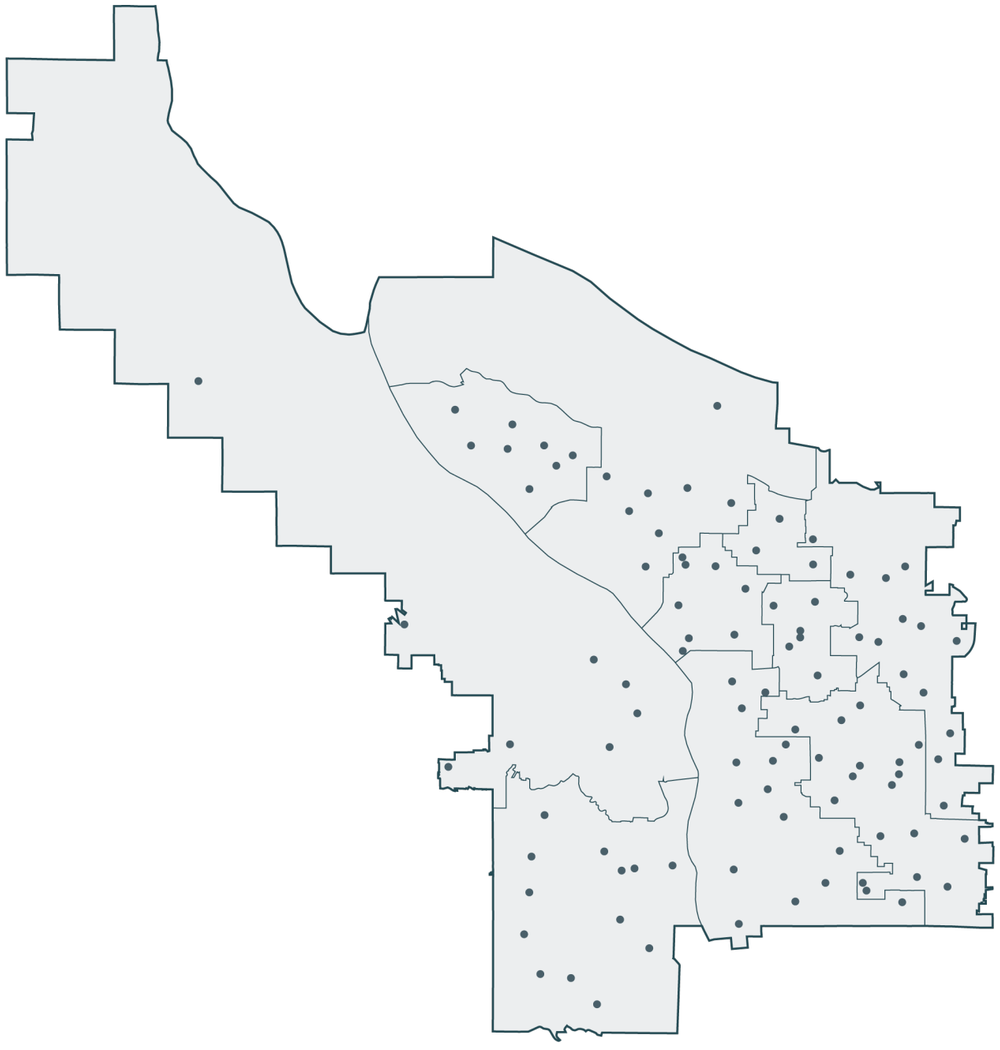
PORTLAND PUBLIC SCHOOLS



INTRODUCTION TO THE DISTRICT

Portland Public Schools ("the district") is the largest school district in Oregon, with more than 47,000 students and more than 90 sites. The district is the second-largest property owner in Portland and one of the region's largest employers.

THE DISTRICT BY THE NUMBERS

This is a document about buildings. The data below is intended to provide a general orientation to the district's real estate. Recognizing, also, there's nothing static about our buildings, this data should be verified, updated, and vetted regularly. Renovations, configuration changes, and program movement are ongoing as of this writing. Our buildings are constantly influx to meet the changing needs of our educators, students, and the broader community.

+9M **Square Feet of Building Area** Area data: min 16,000 sqft; max 420,000 sqft; average 90,000 sqft; total 9,118,000 sqft

3 **Early Learning Schools** Area data: min 18,700 sqft; max 47,000 sqft; average 29,000 sqft; total 87,000 sqft

45 **Elementary Schools** Area data: min 15,500 sqft; max 108,600 sqft; average 64,000 sqft; total 2,900,000 sqft

11 **K-8 Schools** Area data: min 16,000 sqft; max 171,000 sqft; average 62,000 sqft; total 744,000 sqft

15 **Middle Schools** Area data: min 74,000 sqft; max 219,000 sqft; average 99,000 sqft; total 1,492,000 sqft

9 **High Schools** Area data: min 257,000 sqft; max 371,000 sqft; average 303,000 sqft; total 2,729,000 sqft

5 **Alternative Schools** Area data: min 27,000 sqft; max 274,000 sqft; average 70,000 sqft; total 190,000 sqft

12 **Leased, Swing, & Admin Sites** Area data: min 16,000 sqft; max 420,000 sqft; average 85,000 sqft; total 970,000 sqft

Data from the 2021–2022 school year

PARTICIPANTS

CORE TEAM

STAFF	ROLE
Judy Brennan	Director of Enrollment & Transfer
Isaac Cardona	Area Senior Director
Marina Cresswell	Sr. Director, Office of School Modernization
Jonathan Garcia	Chief of Staff
Marshall Haskins	Sr. Director of Athletics
Dan Jung	Chief Operating Officer
Patrick LeBoeuf	Director of Projects & Construction
Meisha Plotzke	Director of Middle School Redesign
Dana White	Director of Planning & Real Estate
Don Wolff	Chief Technology Officer

CRIT COALITION

PARTICIPANTS		
Fartun Abdi	Parker Myrus	Margot Walker
Molly Anderson	Katie Nations	Jackson Weinberg
Kerri Babin	Lisa Newlyn	Lilly Windle
Amanda Burnham	Lana Pierce	Jill Vog
Abby Dacey	Alejandra Rivas	
Emon Ghassemi	Regina Sackrider	
Rhonda Rene Gray	Yian Saechao	
Octavio Gutierrez	Jackie Santa Lucia	
Andrew Haley	Joanne Shepard	
Anyika Nicole Hopson	Kim Stave	
Sheryl Moren	Carmella Thomas	
Sage Sol Morgillo	Valeria Judith Vollmer-Rendon	

ACADEMIC PROGRAM INTERVIEW PARTICIPANTS

STAFF	ROLE
Nicole Accuardi	TOSA: Arts
Laura Authur	TOSA: Arts
Kristen Brayson	Academic Programs Administrator - VAPA
Margaret Calvert	Area Senior Director
Carolina Cano	Assistant Director - CTE
Isaac Cardona	Area Senior Director
Patricia Curley	Assistant Director of Special Education
Carolyn Drake	TOSA: Arts
Kathleen Ellwood	Area Senior Director
Molly Emmons	Director of Security Services
Emily Glasgow	Director of Academic Programs: Early Learners
Marshall Haskins	Sr Director of Athletics
Aurora Hymel	Sr Director of College & Career Readiness
Diallo Lewis	Asst Director of Athletics
Kristin Lieheimer	Assistant Director of Special Education
Jeremy Lo	Academic Programs Administrator - SPED
Mary Mertz	Sr Director of Special Education
Michelle Murer	Assistant Director of Special Education
Jan Osborn	Director of College & Career Readiness
Jeff Peeler	Asst Director of Athletics
Meisha Plotzke	Director of Middle School Redesign
Elisa Schorr	Area Senior Director
Adam Shaw	Security Operations Manager
Kristyn Westphal	Area Senior Director
Jenny Withycombe	Academic Programs Administrator - PE
Korinna Wolfe	Area Senior Director

The project team would like to extend their sincere gratitude to everyone who gave their time, energy, and ideas to this Long-Range Facility Plan. The contributions of so many diverse individuals from across the community, including district leadership, teachers, parents, and other community members, helped create a Plan that reflects the needs and aspirations of the Portland Public Schools and its community. **Forward Together.**

EXECUTIVE SUMMARY

PURPOSE & USE

REGULATORY BACKGROUND

In September 2020, the Portland Public Schools began a long-range facility planning effort. BRIC Architecture was selected to facilitate this process and assist with preparation of the plan. This planning effort is an update of the 2012 Long-Range Facility Plan developed by Mahlum and the district.

All large school districts in Oregon are required to complete a Long-Range Facility Plan every ten years. The purpose of the document is to plan for future capital improvements within the context of current educational vision and student enrollment trends over the next 10 to 15 years. The plan provides a strategic framework to be tested against community voice and vision prior to future bond campaigns.

This plan synthesizes three primary considerations: educational program vision, enrollment and capacity, and facility condition. These considerations are guided by a strategic vision established by the district and informed by input from the broader district community. This Long-Range Facility Plan is grounded in, and developed in coordination with, the district's values as articulated across the following documents and initiatives:

- Portland Public Schools reImagined
- Forward Together: 2021–2025 Strategic Plan for Racial Equity, Inclusion, and Excellence
- PPS Racial Equity and Social Justice Lens
- Portland Public Schools Energy & Sustainability Standards
- PPS Climate Crisis Response Policy [Emerging]
- ADA Transition Plan
- Middle School Redesign

The plan also addresses the requirements of OAR 581-027-0040, Long-Range Facility Plan Requirements, and Section 5 of ORS 195.110, School Facility Plan for Large School Districts. In doing so, this plan creates a framework for future bond-planning efforts, reflects community values, and targets alignment with community capital support.

THIS IS A LIVING DOCUMENT

This document falls within a sequence of steps recommended by the state before capital Bond planning. Preceding this document is a multi-year facility condition assessment and enrollment forecasts outlining student population trends for the next fifteen (15) years. Building on these efforts, this plan documents capital forecasts in the context of educational vision, building condition, and building capacity.

Many steps remain before a capital measure can be referred to the voters. It is essential to recognize that this document does not make commitments that will require future Board action or make specific recommendations for future Bonds.

As such, the contents of this document are primarily informational. The facility condition and enrollment forecasts are presented without specific recommendations.

Recommendations, where they exist in this document, were developed in collaboration with district academic program leaders (section: Program Forecasts) and the CRiT Coalition (section: Planning Principles). These recommendations provide the foundation for future dialogue around academic program vision and the district's vision for the built environment.

Figure 1 below presents the most recent Bond broken down by spending category. Modernizations constitute the largest spending category, followed by facility improvements, educational improvements, and administration and contingency.

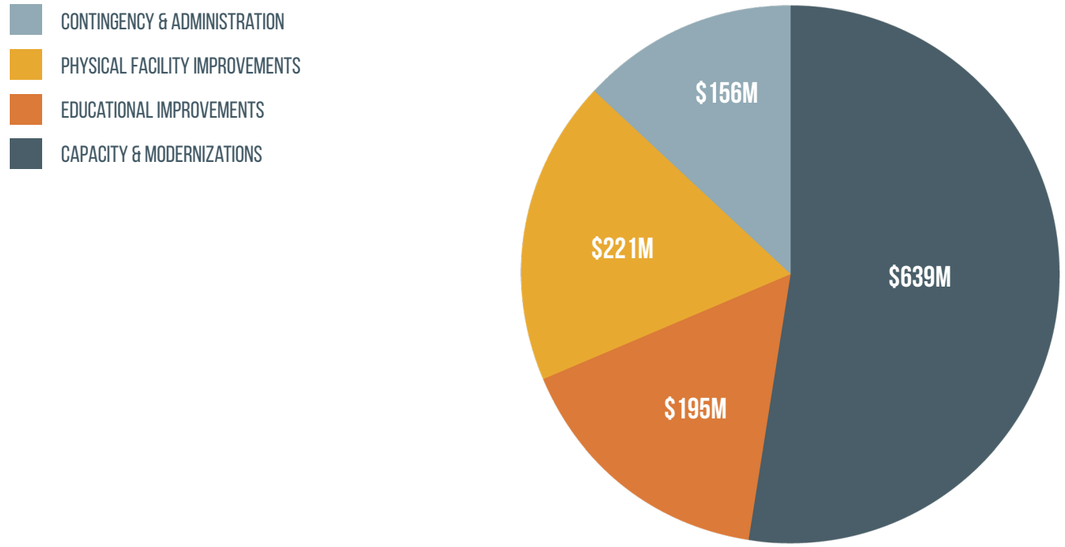


FIGURE 1 2020 GENERAL OBLIGATION BOND CATEGORIES

This document offers information on all major categories but does not outline specific project scopes or timelines. Further study is necessary to determine project feasibility within the future budget parameters.

Projects and priorities within the 2020 Bond or other immediate district efforts are similarly not within the purview of this document. Instead, this document assumes a mid-to-long-view, forecasting at the soonest four years from this writing.

Budgets also are not discussed herein in any detail. Future Bond planning committees must base all decisions in the context of the district bonding capacity, market capacity, and community support.

JOURNEY MAP

This journey map depicts the timeline and planning sequence beginning fall 2018, leading to a future capital bond measure referred to Portland voters. Many steps remain before the next bond. This document is intended to provide a framework to be tested against community voice and vision during future bond planning.

The State of Oregon outlines the specific requirements of this Long-Range Facility Plan, including an analysis of enrollment forecasts relative to building capacity, building condition, and educational vision. In addition, this document is rooted in the district's commitment to Racial Equity and Social Justice; practices and policies shaping the built environment are active agents in the district's value system and the most public expression of our theory of action.

This Long-Range Facility Plan focuses on buildings and space but was developed in concert with the district's broader vision.

Educational Suitability Assessments

The educational suitability assessments gathered information about how well spaces meet the facility needs for the program offered as compared against the district's 2017 Ed Specification. The reports include each instructional space (e.g., various types of classrooms for music, art and general education, specialized learning, etc.), common spaces (e.g., administration, cafeteria, library, etc.), outside spaces (e.g., play and athletic fields, parking, etc.) and security items (e.g., entrances, lighting and signage).

The data show that many schools need improvement. The specific outcomes are documented in the final section of this Long-Range Facility Plan.

Facility Condition Assessment

This assessment was a comprehensive study of facility conditions district-wide.

The objective of the assessments were to:

- Calculate Facility Condition Index (FCI) Scores for buildings, including FCI scores for individual systems.
- Prioritize building systems based on need, observed deficiencies, remaining useful life, and classify each system based on a recommended timeframe for replacing these systems.
- Update previous Americans with Disabilities Act (ADA) Accessibility studies.

Following the assessments, a recommended corrective action for each observed deficiency was developed. If an action was required within four years, remedial repairs were priced and given a severity category and priority.

Portland Public Schools reImagined

An expansive, community-driven visioning process focused on what we want to be true for our graduates.

The district's vision is a journey of ongoing creativity, learning, and improvement, and its boldness can speed progress by inspiring action and collaboration.

A graduate of Portland Public Schools will be a compassionate, critical thinker, able to collaborate and solve problems, and be prepared to lead a more socially just world.

Enrollment Forecasts

Enrollment forecasts were prepared by the Portland State University Population Research Center for Portland Public Schools. These data are based on enrollment numbers from October 2020 and forecast through 2036. The 15-year enrollment forecast integrates district enrollment trends with local area population, enrollment, and housing trends.

This information is intended to be used as a school planning tool and a basis for community discussions about future school facility needs.

Primary data sources used to prepare these forecasts include historic enrollments through 2020-21, U.S. Census Bureau 2000 and 2010 Decennial Censuses and 2015 to 2019 American Community Survey, birth data from the Oregon Center for Health Statistics, and housing development information from the City of Portland and Metro.

Dialogue Sessions

As part of the initial outreach for Long-Range Facility Plan, the goal of the dialogue sessions was to understand the perceptions, experiences, and aspirations of diverse groups of district stakeholders, including students, teachers, parents, and community members.

Fundamental to this goal is the idea that individuals' lived experiences - specifically, the lived experiences of people who, by virtue of race or disability, are often marginalized from the center of our storytelling - are vital forms of evidence in understanding the function of space.

2018 | 2019 | 2020 | 2021

Academic Program Leader Interviews

The Long-Range Facility Plan project team met with district academic leaders from eleven (11) program areas to document programmatic capital priorities. Program representatives were provided with a list of questions in advance of the interviews, allowing them to consult with their colleagues in developing responses.

The questions were intended to elevate the district's social justice and racial equity goals in the context of each respective program vision. All questions were inflected based on the specific academic program area.

The outcomes of these interviews are documented in the Program Vision section of this document.

CRiT Coalition

The Long-Range Facility Plan project team assembled the CRiT Coalition from participants of the dialogue sessions. The Coalition was tasked with shaping the stories and experiences documented during the dialogue sessions into a series of planning-level statements reflecting key themes across the conversations; in essence, to find the general in the specific.

The project team recruited heavily from the affinity group meetings to form the CRiT Coalition. The resulting Coalition was 52% Support Black, Indigenous, People of Color (BIPOC) and 21% students.

This work is reflected in the Planning Principles section of this document.

Forward Together: 2021–2025 Strategic Plan

Rooted in Portland Public Schools reImagined, Forward Together is a strategic plan outlining the initial steps of our journey to our vision. It describes a set of actions and goals that, taken together, will set in motion the changes needed to realize our vision.

The document is still a high-level description; the implementation details are in the site level and department plans. As the vision is long-term, we will need several strategic plans to chart our course.

Long-Range Facility Plan

All large school districts in Oregon are required to complete a Long-Range Facility Plan every ten years. The document is intended to plan for future capital improvements within the context of current educational vision and student enrollment trends over the next 10 to 15 years. The plan provides a strategic framework to be tested against community voice and vision prior to future bond campaigns.

The plan synthesizes three primary considerations: educational program vision, enrollment and capacity, and facility condition. These considerations are guided by a strategic vision established by the district and informed by input from the broader district community.

The plan also addresses OAR 581-027-0040, Long-Range Facility Plan Requirements, and Section 5 of ORS 195.110, School Facility Plan for Large School Districts.

Bond Planning

Bond planning will build on and refine the work in PPS reImagined, Forward Together, and the Long-Range Facility Plan, among other documents. The values presented across these documents must be tested against community voice and vision in the context of specific budget amounts.

Bond Measure

Bond Measures allow Portland Public Schools to continue the vital work of improving the health and safety of our aging school buildings through a combination of system upgrades and modernizations.

Beginning with the 2012 bond, the district prioritized high schools to be modernized or rebuilt. The 2020 bond includes funds for a new Jefferson High School and design work for Cleveland and Wells-Barnett high schools, establishing sightlines to fulfill this commitment in the 2024 bond.

Once complete, the district will have modernized almost 3 million square feet of instructional space — one-third of the total built area district-wide.

2021 | **2023** (SPECULATIVE) | **2024** (SPECULATIVE)

PLAN DEVELOPMENT

ENGAGEMENT & OUTREACH

The development process commenced in November 2020. As an initial step in the planning process, a core team of district leadership met monthly, first in October 2020, to oversee the development of the Long Range Facility Plan.

The core team was responsible for:

- Identifying stakeholders
- Guiding competing direction
- Finalizing the recommendations
- Co-creating the outreach plan
- Supporting the CRiT Coalition

Community voice was central throughout the process, and continued dialogue with community members will be essential to the success of this plan. Under the direction of the core team, outreach was organized into two phases, described below. The outcomes of this document should be tested and refined with community input prior to future bond development.

The goal of the initial outreach was to understand the perceptions, experiences, and aspirations of diverse groups of district stakeholders, including students, teachers, parents, and community members. Fundamental to this goal is the idea that individuals' lived experiences — specifically, the lived experiences of people who, by virtue of race or disability, are often marginalized from the center of our storytelling — are vital forms of evidence in understanding the function of space. To avoid "colorblind-spots," a racial equity model of inquiry was used to inform driving stories that illuminate the diverse perceptions and experiences of our community.

The project team sought student input through close coordination with district elementary, middle and high school teachers, and student groups. Affinity groups were organized to enable groups of people to come together around common social identities, including race and cultural backgrounds, fostering a sense of comfort in sharing stories and generating ideas to inform long-range facility planning efforts. These approaches supported inclusive engagement through empowering the voice of historically excluded or tokenized communities in traditional outreach methods.

The outreach plan included 13 community dialogue sessions and two (2) classroom sessions conducted from January through February 2021. The district actively recruited participants for these sessions via the district's website, email listservs, community newsletters, and social media posts. Additionally, key organizations received personalized invitations to contribute to the process, including the district's RESJ partners.

Across all of the dialogue sessions, there were approximately 63 participants; 51% of participants were BIPOC, and 31% of participants were middle or high school students.

Finally, the district collected multiple online surveys and 37 leadership interest forms via the district website. A complete list of dialogue sessions appears below:

BIPOC Student Dialogue Sessions
(Affinity Groups)
- February 4, 2021
- February 11, 2021

All Student Dialogue Sessions
- February 8, 2021
- February 13, 2021

BIPOC Teacher Dialogue Session
(Affinity Group)
- February 9, 2021

All Teacher Dialogue Session
- February 3, 2021

BIPOC Parents and Families Dialogue Session
(Affinity Group)
- February 3, 2021

Community Partner Dialogue Sessions
- January 27, 2021
- January 29, 2021

Elementary Classroom Activity Sessions
- January 28, 2021
- February 4, 2021

Portland Association of Public School Administrators
(PAPSA)
- January 19, 2021

PPS district Student Council (DSC)
- February 4, 2021

The document's inquiry framework is best illustrated by the following questions:

- How do community members and stakeholders perceive and experience whiteness and other dominant paradigms (based on gender, class, sexual orientation, ability, and other dimensions of diversity) in school space?
- How can district space better reflect and foreground the voice, culture, and contributions of BIPOC folks and other dimensions of diversity?
- How can the Long-Range Facility Plan support the creation of flexible, future-focused learning environments, as defined in PPS reImagined?
- How do community members perceive traditional school space to communicate racial and other social inequities?
- Given the multiple identities and lived experiences in our community, how can school space advance racial equity and social justice? What are socio-spatial ideas for creating a more welcoming and inclusive experience?

Each question type was inflected based on the audience. Lines of inquiry were different for students and community members, but themes in the questions above were reflected in all questions, for all groups. The stories, reflections, and insights from the dialogue sessions were collected and organized to serve as a springboard for further discussion with the CRiT Coalition.

The district assembled a CRiT Coalition from participants of the dialogue sessions. The Coalition was tasked with shaping the stories and experiences documented during the dialogue sessions into a series of planning-level statements reflecting key themes across the conversations; in essence, to find the general in the specific.

The project team recruited heavily from the affinity group meetings to form the CRiT Coalition. The resulting Coalition was 52% BIPOC and 21% students.

THE DISTRICT'S VISION & THE BUILT ENVIRONMENT

TARGETED UNIVERSALISM

Targeted universalism is a policy framework woven in many of the district's guiding documents. Developed by john a. powell, Director of the Othering & Belonging Institute, targeted universalism sets universal goals but pursues these goals through targeted processes.

The district's Racial Equity and Social Justice (RESJ) Lens is an example; as a critical thinking tool, the district's RESJ lens brings focus to the experiences of students of color, especially our Black and Native students, in pursuit of the district's Graduate Portrait.

In the context of capital improvements, we can use the framework by first recognizing a universal goal: support the social, emotional, and intellectual wellbeing of our students by creating developmentally appropriate learning environments; we can then build strategies around targeted groups, recognizing that communities are differently situated in both historical context and the present societal framework.

Race and geography remain strong predictors of life outcomes. One's zip code can reliably predict complex life outcomes such as education level, financial status, and mortality. Behind this inequity is a disinvestment process grounded in a network of American policy and planning following World War II when housing market actors helped sections of Portland reach an advanced state of decay, staging the opportunity for future investments.

In parallel, the systematic denial of mortgage capital consigned BIPOC communities to particular neighborhoods. Unable to purchase property, they were denied access to a blossoming middle-class.

These two processes operated in concert, intentionally increasing inequity among BIPOC communities.

As redlining prevented households from owning, communities had little choice but to rent from absentee landlords who often neglected the property and charged high rent.

Dismantling and rebuilding these policies and practices — systems designed for the perpetual marginalization of the dispossessed — is work that must engage all of us, immediately and continuously.

Approximately forty-three (43%) percent of Portland Public Schools students identify as BIPOC. With this diversity comes the inherited and disproportionate burden of poverty, displacement, and environmental injustice.

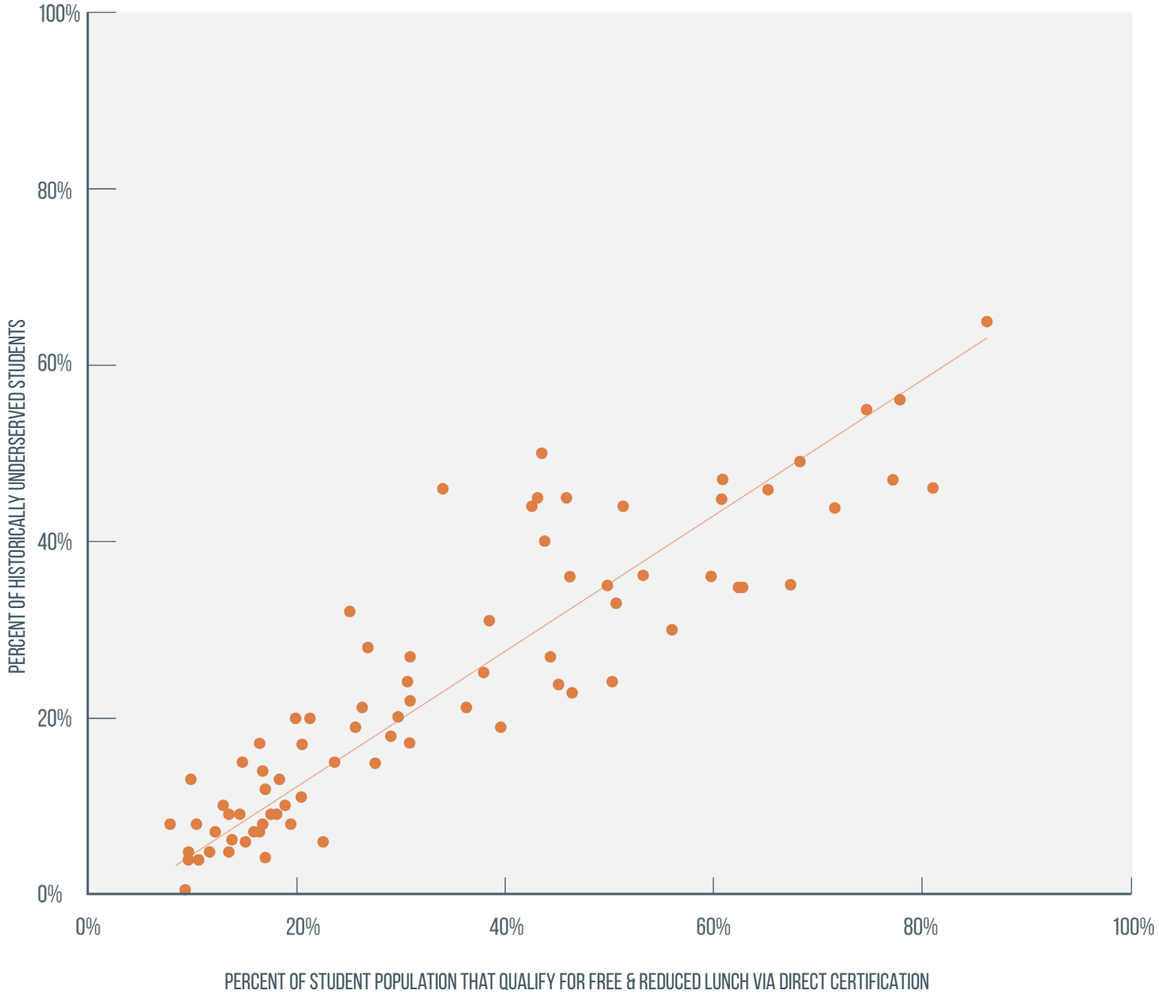
Figure 2 below plots the percentage of historically underserved student population against the percent of students who qualify for free and reduced lunch at each school. The correlation is unequivocal.

We must end the systemic power structures that enable oppressive architecture as well as radically rethink how we build schools to celebrate our disenfranchised communities and protect and strengthen their culture, stories, and learning environments.

At their best, our schools gather students, educators, and community members together both materially and symbolically. Space is not a mute setting for life but an active agent in staging meaningful interaction critical for wellbeing.

As an agent of social change, Portland Public Schools can help rectify harmful and intentional development patterns through targeted investments. This document provides a framework rooted in targeted universalism for capital plans intended to help correct the patterns of entrenched racism that continue to disfigure our community.

FIGURE 2. PERCENT OF HISTORICALLY UNDERSERVED STUDENTS BY THE PERCENT THAT QUALIFY FOR FREE AND REDUCED LUNCH VIA DIRECT CERTIFICATION, PER SCHOOL



DOCUMENT GUIDE

Planning Principles

This section offers guidance on critical areas where district values intersect with the built environment. The work of the CRiT Coalition is presented first. Then planning-level guidance around sustainability, accessibility, Universal Design, Trauma-informed design, and cost management are discussed.

The frameworks draw on three sources of knowledge: community voice (Planning Principles), design theory (Inclusive and Accessible Spaces), and consultant experts (Sustainability and Cost Controls).

Regulatory provisions: OAR 581-027-0040, Sections 3.a-3.d

Enrollment Forecasts

This section contains a systems-level overview of enrollment and utilization data. Trends at the district, configuration, and cluster-level are presented. These data are presented without specific capital recommendations. For site-specific enrollment and utilization data, please see the Capital Forecasts section of this document.

Regulatory provisions: OAR 581-027-0040, Sections 1.a, 1.e.B, and ORS 195.110 Section 5.a.A

Key takeaways:

» The district is currently experiencing a high-school enrollment bubble that will last 5-7 years
» Over the next 15 years, enrollment will decline 3.7% district-wide

Facility Condition

This section contains a systems-level overview of the district's facility condition data. These data are presented without specific capital recommendations. For site-specific building condition information, please see the Capital Forecasts section of this document.

Regulatory provisions: OAR 581-027-0040, Sections 1.d, 1.e, 1.e.A, 1.e.C, 1.e.D, 1.e.D.i, 1.e.D.ii and ORS 195.110 Section 5.a.C

Key takeaways:

» The maintenance backlog across the district is more than a billion dollars.
» Nearly one-half of district buildings were constructed before World War II.

Program Vision

The project team developed program visions in collaboration with academic program leaders. Representatives from select program areas were asked to describe the long-term vision for the program and facilities-related barriers in achieving this vision. The district's RESJ lens was foregrounded throughout the discussions.

Regulatory provisions: OAR 581-027-0040, Sections 1.c, 1.c.A

Key takeaways:

» Equitable program distribution was the most commonly cited facility constraint.

Capital Forecasts

This section builds upon and synthesizes content from the preceding sections. It contains detailed information on all school sites across the district, organized by configuration, with specific enrollment, facility condition, and program vision data per site.

A mid-level analysis of each configuration introduces each set of site summaries. The salient data presented here is intended to support and align with a target universalism framework.

Regulatory provisions: OAR 581-027-0040, Sections 1.b, 1.b.A, 1.b.B, and ORS 195.110 Section 5.a.B, 5.a.E.ii, 5.a.G, 5.b

PLANNING PRINCIPLES

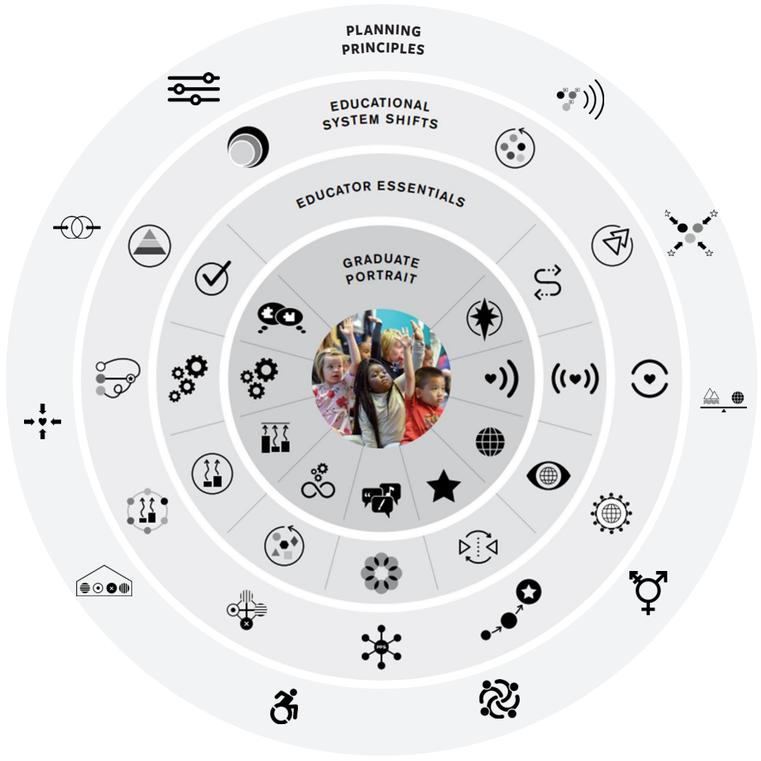
PLANNING PRINCIPLES

This diagram to the right integrates the Graduate Portrait elements with the Educator Essentials and Educational System Shifts. Imagined initially as three rings, it shows the Graduate Portrait elements at the center, at the heart of everything the school district does. Supporting the Graduate Portrait are the Educator Essentials. Some of these elements align directly with those in the Graduate Portrait, such as Empathy with Caring, Empathetic, and Relational educators supporting Reflective, Empathetic, and Empowering Graduates.

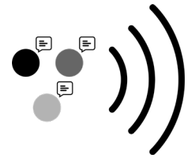
Others cover the less direct but equally powerful ways Educators create an ecosystem in which students can thrive.

With this process, Planning Principles were created as the fourth ring of the integrated diagram. The Planning Principles described in the following pages are intended to center the district's values in the production of physical space.

The Planning Principles were developed in collaboration with the CRiT Coalition. Together with the project team, the Coalition shaped the stories and experiences documented during the dialogue sessions into a series of planning-level statements reflecting key themes across the conversations.



Amplify student-centered spaces to promote autonomy and engagement

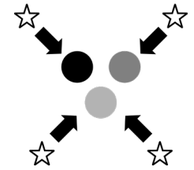


We are committed to centering student voices during planning discussions. Central to this goal is the hope that each student will view their school as a welcoming refuge where they can "unmask," let their guard down and engage authentically with each other and their teachers.

When walking through the school hallways, students should feel visible, recognized, and validated. School buildings will include spaces that allow students to personalize their surroundings and feel ownership. We are reimagining our schools as inspirational, engaging, student-centered spaces that encourage exploration, creativity, validation, and project-based learning.

Schools will reflect a culturally dynamic model that promotes a collective sense of belonging and ownership.

Support Black, Indigenous, People of Color (BIPOC) students and families through targeted investments

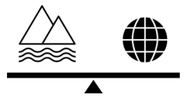


Portland Public Schools celebrates diversity. We also recognize that many of our BIPOC students, as well as other marginalized youth, are challenged with the disproportionate burden of poverty, displacement, and environmental injustice. By understanding the systemic barriers presented by decades of disinvestment in communities of color, we will prioritize facility improvements to schools serving a high proportion of BIPOC and historically marginalized students.

The district will create opportunities for BIPOC stakeholders and business owners to take an active role in local facilities planning and design decision making, ensuring their voices help shape capital investments.

Recognizing the persistent achievement gap between BIPOC and white students, we are dedicated to making targeted investments in the district's most racially diverse schools by expanding access to programs to ensure that students are prepared for an array of postsecondary options.

Promote building and site features that advance the district's commitment to climate justice



BIPOC communities are disproportionately vulnerable to the effects of climate change. Our buildings must model environmental responsibility through sustainable design features and efficient operations.

Recognizing the exacerbating effects of climate change on temperature extremes, effective HVAC systems will become increasingly crucial to maintaining comfortable thermal conditions. School buildings equipped with passive systems are energy efficient. They can allow uninterrupted operation following a natural disaster or major seismic event, providing a necessary cornerstone to resilient communities.

Landscaping improvements at schools serving a high proportion of BIPOC or marginalized families can mitigate the heat island effect common to dense urban areas by providing shade and grass.

Disrupt gender binary by affirming a gender spectrum in programs, spaces, services, and experiences

We are committed to ensuring that transgender, non-binary, gender-fluid, and otherwise gender-diverse students are fully included in the school community. School buildings should include features that affirm and support a gender spectrum, ensuring that gender diverse students feel seen, acknowledged, and supported.

District buildings will include gender-neutral facilities with appropriate signage and recognize all personal pronouns in signage.

Promote culturally dynamic environments

Space is not neutral.

The built environment often signals who holds power — architectural forms celebrated and protected as historical can mediate messages about authority and the dominance of white history and white culture.

Understanding buildings as social artifacts, we are committed to foregrounding BIPOC engagement to support culturally responsive environments.

We believe in the importance of forming highly diverse school planning and design committees with strong representation from BIPOC communities and student groups to provide a multicultural lens through which to view facilities-related decisions. We invite a process that critically reviews future capital projects and supports alignment with the district's Racial Equity and Social Justice goals. Further, we commit to a sincere and persistent effort to incorporate the feedback we receive from the BIPOC community.

Create socially meaningful and inclusive spaces that support students with physical, social, and behavioral disabilities

Portland Public Schools is committed to equitable access to all programs, for all students, regardless of ability. We recognize the inherent dignity of all people and seek not just to accommodate, but to elevate the experience of differently-abled individuals. Ways to be in the world are infinitely varied, and it's the work of the built environment — its playgrounds, classrooms, and gathering spaces — to let each student fully engage to the extent they are able.

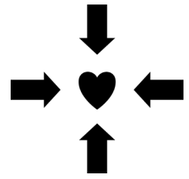
Our goal is to integrate universal design principles in all our spaces to create experiences that feel natural and enable students with disabilities to study, play, socialize, and travel alongside their peers. This integration will positively support the learning experience of all PPS students.

Cultivate welcoming schools for BIPOC families and community partners

Community partners play a critical role in helping the district meet the needs of diverse communities. We aspire to create, expand, and upgrade community spaces across all schools, particularly those serving BIPOC families.

We are committed to providing school buildings with dedicated, intentionally designed, and centrally located spaces for community partners. Our buildings should support community-directed programs such as health and social services, culturally-specific arts gatherings, childcare, lactation, and food and clothing distribution.

Exemplify planning and design features in service to comfort, belonging, physical health and social-emotional wellbeing for students who have experienced trauma

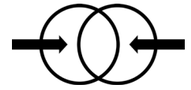


Inequity breeds trauma.

Schools can provide social-emotional support and promote healing through relationship building. Our schools should serve as a refuge for students, particularly trauma survivors and students with adverse childhood experiences who may not access essential support elsewhere.

Portland Public Schools can exemplify a culture of care through mitigating spatial barriers to accessing resources, wellness space, and essential resources. Design can destigmatize seeking help, support biopsychosocial health and healing, and improve emotional growth by incorporating the guidelines of Trauma-Informed Design.

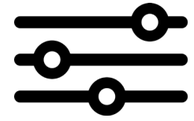
Center community spaces for marginalized students and families



We hold racial equity and social justice as central tenets for all decision making and aspire to eliminate systemic barriers that lead to disparate educational experiences for BIPOC families. Facility investments present an opportunity to address historic injustices and create a transformative vision for social equity.

Centrally located and fully accessible community spaces are essential. Schools thrive when they celebrate local cultures, community heritage, and linguistic diversity. This sense of welcome and belonging extends to all families.

Amplify flexible and adaptable building features in support of collaborative, hands-on learning



PPS Reimagined identifies “Flexible, Future Focused Environments” as one of 11 educational system shifts implemented across our schools. Future capital projects should incorporate agile building features that are easily modified to support a range of activities.

Future construction or modernization will emphasize adaptability and non-permanence, supporting evolving educational trends and changing student populations.

INCLUSIVE & ACCESSIBLE SPACES

LEGAL DEFINITIONS OF ACCESSIBILITY ARE NECESSARY (BUT INCOMPLETE)

The Americans with Disabilities Act, known as the ADA, began under Section 504 of the Rehabilitation Act of 1973, which prohibited discrimination based on disability by recipients of federal funds. It recognized persons with disabilities as a class, or legitimate minority, subject to discrimination as valid as inequity based on race, religion, age, and sex, and just as deserving of basic civil rights protections. This act endeavored to establish equal opportunities for those with disabilities.

We recognize the importance of ensuring full accessibility to all facilities. To this end, the district updated its ADA Transition Plan in 2020 in collaboration with the disability community.

Conversations with the disability community provided meaningful direction in shaping accessibility outcomes district-wide. These conversations provided insight into a deeper dimension of accessibility. Community members elevated aspects of accessibility where federal guidelines are anemic or silent altogether. Playspaces are one example; restrooms are another. In each case, the district continues to supplement federally mandated accessibility guidelines in documents such as the Ed Specification and Technical Design and Construction Standards to fill an essential need in our community.

In no way does an expanded view of accessibility undermine legal protections for individuals experiencing disability — the positive impact on the lives of millions is undeniable. Yet "access" through the lens of the ADA was designed for people with particular physical disabilities and, most importantly, still conceived from the perspective of typical development.

UNIVERSAL DESIGN

Universal design is a framework broader than the dimensional guidelines of the Americans with Disabilities Act. The framework extends beyond accessible and barrier-free design to an invitation to rethink the horizon where our bodies and minds meet the world around us.

The curb cut found at our city sidewalks is a canonical example. Vital to breaking down barriers for individuals with physical disabilities, the curb cut supports the flow of bicyclists, strollers, and delivery carts alike. The design makes places and objects work for people with disabilities and benefits everyone.

Ways to be in the world are infinitely varied, and it's the work of the built environment to mediate all the ways of being human.

We recognize forms of disability have less to do with the sensory or mobility capacities of the body but rather the limitations of the inherited structures of our environment. Buildings have historically matched the needs of their dominant culture. Today the challenge we face is a radical reshaping of a disabling world. Nonetheless, our commitment to a more inclusive built environment reflects and reinforces our commitment to protect our community's physical and emotional health.

Universal design considers the full range of human variety: from ability to language and culture, as well as gender and age. Its principles and goals, as developed by the Center for Universal Design, are listed below.

Principles of Universal Design:

Equitable Use

The design is useful to people with diverse abilities. This is achieved by:

- Providing the same means of use for all users: identical whenever possible; equivalent when not.
- Avoiding segregating or stigmatizing any users.
- Provisions for privacy, security, and safety should be equally available to all users.
- Making the design appealing to all users.

Flexibility in Use

The design accommodates a wide range of individual preferences and abilities. This is achieved by:

- Providing choice in methods of use.
- Accommodating right- or left-handed access and use.
- Facilitating the user's accuracy and precision.
- Providing adaptability to the user's pace.

Simple and Intuitive Use

Use of the design is easy to understand, regardless of the user's experience, knowledge, language skills, or current concentration level. This is achieved by:

- Eliminating unnecessary complexity.
- Being consistent with user expectations and intuition.
- Accommodating a wide range of literacy and language skills.
- Arranging information consistent with its importance.
- Providing effective prompting and feedback during and after task completion.

Perceptible Information

The design communicates necessary information effectively to the user, regardless of ambient conditions or the user's sensory abilities. This is achieved by:

- Using different modes (pictorial, verbal, tactile) for redundant presentation of essential information.
- Providing adequate contrast between essential information and its surroundings.
- Maximizing "legibility" of essential information.
- Differentiating elements in ways that can be described (i.e., make it easy to give instructions or directions).
- Providing compatibility with a variety of techniques or devices used by people with sensory limitations.

Tolerance for Error

The design minimizes hazards and the adverse consequences of accidental or unintended actions. This is achieved by:

- Arranging elements to minimize hazards and errors: most used elements, most accessible; hazardous elements eliminated, isolated, or shielded.
- Providing warnings of hazards and errors.
- Providing fail safe features.
- Discouraging unconscious action in tasks that require vigilance.

Low Physical Effort

The design can be used efficiently and comfortably and with a minimum of fatigue. This is achieved by:

- Allowing users to maintain a neutral body position.
- Using reasonable operating forces.
- Minimizing repetitive actions.

» Minimizing sustained physical effort.

Size and Space for Approach and Use

Appropriate size and space is provided for approach, reach, manipulation, and use regardless of user's body size, posture, or mobility. This is achieved by:

» Providing a clear line of sight to important elements for any seated or standing user.
» Making reach to all components comfortable for any seated or standing user.
» Accommodating variations in hand and grip size.
» Providing adequate space for the use of assistive devices or personal assistance.

TRAUMA INFORMED DESIGN

Trauma-informed design integrates tenets of trauma-informed care into the design of buildings with the goal of creating environments that promote healing and recovery. Designing for individuals coping with trauma suggests the following six strategies:

Safety

Create the perception of safety in addition to actual safety while balancing privacy and the need to maintain clear sightlines. Open spaces with clear sightlines and few barriers will increase the sense of spatial availability, which mitigates perceived crowding. This is achieved by providing:

» clear sight lines and well-lit spaces
» wide corridors (avoid blind corners)
» open stairways and large elevator cabs without mirrors
» vision glass in doors and walls to allow visual connection between spaces
» multiple paths to destination (avoid dead-ends)

Nature

Promote connectedness to the natural world. Connections to nature have been found to reduce stress and improve mood. This is achieved by providing:

» natural light
» views to outdoors spaces and/or sky
» areas of planting inside the building
» spaces finished with natural materials and colors

Comfort

Reduce or remove adverse stimuli and environmental stressors. This is achieved by providing:

» indirect lighting where possible to reduce glare/flicker (avoid fluorescent lighting)
» LED lighting controlled to match natural circadian rhythms
» paint colors in lighter, natural hues (avoid bold, warm colors)
» low-emitting materials and fresh air silently and at low speed
» well insulated building assemblies with windows to enhance thermal comfort and reduce drafts
» good acoustic separation between spaces and acoustic control within spaces
» furniture arrangement that allows prospect and refuge – arrange seating against walls looking out (avoid: seats facing a wall, seats with their backs to a door, face-to-face seating)
» non-representational or natural imagery (avoid symbolic significance in art that may be negatively interpreted)

Coherence

Incorporate a coherent narrative within the building to develop a sense of trust in the environment. This is achieved by providing:

» predictability in structure and finishes throughout the building (avoid irregularity, strong visual contrasts, dissimilar visual elements)
» logical sequential arrangement of spaces
» simple and clear wayfinding (avoid overstimulation)
» ample storage to reduce clutter

Sensory Support

Furnish spaces for sensory support and self-care to promote mental health. This is achieved by providing:

» quiet rooms or small lounges for individuals in distress to be away from others
» spaces for groups to move to in the event that an individual in distress cannot be moved
» break rooms and quiet rooms with comfortable and uncluttered surroundings

Agency

Integrate options into the design to support decision-making opportunities for an individual in crisis that can help de-escalate behaviors triggered by trauma. This can be achieved by providing:

» movable seating or multiple seating options
» multiple paths to destination
» different settings for one type of use (for example, booth or table for dining)
» options for lighting levels through availability of controls (dimmers, shades, proximity to windows/skylights)
» operable windows
» space for personalization to reflect individual identity

PROJECT PLANNING & ACCESSIBILITY

Outlined below are the major project phases with specific accessibility considerations for each phase.

Master Planning
Master planning will establish many of the social patterns of the site and building. Traffic flow, pedestrian access, and primary entries interact in complex ways with site topography, zoning, and program requirements. Accessibility must be foregrounded in master planning to reduce or eliminate barriers across primary site and building access points to ensure students with disabilities can travel with their peers. Future design phases can do little to meaningfully integrate accessibility across the site if not considered in this phase.

Pre-Design
In this phase, teams should identify and evaluate areas of the site and building with unique accessibility requirements. Common areas are one example; kitchens and bathrooms are two others. If planned early, most aspects of accessible design will be cost-neutral. Still, design teams should communicate to cost estimators specific budget items associated with accessibility to avoid value engineering later in the project. Room aspect, room square footage, and glazing requirements should be foregrounded and associated with the considerations outlined above.

Design - Construction
The material and dimensional requirements should be developed and refined throughout the design phases of the project. Accessibility encompasses a wide spectrum of design considerations: from barrier-free access to door handles and cabinet pulls. Disability manifests in different ways in our students — attention to all the ways of being human is necessary at each phase.

SUSTAINABILITY

OVERVIEW

Sustainability, resilience, and equity are interrelated. Planning should occur around all three in concert, with guidance from the district's Sustainability Standards and Climate Action Policy.

Due to their ability to operate passively, energy-efficient buildings can perform through natural disasters or other forms of infrastructure collapse, offering refuge to the surrounding community.

Across the United States, buildings contribute to approximately forty percent (40%) of the nation's annual energy use and carbon emissions. The most significant impact that the district can have in reducing our impact on climate change is to reduce our buildings' carbon emissions through energy reduction measures and to move to all-electric.

ALL-ELECTRIC DESIGNS

Local electric utilities are committing to reducing the carbon footprint of their electricity over the coming decades. Moving to all-electric will allow district facilities to reduce their carbon footprint over time in concert with electric utilities. The carbon footprint of natural gas is expected to remain the same or increase due to leakages in the aging infrastructure.

All-electric design also reduces initial costs over installing a gas service and protects the district against the projected increase in natural gas prices in the years to come.

PLANNING & SUSTAINABILITY

Energy-efficient design should be prioritized in the earliest design stages to ensure the district sustainability goals can be met. Once budgets are finalized, it is difficult, if not impossible, to expand the sustainability scope of a project. Foremost when considering an energy-efficient design should be the balance of initial costs - the cost paid during construction - with mid-to-long term operational costs.

An Energy Life Cycle Cost Analysis can illuminate initial capital cost against utility, maintenance, and replacement over a 30-50 year span. Typical energy efficiency measures are cost-neutral in the mid-term and produce operational savings in the long term.

DEFERRED MAINTENANCE WORK

Smaller projects such as deferred maintenance and system replacements can also impact energy and water use. After modernizations and building replacements, deferred maintenance work is the next opportunity to optimize building performance. All such projects should implement the recommendations in the Sustainability Standards. Refer to the ASHRAE Advanced Design Guidelines for further guidance.

Combining deferred maintenance on mechanical, electrical, and plumbing systems with envelope improvements will generate the most significant gains in building efficiency.

EQUITY IN SUSTAINABILITY

Design teams should refer to the Climate Action Policy for recommendations when considering sustainable design. Highly sustainable buildings are often the healthiest as well in terms of indoor environmental quality. Many of our neighborhoods are located in historically redlined districts with little tree cover and wide expanses of heat-retaining asphalt and concrete — ground-level air temperatures are higher here than other city areas with more tree cover. As a result, many students and their families live in unhealthy environmental conditions at home on their way to school. Designing healthy and efficient buildings in these areas is essential.

RENEWABLE ENERGY AND STORAGE

Solar photovoltaics (PV) should be considered on most projects to offset a portion if not all of the building's energy use. If PV is not feasible, the facility should be designed to be "PV-Ready" for a future PV System. In addition to PV, facilities should incorporate battery storage technologies with microgrid capability or provision to be "battery-ready." Having a micro-grid will provide the opportunity to improve the resilient operation of the facility and allow the facility to act as a community shelter when needed.

WATER AND WASTE

Potable water availability is a significant issue in many parts of the world. Although our region has historically been gifted with clean and plentiful water, this may not last due to changes caused by climate change. Designing our buildings to reduce water consumption is essential in the long term. Water and waste prices will increase in the coming decades; investing in efficient systems today will reduce increases in operational expenses.

COST CONTROLS

SYSTEM UPGRADES

Deferring system maintenance over a series of years or even decades can significantly increase the ultimate (and inevitable) cost of addressing those deficiencies. The nature of maintenance is such that when the district delays updating critical infrastructure, the effects compound across structures, systems, assemblies, and equipment resulting in much higher project costs when the repairs are eventually made. For example, delayed maintenance of roofing or mechanical systems may drastically affect other building elements through water intrusion or compromised structural integrity.

While the average cost of new construction escalation averages about 3-4% per annum, renovating an existing building with a significant deferred maintenance backlog may result in a cost escalation risk that is 1.25 - 1.5 times greater, particularly where aging mechanical, electrical, and plumbing (MEP) systems are present. With the district's documented maintenance backlog of approximately $600 million (hard costs), even modest cost escalations equate to large sums of money. As such, it is important to prioritize upgrades to critical building systems that impact mechanical, plumbing, roofing, accessibility upgrades, access control, structural, emergency power, and fire suppression systems.

Many older structures have poorly performing building envelopes which compound the impacts of aging mechanical equipment and ductwork. When reviewing the MEP systems at a particular building, the emphasis should be on replacing old or underperforming equipment. As a rule, most types of mechanical equipment can perform satisfactorily for about 25-30 years; after this timeframe, full replacement is recommended. In some cases, older equipment may show no visible or auditory signs to indicate that it is not operating optimally, yet it may be drawing excessive amperage to function resulting in excessive hidden operational costs to the district.

Updated mechanical systems can produce significant operational cost savings. The district should consider investing in the following systems when replacing HVAC systems in aging buildings:

» Direct Digital Control (DDC) systems are resilient and capable of interacting with various component manufacturers (Via Native BACnet), improving functionality while minimizing energy consumption. Most modern DDC systems can be interchangeably serviced and augmented. As such, PPS should avoid proprietary systems that lock the district into an expensive sole-source relationship.

» The new variable refrigerant flow systems (VRF) may be integrated into an economical Dedicated Outdoor Air System (DOAS) ventilated air system. While the individual components of this system are not as long lasting as the standard Variable Air Volume (VAV) system components, they are easier to replace and more versatile to retrofit than non-VRF components. The system presents a solid alternative for aging buildings with central plants that are near or past term; the hydronic piping can be abandoned or demolished, and the Central plant space can be largely repurposed, allowing ventilation ductwork to be cleaned, resealed, and put back into service. Additionally, VRF components are provided with factory controls and require less integration into other systems.

Whether constructing a new facility or renovating an existing structure, it is important to remember that the initial cost of systems, equipment, fixtures, and materials only represent a fraction of the long-term cost of the building. For an asset like a new K-12 school, initial construction cost constitutes only about 20% of the total expenditure over the building's lifespan.

The other 80% of the total life cycle cost is generated through the building's operation, maintenance, and decommissioning. Although the upfront cost of upgraded systems may be higher than lower-cost alternatives, choosing energy efficient and robust systems with longer lifespans will result in much greater long-term cost savings. Thoughtful sustainability measures will pay for themselves many times over the lifespan of the building.

TRADE-SCOPE CONSOLIDATION

With complex projects requiring upgrade of multiple systems, it is important to consider which projects may be performed in isolation vs. consolidated as part of a major renovation. Certain building upgrades may be performed in isolation efficiently and cost-effectively, particularly those that require limited subcontractor coordination and can be completed over the course of a summer break. Such projects may include roofing, door hardware upgrades, window replacements, and minor site improvements. However, when a building requires significant structural upgrades, major mechanical, electrical, plumbing, and technology upgrades (including low voltage if new pathways are required), new elevators, new interior construction, or is impacted heavily by hazardous materials abatement, it is typically best to package those scopes into a comprehensive modernization performed by a single general contractor.

The most important determining factor in how large a renovation scope may grow is the state of a building's existing structural system. In cases where major structural interventions are required, it is difficult to isolate the scope in a way that does not impact most trades. In these cases, full modernization is often advisable to maximize the life cycle cost-benefit.

Examples of system upgrades that would benefit from consolidation and sequencing of trades include:

» Elevators/Stairs: The addition of vertical circulation (stairs or elevators) should be performed in conjunction with seismic upgrades when possible as both require significant demolition and structural work. Elevator and stair cores are good locations for shearwalls, braced frames, and other structural elements.

» MEP: Complete mechanical, electrical, plumbing, and technology upgrades that require new equipment and distribution should be performed as part of a modernization whenever possible. With mechanical systems, it is generally more cost effective and more efficient to combine the mechanical wet and dry distribution, mechanical controls, and plumbing scopes to one prime contractor. Electrical, lighting, and low voltage upgrades are often best packaged together with interior construction since they often necessitate wall/floor/ceiling finish and fixed furnishings work. The electrical contractor should prime the low voltage work to a low voltage contractor. Replacement of existing fixtures that do not require new conduits/raceways/cable trays may be performed in isolation (e.g. pulling new data cabling through existing raceways to connect new classroom monitors); however, reuse of existing distribution to support new fixtures or equipment should always be carefully evaluated for necessity, performance, and life cycle cost impacts.

» Structural: Seismic upgrades should be coordinated with updating interior finishes (e.g. walls, floor, ceilings). Roofing replacements may be timed to coincide with ceiling replacements.

REGIONAL TRENDS

Regional cost per square foot in 2021 are shown below:

CONFIGURATION	COST PER SQFT
ELEMENTARY	$510/ SF
MIDDLE	$540 / SF
HIGH	$590 / SF

2021 marked a period of extreme volatility in construction material and commodity prices, including massive increases in the cost of lumber (up 100% y/y), gypsum (up 12%), and ductwork (copper & brass up 49%). Increased supplier costs for lumber, steel, aluminum, copper, sand, etc. are attributed to a variety of factors including reduced supplier production capacity, lingering effects of tariffs, and supply chain disruptions due to labor shortages and import restrictions.

As of June 2021, the volume of commercial construction in the Portland-Metro area remains well below early 2020 levels; consequently, a portion of these cost increases may be offset by growing competition among trade contractors. However, as the market rebounds and competition for labor increases, those material cost increases will become more problematic until a market correction occurs (likely in mid to late-2022).

Costs per square foot can vary widely based on factors such as building area, site conditions/constraints, massing/building geometry, construction type, exterior and interior finish selections, and MEP systems. The costs in the table above are inclusive of all margins and adjustments for the building only include building only including all margins and adjustments).

REUSE OF EXISTING STRUCTURES

Portland Public Schools has a large inventory of aging school facilities that will require extensive renovation or replacement to meet the educational needs of the district. A number of factors drive the complex decision of whether to modernize or replace an educational facility, including:

- The condition of the building, as reflected by its facility condition index (FCI) score.
- The educational suitability of the building to meet the district's teaching and learning objectives.
- Projected enrollment, particularly where a school's utilization exceeds its capacity and the school site is not large enough to accommodate an expansion.
- Whether the facility is on the National Historic Registry and/or has historic significance to the community.
- Whether inherent structural deficiencies present seismic risks that would be prohibitively expensive to remediate.
- Presence of extensive environmental health issues that would be expensive and/or difficult to fully mitigate.
- School sites that are no longer suitable for educational use due to safety or traffic concerns.

While the facility condition index (FCI) score provides a very general measure of the ratio of projected renovation costs to current building replacement value, intensive investigation and testing are often required to document the myriad of conditions that may complicate a building modernization project.

Factors that may significantly increase costs include the presence of hazardous materials, subsurface soil conditions, non-code compliant features, and the projected lifespan of critical building systems.

Renovating existing structures can be more challenging

if the building requires significant interventions to accommodate seismic upgrades, new structural elements, new interior fit outs, and new MEP systems. Changing occupant load or making structural modifications beyond certain thresholds can often trigger additional upgrades that add significant cost. If major work is required to correct such problems, the case for modernization and/or adaptive re-use becomes less compelling.

When developing the scope and preliminary schedule for a renovation project, it is important to thoroughly investigate existing conditions (particularly with older buildings). While invasive/destructive testing can be time-consuming and costly, it greatly reduces the risk of budget overrun in construction. It is not uncommon to see general contractors carry 7-10% construction contingency in their estimates to account for the risk of extra work to mitigate undocumented or unforeseen conditions in renovation projects.

While thorough investigation and testing may cost several hundred thousand dollars, a contractor could reasonably reduce construction contingency to 3-6%, saving millions on a major school modernization project. Also, such testing allows the team to proactively integrate the item into the scope of work rather than via change order during construction.

Structural costs for renovations as a percentage of the total direct costs vary widely depending on the size of the building and the complexity of the scope. If structural work is minor, structural work may constitute 10% or less of the total direct costs.

On projects where major structural work is required, it may account for 35% or more of the total direct construction budget. Previous district projects can provide useful benchmarks on the cost to upgrade structural systems in existing buildings vs. structural costs in new buildings. Below are two notable recent district projects and the approximate percentages allocated to structural work:

Grant High School

- Percent of (direct) Renovation cost dedicated to structural: 25% (work to rehab existing structure)
- Percent of (direct) New Build cost dedicated to structural: 38%

McDaniel High School

- Percent of (direct) renovation cost dedicated to structural: 23% (work to rehab existing structure, not incl. demo and anchoring of unreinforced masonry on exterior walls)
- Percent of (direct) new build cost dedicated to structural: 18%

Substantial costs were incurred to rehabilitate the existing structural systems at both Grant High School and McDaniel High School. The different allocations for new build structural work at Grant HS vs. McDaniel HS reflect the unique scope of each project. Much of Grant's new build structural costs were associated with the construction of a new gymnasium (gyms have long structural spans and less dense fit outs which tend to be costly). In planning for future capital projects, the district should factor in the projected cost of structural work to existing facilities vs. new build when determining whether to modernize or replace buildings.

ENROLLMENT & UTILIZATION

ENROLLMENT & UTILIZATION

Portland Public Schools currently serves approximately 48,000 students in kindergarten through 12th grade. The ability of each school to support the students, teachers, and spaces needed for effective teaching and learning are critical for the success of the district's educational programs. Planning for fluctuations in student enrollment is necessary, as the state funding formula for education is allocated, and teachers are assigned, based on the number of students anticipated each year.

ENROLLMENT FORECAST

Enrollment forecasts are used, in part, to determine whether the district will need to add or modify facility space to meet school program or configuration needs. Student enrollment forecasts, combined with building capacity and utilization, provide a framework for facility needs to serve Portland Public Schools' Graduate Portrait.

The enrollment forecasts presented below were prepared by the Portland State University Population Research Center for Portland Public Schools. These data are based on the recent enrollment numbers (October 2019 and October 2020) and forecast through 2036. The 15-year enrollment forecast integrates district enrollment trends with local area population, enrollment, and housing trends. Summary information from the report is included on the following pages. This information is intended to be used as a school planning tool and a basis for community discussions about future school facility needs.

The COVID-19 pandemic significantly shifted enrollment for the 2020-2021 school year; the assumption in these data is that distance learning will not influence long-term enrollment. Instead, the 2020-21 school is treated as an isolated anomaly.

The nature of forecasting requires some level of speculation, so questions around data integrity are warranted; however, previous forecasts offer a way to validate predictions because of the methodological consistency used by the Population Research Center. When measuring the deviation between forecasted and actual enrollment, estimates from 2010 through the end of 2019 (pre-pandemic) had an error rate of less than 2%, often below 1%.

These forecasts consider factors around population, housing, and enrollment trends. Annual enrollment forecasts for the district overall, per high school cluster, for students residing in each school attendance area, and students enrolled at each school are presented below.

Primary data sources used to prepare these forecasts include historic enrollments through 2020-21, U.S. Census Bureau 2000 and 2010 Decennial Censuses and 2015 to 2019 American Community Survey, birth data from the Oregon Center for Health Statistics, and housing development information from the City of Portland and Metro.

POPULATION TRENDS

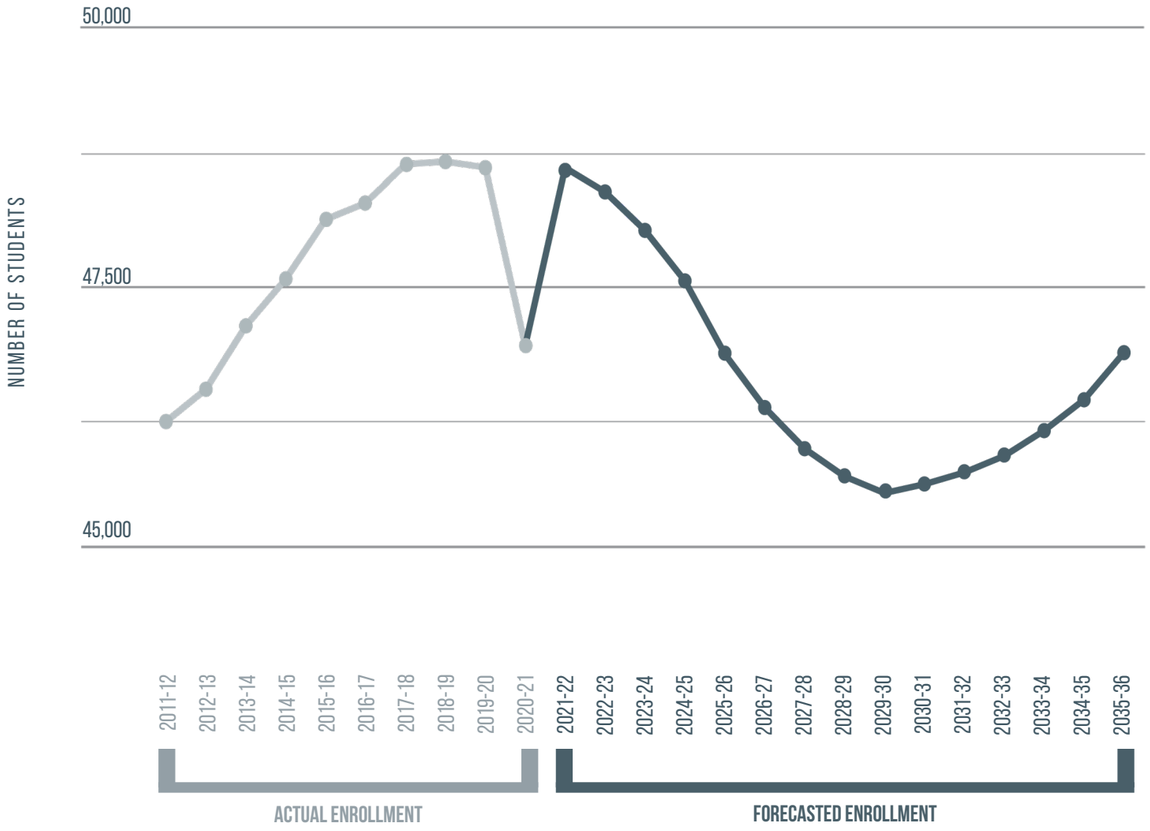
- Between 2000 and 2010, the population in-district grew by approximately 34,000, from 426,110 persons to 460,248. Growth accelerated between 2010 and 2019; it is estimated that the district increased by around 47,000 residents, reaching about 508,700 by 2019.
- The district's average annual growth rate of 0.8 percent between 2000 and 2010 fell below the metro area's 1.4 percent average growth rate; the district's estimated 1.1 percent growth rate between 2010 and 2019 is much closer to the 1.3 percent metro area average growth during the period.
- Birth rates in-district have fallen precipitously since 2010; the number of births fell by 26 percent from its 2008 peak to 2019.

ENROLLMENT TRENDS

- After ten consecutive years of growth from fall 2008 to fall 2018, the district saw a slight net loss of 55 students between fall 2018 and fall 2019.
- In fall 2020, Portland Public Schools enrolled 46,937 students in grades K-12, decreasing 1,716 students from fall 2019. The K-12 enrollment decline in fall 2020 was attributable to families' choices in response to distance learning during the COVID-19 pandemic.
- The most significant impact of COVID-19 was seen in kindergartens, which likely would have enrolled about 3,800 students, but instead enrolled 3,245 students, 629 fewer compared with fall 2019. This 16 percent drop was similar to kindergarten declines in nearby districts and the State of Oregon overall.
- Elementary (grades K-5) enrollment peaked in fall 2016 and saw net losses of 0.6 percent, 2.2 percent, and 1.6 percent in successive years. Another decline of one to two percent was expected between fall 2019 and fall 2020; the actual decline was 7.3 percent due to the net loss of 1,725 students.
- District-wide enrollment in secondary grades experienced steady growth through fall 2019, beginning in 2010-11 for middle schools and 2014-15 for high schools.
- The pandemic caused a slight decrease in middle grades, at a net loss of 115 students (1.0 percent) between fall 2019 and fall 2020. High school enrollment, in contrast, continued to increase despite the shift to remote learning, gaining 124 students (0.9 percent) from fall 2019 to fall 2020.

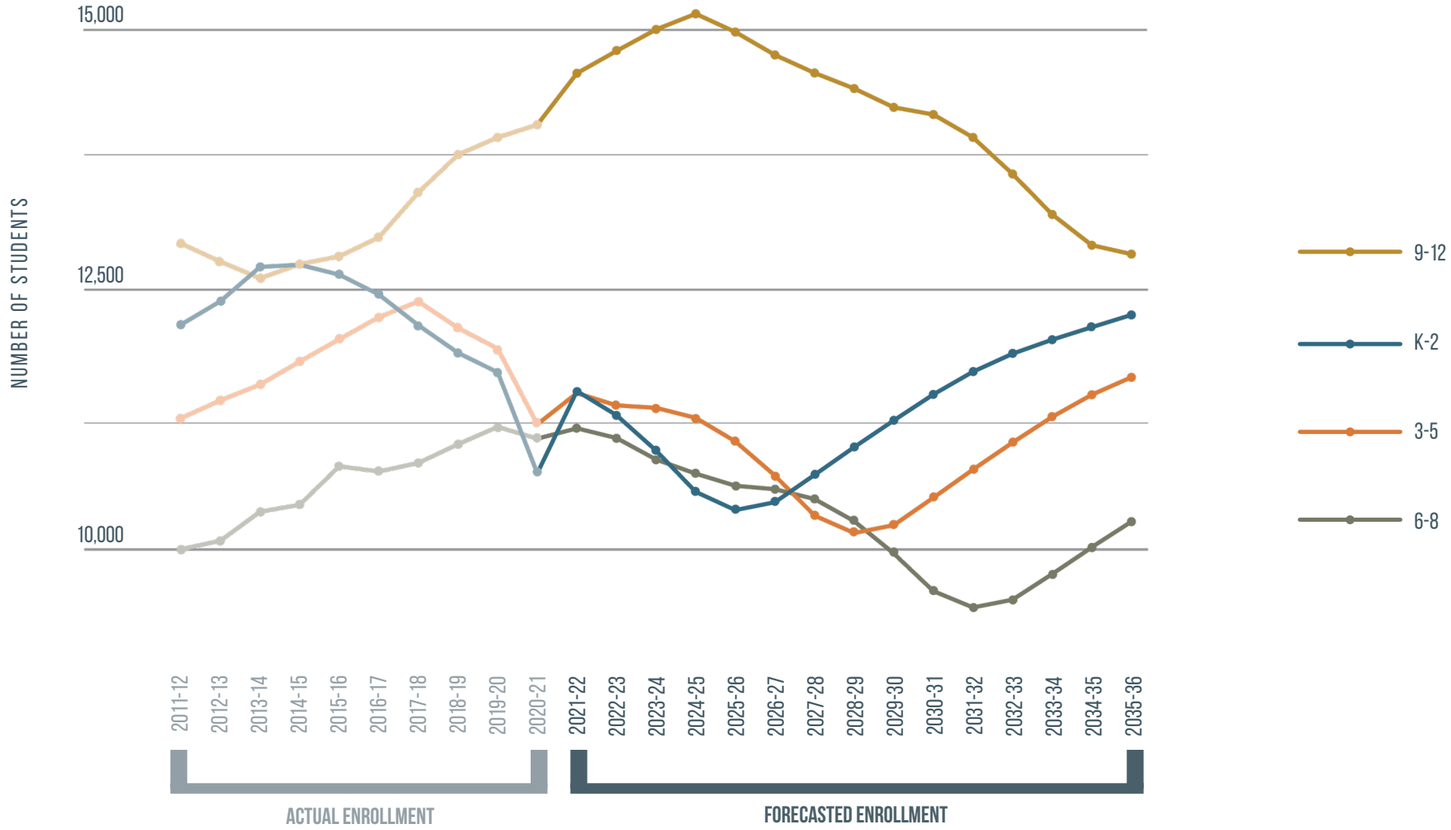
HOUSING TRENDS

- Between 2000 and 2010, approximately 25,000 housing units were added within district boundaries. Despite the construction slowdown following the Great Recession, housing growth in the 2010s has substantially outpaced the 2000s.
- In the five years between 2016 and 2020, the City of Portland issued building permits for over 25,000 units within the district. Multi-family units accounted for more than 21,200 (85 percent) of those units, of which nearly 1,900 were accessory dwelling units.
- Single-family development has occurred throughout the district, though the Cleveland, Franklin, and Jefferson clusters have accounted for more than 63 percent of new single-family homes in the past ten years. Multi-family development is more concentrated, with 82 percent of 2017 to 2020 permits issued in the Cleveland, Jefferson, and Lincoln clusters.
- New affordable housing projects within the district scheduled for occupancy between 2021 and 2023 include about 600 family-size units of two or more bedrooms.



DISTRICT ENROLLMENT FORECAST SUMMARY

- In fall 2020, the district enrolled 46,937 students in grades K-12, a decrease of 1,716 students from fall 2019. Growth had been slowing already; after ten consecutive years of growth from fall 2008 to fall 2018, the district saw a slight net loss of 55 students between fall 2018 and fall 2019. However, nearly all of the K-12 enrollment decline seen in fall 2020 was attributable to families' choices in response to distance learning during the COVID-19 pandemic, a trend seen throughout Oregon and the U.S.
- The most significant impact of COVID-19 was seen in kindergartens, which likely would have enrolled about 3,800 students in a typical year, but instead enrolled 3,245 students — 629 fewer compared with fall 2019. This 16 percent drop is similar to or less than in adjacent districts, including Beaverton (17 percent), Lake Oswego (15 percent), and Tigard-Tualatin (24 percent).
- In Oregon, the statewide drop in kindergarten enrollment amounted to nearly 15 percent. Other grades are also noticeably affected by the pandemic, with enrollment in each grade from 1st to 6th falling short of the forecast that we prepared in April 2020 by four to six percent. Enrollment in grades 7-12 was less impacted, falling short of the forecast by an average of only one percent.
- Overall district enrollment is projected to fall for several years after 2021-22, reaching a low of 45,518 in 2029-30. By the end of the 15-year forecast in 2035-36, enrollment is 46,869 — nearly 1,800 students below its pre-pandemic 2019-20 level.



Enrollment change 2019-20 through 2035-36 summary:

CONFIGURATION	2019-20 ENROLLMENT	2035-36 FORECAST ENROLLMENT	CHANGE	
K-2	11,665	12,226	561	4.8%
3-5	11,896	11,617	-279	-2.3%
6-8	11,132	10,206	-926	-8.3%
9-12	13,960	12,820	-1,140	-8.2%
K-12	**48,653**	**46,869**	**-1,784**	**-3.7%**

Elementary

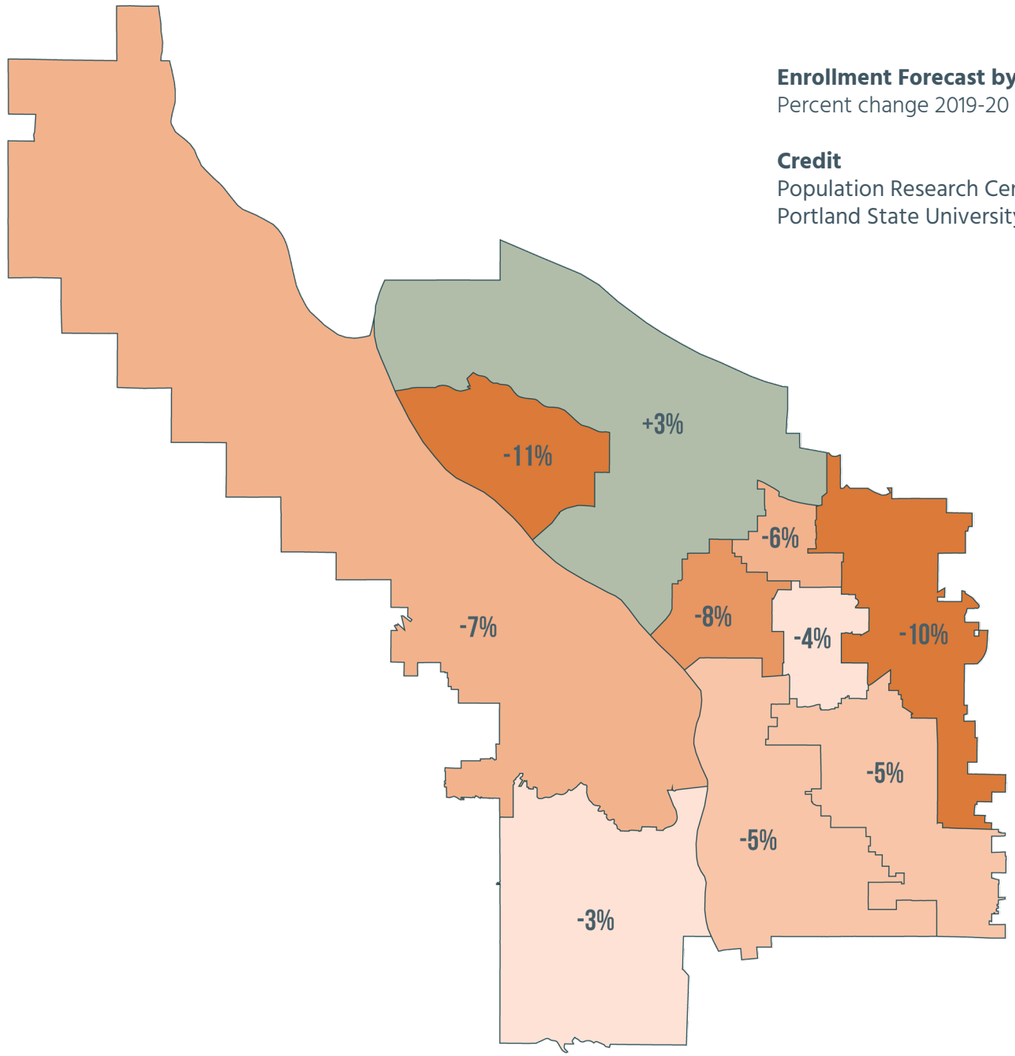
» The 2021-22 K-5 forecast of 22,944 is a decline of over 600 students from 2019-20, and net losses in elementary grades continue for several more years. K-5 enrollment reaches a low of 20,928 in 2027-28. K-5 enrollments begin to grow in 2028-29, ending the 15-year forecast period with 23,843 students in 2035-36, a few hundred students more than their pre-pandemic 2019-20 level.

Middle

» Between 2019-20 and 2021-22, enrollment in middle schools is predicted to drop a trivial amount: just 14 students for an enrollment of 11,118 students. Subsequent years, however, will trend down due to lower birth rates, driving enrollment to a low of 9,370 in 2031-32. Growth in the last few years of the forecast results in a 2035-36 forecast of 10,206 — about 900 students below the pre-pandemic 2019-20 level.

High

» The 2021-22 forecast of 14,587 high schoolers represents a more than 600 student gain from 2019-20. Growth will continue, reaching a peak of 15,168 in 2024-25, before steadily declining throughout the remainder of the forecast horizon. High school enrollment of 12,820 in 2035-36 is more than 1,100 less than in pre-pandemic 2019-20.



Enrollment Forecast by Cluster
Percent change 2019-20 to 2035-36

Credit
Population Research Center,
Portland State University, April 2021.

Enrollment Change by Cluster

» The projected enrollment change will not be uniform across the district. Using 2019-20 a base year comparison, most clusters are forecast to decline in enrollment. Areas in north Portland are a notable exception. See figure 5 for a percent change in enrollment for each cluster.

» Several clusters are forecast to see K-12 enrollment figures in 2021-22 that slightly exceed 2019-20 totals. These include Franklin, Grant, Jefferson-McDaniel, Jefferson-Roosevelt, and Wells-Barnett. However, only the Jefferson-McDaniel and Jefferson-Roosevelt clusters are expected to experience a net gain of K-12 district residents over the 16-year period ending in 2035-36. Jefferson-McDaniel increases by 98 students while Jefferson-Roosevelt increases by 127 students. The Grant cluster is expected to have a relatively small loss of 20 students, and Wells-Barnett has 164 fewer K-12 residents in 2035-36 than in 2019-20.

» The remaining clusters are forecast to have net declines of more than 200 students between 2019-20 and 2035-36. These losses occur at Cleveland (-261), Franklin (-382), Jefferson-Grant (-206), Lincoln (-206), McDaniel (-497), and Roosevelt (-432). For most of these clusters, the 2035-36 totals reflect a slight K-12 enrollment increase from their lowest figures occurring in or near the 2029-30 school year. Reflecting district-wide trends influenced by the decline in births, elementary grades in each cluster generally experience their most considerable net losses in the first half of the forecast period. In contrast, middle and high school grades experience a more significant decline after 2027-28. Figure 5 summarizes the forecasts for high school clusters for 2020-21 through 2035-36.

DETERMINING UTILIZATION

Utilization is a planning metric to understand enrollment in the context of the constraints governing school operation. The size and number of classrooms is one example of a constraint; teacher planning periods and specialized classroom use are others. Neither the utilization percent nor the capacity numbers presented here represent the maximum number of students that can be accommodated in a school. The number of students enrolled at a school may be higher or lower than its capacity.

Capacity and utilization should be used as one among many measures of the relative crowding for a building. A school's utilization is best understood as a high-level measure of how well the building area supports the student population.

The utilization calculation described here is based on physical constraints around operating a school. Classrooms are assigned a student count based on area: classrooms between 500 - 800 square feet are assigned 24 students; classrooms between 800 - 1000 square feet are assigned 27 students; classrooms above 1000 square feet are assigned 30 students.

After multiplying the number of students assigned to each classroom by the total number of classrooms in the building, we have the school's gross capacity. Gross capacity is an unrealistic student number as it fails to account for the realities of scheduling a school day. Teacher planning periods, specialized classrooms (e.g., science labs, art rooms) mean that not all instructional spaces are used every period of every day. To account for these operational constraints, a common set of room set-asides, or classrooms excluded from the utilization calculation based on special programs and supports, are subtracted from the gross capacity. Examples of classroom set-asides include:

K-5 & K-8

- computer labs
- gyms
- learning center
- SPED focus classroom (where present)
- 1-2 Art/Music rooms, per staffing formula
- early childhood (where present)
- leased classrooms (where present)
- hosts a co-located Immersion program (where present)
- operates as a neighborhood K-8 (where present)

Middle & High School

- learning center
- SPED focus classroom (where present)
- 1-2 Art/Music rooms, per staffing formula
- early childhood (where present)
- leased classrooms (where present)

Next, a configuration-specific utilization rate is applied. The utilization rates identify how much of the gross capacity is being used. Most schools do not use 100 percent of the available student capacity. Instead, program needs at each school may require the use of traditional instructional spaces for non-instructional purposes such as resource rooms, counselors, and therapists, among other uses.

Utilization rates, like the classroom set-asides, are different at elementary schools and K-8s than at middle and high schools. Generally, K-5s and K-8s are more efficient from a scheduling perspective because students change classrooms infrequently at these grade-levels; the utilization rate for these configurations is one-hundred percent. Contrasted with K-5 and K-8 configurations are the inherently more complex middle school and high school configurations, wherein students (and sometimes teachers) change classrooms each period; the utilization rate for these configurations is 85%.

To further acknowledge scheduling complexity and increased staffing, utilization rates for all configurations are broadly reduced for Title I schools (five-percent) and for TSI/ CSI designations (again, five-percent).

The result of these deductions is the school's functional capacity or the student count used for planning purposes. The calculation is summarized below:

❶ CLASSROOM DATA × STUDENT STATION BRACKETS = **GROSS CAPACITY**

❷ GROSS CAPACITY − CLASSROOM SET-ASIDES × UTILIZATION RATE = **FUNCTIONAL CAPACITY**

❸ FUNCTIONAL CAPACITY / ENROLLMENT = **SCHOOL UTILIZATION**

FACILITY CONDITION

FACILITY CONDITION

Portland Public Schools manages approximately 9 million square feet of building area across 700 acres of real estate. See the table below for an overview of the configuration, count, and gross square footage of district sites.

The facilities in the district's portfolio have been in service anywhere from less than two years to nearly 120 years. Newer facilities have few immediate needs for repair or reinvestment. The older facilities have aged components beyond their service life, which are obsolete or no longer energy efficient. Many facilities have received at least partial reconstruction since their initial construction date.

In addition to permanent structures, the district operates 71 modular buildings, totaling 131 classrooms and over 200,000 SF Net instructional area. Like the permanent building portfolio, these modulars are aged: on average, the installation date of district modulars is 1980.

BUILDING AGE

Building age, in particular, is an important determinant for the condition of district buildings. Nearly one-half of district buildings were constructed before World War II. Many of these structures still operate systems from their original construction date. The risk of system failure in these buildings is high, to say nothing of the maintenance and energy costs associated with operating older building systems. The table above outlines the significant growth periods in school construction.

BUILDING CHARACTERISTIC	COUNT	YEAR/ PERCENT
AVERAGE PRIMARY CONSTRUCTION DATE	-	1944
MEDIAN PRIMARY CONSTRUCTION DATE	-	1949
CONSTRUCTED BEFORE 1930	38	39%
CONSTRUCTED BETWEEN 1930 AND 1960	42	43%
CONSTRUCTED BETWEEN 1961 AND 1990	9	9%
CONSTRUCTED AFTER 1990	9	9%

The facility condition assessment data outlined primarily reflects an aged building stock and further demonstrates the magnitude of capital investment necessary to align the district's physical infrastructure with modern design and construction standards.

CONFIGURATION	COUNT	BUILDING GSF	AVERAGE GSF	LAND AREA (ACRES)	AVERAGE LAND AREA (ACRES)
HS	11	3,069,291	279,026	161.5	14.7
MS	15	1,492,426	99,495	142.22	9.5
ADMIN	5	527,245	105,449	34.3	6.9
K-5	45	2,817,167	62,604	251.0	5.6
K-8	11	728,039	66,185	54.7	5.0
SPECIAL SERVICES	6	226,943	37,824	27.3	4.6
LEASED	2	66,782	33,391	4.7	2.3
EARLY LEARNERS	3	87,370	29,123	5.6	1.9

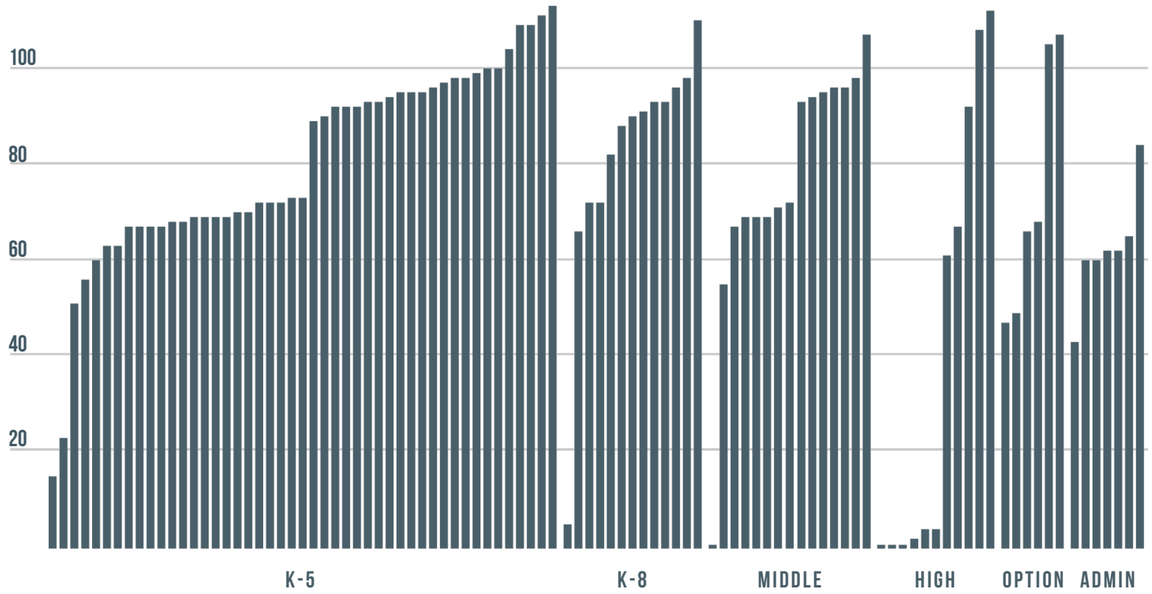
In addition to age-related degradation, older school facilities were generally not designed to accommodate contemporary models of teaching and learning. Building, and more specifically classroom configurations were typically designed to support one teacher with a group of 20-30 students, providing limited flexibility for individualized instruction, project-based learning, or support for a variety of student group sizes.

Administrative spaces also provide little flexibility, offering few spaces for private conversations and other administrative supports. Likewise, shared facilities, such as cafeterias, gymnasiums, and restrooms are often undersized and reflect antecedent cultural norms.

HISTORIC BUILDINGS

A historic assessment was conducted in 2009 of Portland Public Schools' facilities. Research and a field study of district buildings identified their character-defining features, assessed their comparative levels of historical integrity and evaluated their eligibility for the National Register of Historic Places (NRHP). Of the 98 properties surveyed, three are listed in the National Register as contributing resources to NRHP Historic Districts (HD): Abernethy (Ladd's Addition HD), Couch/ MLC (Alphabet HD) and Irvington (Irvington HD). Three schools (Benson, Duniway, and Woodstock) are listed as Portland Landmarks, and three schools are considered contributing resources to City of Portland Conservation Districts (Kenton, Woodlawn, and Jefferson).

FIGURE 6 DISTRICT BUILDING AGE (YEARS)



EXISTING FACILITY CONDITION

In the Spring of 2019, Portland Public Schools began a comprehensive Facility Condition Assessment (FCA) of district-owned assets covering 8.1M gross square feet across 94 educational sites.

The objective of the FCA was to accomplish the following goals:

- Calculate Facility Condition Index (FCI) Scores for buildings, including FCI scores for individual systems.
- Prioritize building systems based on need, observed deficiencies, remaining useful life, and classify each system based on a recommended timeframe for when these systems should be replaced.
- Create one central depository of data on critical building systems
- Update previous Americans with Disabilities Act (ADA) Accessibility Studies

Following the assessments, a recommended corrective action for each observed deficiency was developed. If an action was required within four years, remedial repairs were priced and given a severity category and priority.

The result of the FCA is a database of system deficiencies with estimated remedial costs. It provides the groundwork for analysis that supports the district's institutional planning and decision-making process by making accurate facility information accessible. The database also enables the district to generate multi-year capital spending plans to implement the proposed upgrades and replacements.

These data are intended to serve as the foundation for strategic planning around physical infrastructure, ultimately supporting Portland Public Schools' ongoing mission to elevate our community's health, dignity, and well-being.

ASSESSMENT OVERVIEW

The findings of the FCA are based on nationally recognized facility condition assessment approaches, methods, and best practices to evaluate the physical condition of educational and support structures. The assessment included all permanent buildings, site and ground features, athletic fields, athletic facilities, and other permanent administrative, maintenance, warehouse, or ancillary buildings such as storage or equipment buildings. The study did not include seismic assessments due to the invasive nature of this work. Future planning team should consider seismic cost in addition to the building system repair costs documented as part of the facility condition assessment.

To ensure consistency in the collected data, the assessment team evaluated district assets using pre-established, standardized criteria. All assessments were performed per ASTM E2018 guidelines. Documents reviewed in preparation for the investigation included district work order data, floorplans, historical reports, and previous ADA assessments.

AECOM personnel and sub-consultants conducted the physical condition assessment of the buildings and grounds and prepared the overall findings. In addition, AECOM incorporated the local knowledge and expertise of district maintenance and operations representatives, custodians, and extensive input from facility operations managers to develop individual facility assessment reports and findings.

The data was collected without intrusion, relocation, removal of materials, exploratory probing, use of specialized protective clothing, or any special equipment (lifts, fall protection, etc.) and did not necessitate lockout/tag-out procedures. In situations where roofs were not accessible, recommendations were developed based on the walk-through assessment of the interior, vantage points from higher building elevations nearby (if possible), dialogue with onsite personnel, and stakeholder feedback information such as roof age and known issues.

Team members utilized the system age and observed deficient conditions to assess the building systems. Each system was rated from one to five according to the system age and observed deficiencies, with a rating of five being 'Excellent.'

The facility condition assessment documented the condition of 15k assets. Of those assets, approximately 7k deficiencies, including ADA, were recorded and priced. Assets with the highest associated costs were

related to heat-generating systems, followed by elevators, lifts, and distribution systems. Nearly three-quarters of all deficiencies were categorized as "Aged – Exceeded Design Life." To be sure, a significant portion of district infrastructure is well beyond its intended design life; assets installed in the 1920s or 1950s present a high risk for continued reliability and serviceability.

FACILITY CONDITION INDEX

The facility condition index (FCI) is the ratio of a building's maintenance costs relative to replacing the building at current construction costs. FCI values range from 0.00 (Good) to 1.00 (Critical). A higher FCI indicates a greater need for remedial funding relative to the facility's replacement value.

As a standardized scale, the facility condition index is a practical basis for strategic facilities capital planning. Metrics such as the FCI give stakeholders the ability to compare the condition of similar buildings to each other, as well as establish target condition ratings. Comparing buildings against a standardized scale also highlights the buildings in the greatest need of investment.

This analysis can be used to see trends, compare the outcomes of short-term, lower-budget repairs with mid-to-long-term, higher-cost rehabilitations. The rehabilitation and replacements often require more substantial strategy and investment that take place over the long term. However, operations and maintenance, repair, and minor rehabilitation can be used to extend asset and building lives, resulting in cost savings over the long-term, up to a threshold of where O&M costs outweigh the capital investment in replacing an asset or building. This threshold will differ by strategy, constraints and drivers, and capabilities. The findings here provide the information on which to base investment decisions in these contexts.

FIGURE 7 FACILITY CONDITION INDEX DESCRIPTIONS

FACILITY CONDITION INDEX	DESCRIPTION
0.01 - 0.05	GOOD
> 0.05 - 0.1	FAIR
> 0.1 - 0.3	POOR
> 0.3 - 1	CRITICAL

FIGURE 8 DISTRICT FACILITY CONDITION INDEX SCORES

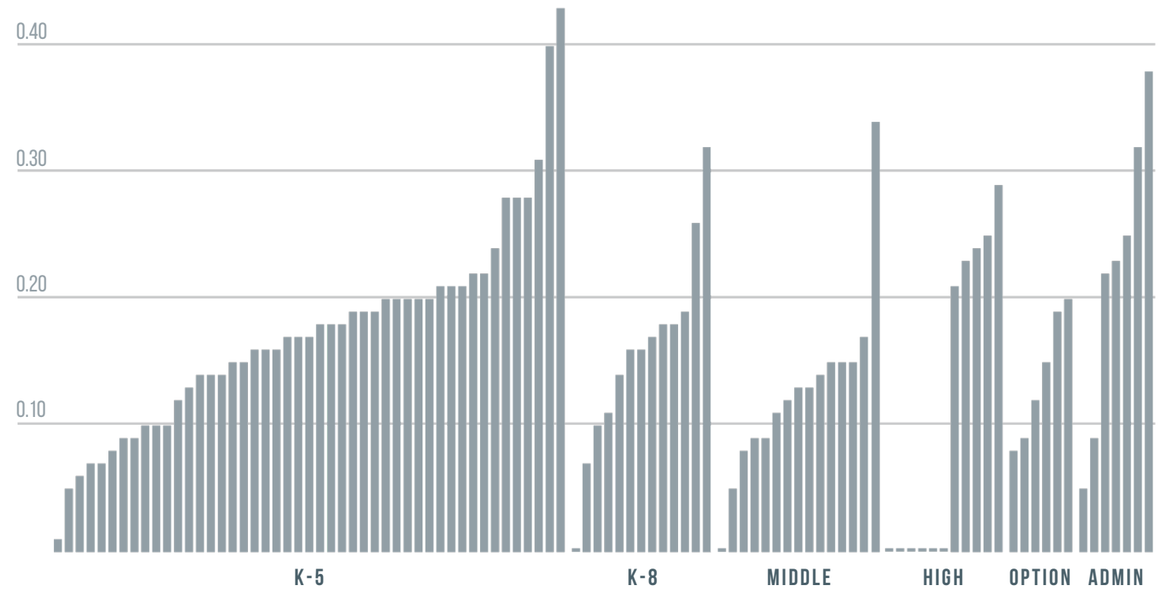
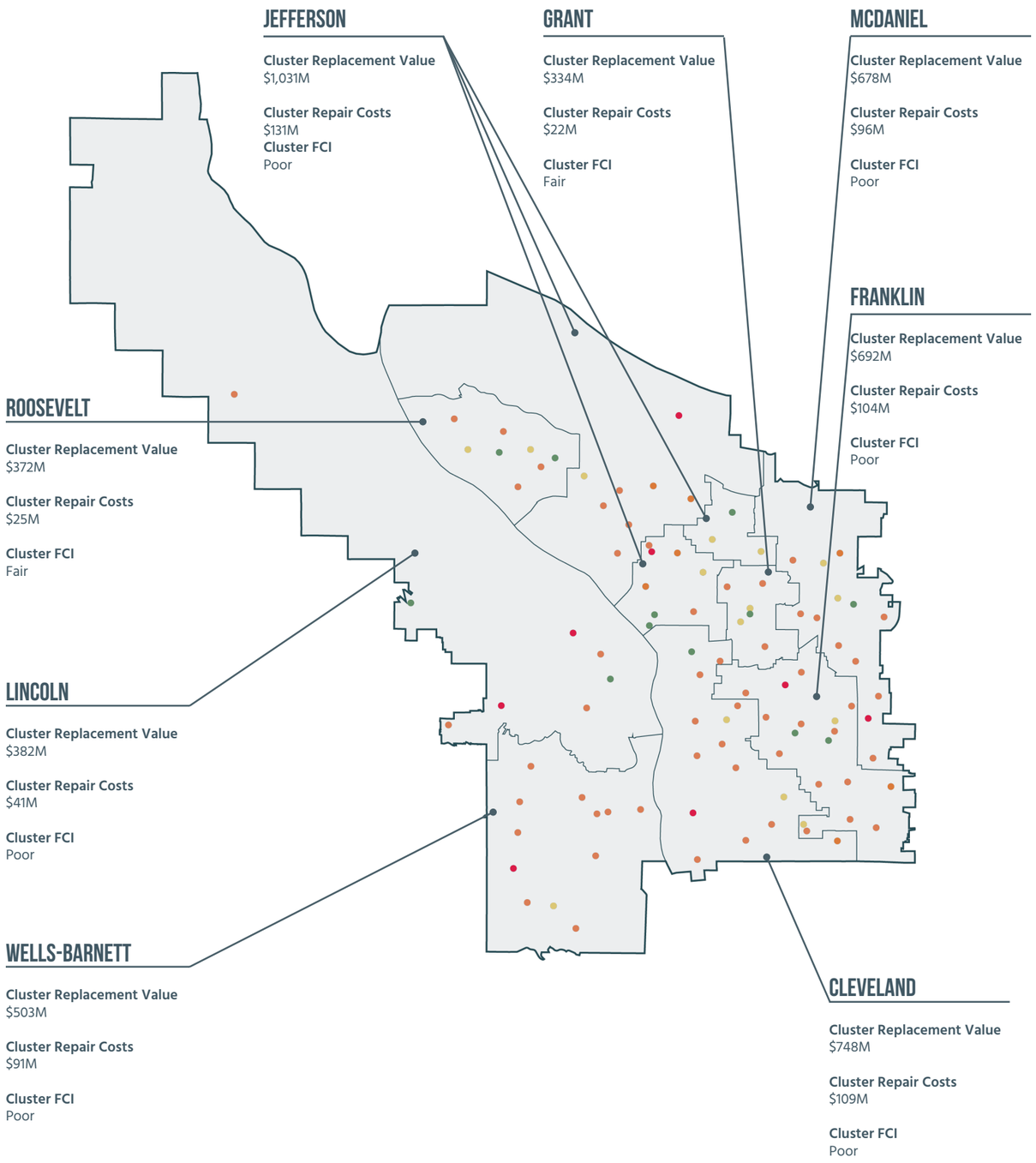


FIGURE 9. FACILITY CONDITION BY CLUSTER



KEY FINDINGS

The district average FCI is 0.16, or colloquially, "poor." Sixty-two facilities rated poor or critical of the ninety-four sites assessed. As a ratio of building repair costs vs. building replacement cost, building repair costs can sometimes exceed building replacement costs. The metric used here to indicate a higher repair cost over a replacement cost is 0.30 or "critical." Buildings with FCIs higher than 0.30 are strong candidates for full modernization.

The decision to modernize vs repair aging structures must be made in the context of the specific deferred maintenance, the district's RESJ and educational goals, and enrollment forecasts. The facility condition index score should never be the sole measure of modernization or large-scale renovation.

The following tables indicate facility condition needs by configuration (figure 10) and cluster (figure 11); condition data for individual sites can be found in the last section of this document, Capital Forecasts and on the district's website (pps.net/fca).

Continuing a precedent established by previous Bonds, the facility condition information in this document is organized by configuration. Situating building condition data in the context of configuration-specific educational vision is necessary background for facility planning.

FIGURE 10 FACILITY CONDITION BY CLUSTER

	TOTALS		GOOD		FAIR		POOR		CRITICAL	
CLUSTER	COUNT	AREA (SF)	COUNT	AREA (SF)	COUNT	AREA (SF)	COUNT	AREA (SF)	COUNT	AREA (SF)
CLEVELAND	14	1,420,379	1	371,189	2	153,753	10	843,233	1	52,204
FRANKLIN	20	1,437,943	2	404,829	2	61,707	15	911,313	1	60,094
GRANT	6	623,925	1	303,271	2	104,356	3	216,298	-	-
JEFFERSON	19	1,940,093	3	678,050	5	378,975	9	798,504	2	84,564
LINCOLN	8	718,144	2	354,833	-	-	4	274,051	2	89,260
MCDANIEL	13	1,274,872	1	333,441	3	191,277	8	639,379	1	110,775
ROOSEVELT	8	701,714	2	334,582	2	105,008	4	262,124	-	-
WELLS-BARNETT	11	963,962	-	-	1	219281	10	744,681	-	-
TOTAL	**99**	**9,081,032**	**12**	**2,780,195**	**17**	**1,214,357**	**63**	**4,689,583**	**7**	**396,897**

FIGURE 11 FACILITY CONDITION BY CONFIGURATION

	TOTALS		GOOD		FAIR		POOR		CRITICAL	
CONFIGURATION	COUNT	AREA (SF)	COUNT	AREA (SF)	COUNT	AREA (SF)	COUNT	AREA (SF)	COUNT	AREA (SF)
ADMIN	5	527,245	1	419,802	1	29,800	2	36,568	1	41,075
EARLY LEARNERS	3	87370	-	-	2	59,585	1	27,785	-	-
HS	11	3,069,291	6	1,863,026	-	-	5	1,206,265	-	-
K-5	45	2,817,167	2	131,009	8	556,882	33	2,018,362	3	176,683
K-8	11	728,039	1	170,638	1	88,815	8	443,711	1	24,875
LEASED	2	66782	-	-	-	-	1	23,293	1	43,489
MS	15	1,492,426	2	195,720	3	411,423	9	774,508	1	110,775
SPECIAL SERVICES	6	226943	-	-	2	67,852	4	159,091	-	-
TOTAL	**99**	**9,081,032**	**12**	**2,780,195**	**17**	**1,214,357**	**63**	**4,689,583**	**7**	**396,897**

SEISMIC

Seismic safety should be considered as a state of rolling compliance. Like other empirical codes, seismic codes change based on observations following an earthquake. The first seismic codes were developed in 1976 when Western Oregon was thought to be a low-risk zone. As our understanding of the Cascadia subduction zone came into focus, our region was elevated to moderate, then later from moderate to high, following a string of earthquakes in the early aughts. Seismic requirements have changed as recently as October 2019.

All but a few district buildings were constructed before building codes reflected the current understanding of seismic risk. To be sure, the majority of district buildings were built before seismic codes existed at all.

In 2001, the State of Oregon passed law ORS 455.400, requiring all school buildings that pose an undue risk during a seismic event to meet a life safety performance objective by the year 2032, subject to available funding.

The magnitude of cost to align all district buildings with current seismic code cannot be overstated. While recent fluctuations in the construction market make the exact dollar amount challenging to estimate, previous estimates have placed the cost at more than one billion dollars.

Aligning our schools with seismic codes involves a network of improvements ranging from the highly invasive: roof replacements or structural bracing (both examples strengthen the building diaphragm against shear forces), to the minimally invasive: interior improvements to prevent hanging lights or mechanical ducts from falling on building occupants.

Primary among considerations when planning seismic work is coordination with other building improvements. Complete seismic retrofits often require the removal of internal and external walls and finishes, destructive testing, or subsurface investigations; significant costs can be saved by combining the seismic work with other invasive building improvements, if not full modernization or rebuild.

In light of the recent code changes and anticipation of future bond funding for seismic improvements, guidance from a structural engineer on best practices is recommended prior to further capital planning.

Summaries of seismic improvements completed or planned since 2012 are included below. Complete seismic reports can be found on the district's website.

SEISMIC WORK COMPLETED SINCE 2012

SITE	CONFIGURATION	YEAR	IMPROVEMENT TYPE
ALAMEDA AUDITORIUM	K-5	2013	INCREMENTAL SEISMIC IMPROVEMENT
BRIDLEMILE	K-5	2013	ROOF REPLACEMENT
LAURELHURST	K-8	2013	ROOF REPLACEMENT
WELLS-BARNETT	HS	2013	ROOF REPLACEMENT
ARLETA	K-5	2014	INCREMENTAL SEISMIC IMPROVEMENT
BEACH	K-5	2014	INCREMENTAL SEISMIC IMPROVEMENT
BOISE ELIOT	K-5	2014	INCREMENTAL SEISMIC IMPROVEMENT
CHIEF JOSEPH	K-5	2014	INCREMENTAL SEISMIC IMPROVEMENT
CRESTON	K-5	2014	INCREMENTAL SEISMIC IMPROVEMENT
GROUT	K-5	2014	INCREMENTAL SEISMIC IMPROVEMENT
HOSFORD	MS	2014	INCREMENTAL SEISMIC IMPROVEMENT
JAMES JOHN	K-5	2014	INCREMENTAL SEISMIC IMPROVEMENT
LANE	MS	2014	INCREMENTAL SEISMIC IMPROVEMENT
WOODLAWN	K-5	2014	INCREMENTAL SEISMIC IMPROVEMENT
AINSWORTH GYMNASIUM	K-5	2015	INCREMENTAL SEISMIC IMPROVEMENT
BUCKMAN	K-5	2015	INCREMENTAL SEISMIC IMPROVEMENT
CREATIVE SCIENCE	K-8	2015	INCREMENTAL SEISMIC IMPROVEMENT
LLEWELLYN	K-5	2015	INCREMENTAL SEISMIC IMPROVEMENT
MAPLEWOOD	K-5	2015	INCREMENTAL SEISMIC IMPROVEMENT
SABIN	K-5	2015	INCREMENTAL SEISMIC IMPROVEMENT
STEPHENSON	K-5	2015	INCREMENTAL SEISMIC IMPROVEMENT
ABERNETHY	K-5	2016	INCREMENTAL SEISMIC IMPROVEMENT
CLEVELAND	HS	2016	INCREMENTAL SEISMIC IMPROVEMENT
FRANKLIN	HS	2016	MODERNIZATION
JEFFERSON	HS	2016	INCREMENTAL SEISMIC IMPROVEMENT
MLC	K-12	2016	INCREMENTAL SEISMIC IMPROVEMENT
SELLWOOD	MS	2016	INCREMENTAL SEISMIC IMPROVEMENT
FAUBION	K-8	2017	BUILDING REPLACEMENT
ROOSEVELT	HS	2017	MODERNIZATION
GRANT	HS	2019	MODERNIZATION
MLK JR	K-5	2019	ROOF REPLACEMENT
RIGLER	K-5	2019	ROOF REPLACEMENT
LEWIS	K-5	2013 / 2019	INCREMENTAL SEISMIC IMPROVEMENT
HAYHURST	K-5	2015 / 2019	INCREMENTAL SEISMIC IMPROVEMENT

Data accessed from https://www.oregongeology.org/rvs/activity-updates/status.htm. Retrieved 2021 AUG 09

PROGRAM VISION

INTRODUCTION

The Long-Range Facility Plan project team met with district academic leaders from eleven (11) program areas to document programmatic capital priorities. Program representatives were provided with a list of questions before the interviews, allowing them to consult with their colleagues in developing responses.

The questions were intended to elevate the district's social justice and racial equity goals in the context of each respective program vision. All questions were inflected based on the specific academic program area.

Following the interviews, the project team organized responses into three sections: Program Vision, Facility Constraints, and Capital Forecasts. The capital forecasts were further divided into high, moderate, and low priorities.

Each program leader then had the opportunity to review, comment, and edit the text prior to appearing in this document.

TITLE	**COMMUNITY**
ARTIST	**SABINE KENNEY**
GRADE	**12**
SCHOOL	**GRANT HS**
TEACHER	**MELODY ROCKWELL**

ARTIST'S STATEMENT

Creating inclusive spaces in the coming years of PPS, in order to create community and growth is very important. I wanted to avoid western structures, as they are inherently discriminative based on the institutions they represent. In my painting I was inspired by indigenous longhouses. These were spaces of togetherness. They were used for living spaces, or gatherings. The floor plan is open, with all people on the same level. I feel these structures represent community, which is something that needs to be healed at Grant especially after Covid-19. Because I am white, I don't want to speak for POC at my school. I instead wanted to focus my work on the wellness of students, and working as a community. The birds represent both students and staff members working together to create community based learning. The roots at the bottom of the structure represent schools being the integral to the growth of societies.

EARLY CHILDHOOD EDUCATION

PROGRAM VISION & DESCRIPTION

- Provide the PPS community with a pk – 5 system that effectively transitions students from preschool to elementary grades through a seamless alignment of educational experiences, social-emotional supports, and community services.
- Provide developmentally appropriate indoor and outdoor spaces for early learners and their families, using Faubion and Clarendon as models.
- Promote access to quality, affordable child care among BIPOC and underserved communities through a mixed delivery system that works in concert with local providers.
- The district currently operates a total of 43 pre-k classrooma districtwide. In the 2020-21 school year, there are district-operated pre-k programs in 12 schools including; Boise-Elliott; Faubion; Lent; MLK Jr; Whitman; Grout; Jason Lee; Kelly Center; Creston Annex; and Sitton. Additionally, the district operates three (3) dedicated early learning facilities: Applegate, Clarendon, and Sacajawea.

FACILITY CONSTRAINTS

- Many schools lack developmentally appropriate spaces for early learners (e.g., access to dedicated child-scaled restrooms, sinks, dining areas).
- Some pre-k sites lack dedicated early childhood outdoor play areas (e.g., playgrounds, covered area, space for riding tricycles, etc.).
- Some pre-k sites lack sufficient office and meeting spaces for community partners, or a family gathering area.

CAPITAL FORECAST

High Priority

- Addition of two (2) pre-k classrooms at Lent and one (1) at MLK Jr. for the 2022-23 school year.
- Addition of two (2) pre-k classrooms on the southwest side. The program director has identified Markham Elementary as a potential location (based on neighborhood demand). Markham is projected to be at 73% utilization during the 2021-22 school year with fairly stable enrollment projected over the next five years. As such, there is sufficient space to convert two existing general classrooms into pre-k classrooms at this location.
- Addition of two (2) pre-k classrooms on the west side. The program director has identified Chapman Elementary as a potential location (based on neighborhood demand). Chapman is projected to be at 70% utilization during the 2021-22 school year; enrollment is projected to increase over the next five years, with an anticipated utilization rate of 74% by 2025-26. Even with the enrollment increase, there appears to be sufficient space to convert two existing general classrooms into pre-k classrooms at this location.
- Addition of at least two (2) pre-k classrooms at an inner southeast elementary school. Marysville K-5, Woodmere K-5, and Arleta K-5 are examples of schools in this area with low utilization and declining enrollment. As such, they might be potential candidates for pre-k classroom placement over the next five (5) years.

Moderate Priority

- Addition of dedicated early childhood outdoor play areas at all schools with inadequate or absent play areas. (Assessment needed).
- Facilities upgrades to pre-k classrooms at Sacajawea, Creston K-5, and Applegate School to support the needs of early learners. Of all the current pre-k locations, the program director identified Sacajawea and Creston as having the most significant facilities deficiencies relative to programmatic needs. Creston's overall building is in poor condition (FCI = 16%), whereas Sacajawea's overall building is in fair condition (FCI = 10%). Applegate includes a Native culture classroom that lacks the welcoming features provided at the Native Montessori program at Faubion K-8. Additionally, Applegate's overall building is in poor condition (FCI = 14%).
- Classroom size at Kelly Center and Boise Eliot makes appropriate programming difficult.

Lower Priority

- There is insufficient information to accurately discern long-term facilities needs for the Early Learners program.

ELEMENTARY SCHOOLS

PROGRAM VISION & DESCRIPTION

» Traditional one-size-fits-all approaches to elementary education are not effective for the majority of students (particularly BIPOC students). Elementary school programs and facilities should accommodate a hands-on approach to teaching and learning that emphasizes project-based learning and differentiated instruction. Project-based learning should be implemented along a pedagogical continuum that extends from elementary through high school.
» Elementary schools should have intentionally designed spaces to support skill development in visual and performing arts, science, and P.E.

FACILITY CONSTRAINTS

» Most elementary school buildings and sites lack spaces to support project-based learning.
» Nine (9) elementary schools lack a dedicated gymnasium. A shared cafegymatorium is provided, limiting its use.
» Most elementary schools lack a stage, limiting students' performing arts opportunities.
» Many elementary schools only have one (1) single-use restroom and this is typically reserved for staff.
» Most elementary facilities have outdated furnishings that are not conducive to flexible classroom arrangements.
» Many elementary schools lack adequate space for families and community partners.
» Smaller elementary schools (with lower student enrollment) cannot support the level of programming of larger elementary schools, creating disparities in accessing services.

CAPITAL FORECAST

High Priority

» Add or re-purpose space to provide a dedicated family resource center at every elementary school.
» Provide new flexible classroom furnishings and student seating options to allow elementary teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area at each elementary school to support STEM instruction and project-based learning.

Moderate Priority

» Classroom supports for project-based learning
» Construct a new, dedicated gymnasium (with stage) for the nine (9) elementary and K-8 schools with cafegymatoriums.
» Add air conditioning to elementary schools for improved year-round thermal comfort and indoor air quality.

Lower Priority

» Add gender-neutral restrooms to district elementary schools.

TITLE	**UNTITLED**
ARTIST	**ISA LLADOS**
GRADE	**7**
SCHOOL	**ROBERT GRAY**
TEACHER	**AMY STEEL**

ARTIST'S STATEMENT

I was inspired by constellations and the general idea space. As a student, the idea of exploring the unknown and uncharted excites me and drives me to learn and work hard. With my art piece I also tried to convey that not everything has to fit into a certain standard or be symmetrical and perfect.

MIDDLE SCHOOLS

PROGRAM VISION & DESCRIPTION

Portland Public Middle Schools should create an engaging learning environment that is safe and welcoming for a diverse student population, staff, and community. Our middle school buildings should create the learning conditions that provide students with the opportunities to obtain the attributes of the graduate portrait.

FACILITY CONSTRAINTS

- PPS middle school buildings do not have many specialized STEM or elective spaces. This is also true of intensive skills classrooms; many have been repurposed from old home economics rooms or other spaces.
- K-8 facilities were designed more like elementary schools, lacking some of the more specialized spaces typical of middle schools.
- Most middle schools only have one gym or even a cafegymatorium making it difficult or impossible to meet minimum P.E. activity requirements.
- Middle school classrooms have outdated furniture and built-in casework that limits flexibility.
- Many middle schools lack suitable spaces to support visual and performing arts classes.
- Many middle schools lack community rooms, dedicated spaces for community partners, and spaces that are welcoming or hospitable to visiting families.
- District Middle Schools would benefit from features such as purposeful outdoor gathering areas, improved indoor/outdoor connections (e.g., roll up doors), extended learning areas, classroom alcoves, and “brain break” spaces.

CAPITAL FORECAST

High Priority

- Conduct accessibility upgrades to ensure that all middle schools are accessible to students, teachers, and visitors with physical disabilities. This will allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Conduct site improvements at middle school campuses, including the addition of accessible, age-appropriate recreational play equipment and a covered play structure.
- Invest in flexible furnishings (e.g., student seating, desks) that support collaboration and the ability to quickly and easily reconfigure spaces for purposeful grouping, reteaching, and interventions.
- Align the Long Range Facility Plan and Educational Specifications with the final Middle School Redesign plan, ensuring that middle school facilities support the district’s vision for reimagining the middle school experience for PPS students.

Moderate Priority

- Continue modernizing middle schools, prioritizing multilevel buildings without elevators, including Beaumont, Gray, Ockley Green, Lane, and Sellwood.

Lower Priority

- There is insufficient information to accurately discern long-term facilities needs for middle school programs. The long-term capital forecast shall be revisited at the conclusion of the Middle School Redesign (MSR) process.

TITLE	**UNTITLED**
ARTIST	**OLIVIA WILSON**
GRADE	**6**
SCHOOL	**MT TABOR**
TEACHER	**MOLLY RENAUER**

ARTIST’S STATEMENT

My picture is an example of what a school that I would design. “Susan B. Anthony Middle School” is an environmentally safe school with paintings on the windows from children that go to this school. It also has a graffiti wall so the people that do graffiti art have a space for that, because everyone does art in a different way. There are a lot of different things to do outside like foursquare, basketball, kickball, soccer, and eat lunch.

HIGH SCHOOLS

PROGRAM VISION & DESCRIPTION

» Every high school should be in high demand with exceptional facilities and consistent educational offerings.

FACILITY CONSTRAINTS

» There is a stark discrepancy in facilities condition in modernized vs. non-modernized high school buildings.
» Most high school sites are greatly undersized with insufficient space for athletic fields.
» The layout and design of science labs do not support the evolution of STEM instruction.
» Some high schools are overcrowded whereas others are underutilized.

CAPITAL FORECAST

High Priority

» Complete modernization projects of remaining high schools.
» Add dedicated space(s) for community programs at each high school.
» Add space(s) to support social emotional health at every high school (e.g. calming room).

Moderate Priority

» Establish regional hubs for athletics, performing arts, and CTE programs.

Lower Priority

» Reassess district utilization methodology to incorporate scheduling shifts (e.g., flipped classrooms, asynchronous learning, comprehensive distance learning, etc.).

TITLE	**LINCOLN REIMAGINED**
ARTISTS	**KELSEY NITTA & MATTHEW LEI**
GRADE	**11**
SCHOOL	**LINCOLN**
TEACHER	**LILLY WINDLE**

ARTISTS' STATEMENT

At Lincoln, lots of students are sad to see features like the courtyard disappear as we move into the new building. Although the prompt was about new ideas, we wanted to depict the aspects of our school that have allowed us to build community for so many years. The crowded halls, library and the courtyard tree have been reimagined in little ways to highlight a space where students can really thrive and be creative! Places like the computer lab show the wide range of subjects students can choose. The globe is centered as a way to show the importance of having many ideas, cultures and beliefs mixed into one school. Well-being, inclusivity and community are all essential aspects to great space for students to learn.

ATHLETICS

PROGRAM VISION & DESCRIPTION

» Develop Multiple Athletic Hubs: Due to the undersized high school sites, the district will need to develop three (3) athletic hubs over the next 10 years to meet current and future athletic needs. Jackson, Marshall, and Whitaker-Adams are the preferred locations for the athletic hubs. See below for the desired athletic hub facilities, fields, and amenities.
» Athletic Upgrades to One (1) Middle School in each Cluster: Eight (8) middle school sites were identified (one in each cluster) for athletic facility upgrades. Each site should at minimum have a multipurpose turf field with a track, an appropriately sized main gym, and an auxiliary gym.

CLUSTER	SITE
CLEVELAND	HOSFORD MS
FRANKLIN	LANE MS
GRANT	BEAUMONT MS
JEFFERSON	OCKLEY GREEN MS
MCDANIEL	ROSEWAY HEIGHTS MS
ROOSEVELT	GEORGE MS
WELLS-BARNETT	JACKSON MS
LINCOLN	WEST SYLVAN MS

FACILITY CONSTRAINTS

» Most of the district's high schools are on small urban sites and lack the acreage to provide the athletic facilities and fields needed to support a comprehensive high school athletics program.
» Middle school facilities are outdated in terms of both indoor athletic facilities and outdoor spaces. The district is working to add more athletic program options at the middle school level and improve access; however, the level of demand exceeds available facility capacity/resources.
» There is a general lack of baseball/softball facilities on both the east and west sides of the district.
» BIPOC communities are disproportionately impacted by disparities in athletic facilities/fields. North Portland and Southeast Portland are the areas where upgrades are most needed.

CAPITAL FORECAST

High Priority

» Develop Jackson, Marshall, and Whitaker-Adams as athletic hubs.
» Athletic upgrades at four (4) middle schools: Lane, Ockley Green, George, and West Sylvan. Each site should at minimum have a multipurpose turf field with a track, an appropriately sized main gym and an auxiliary gym.
» Access to turf baseball and softball fields for all high schools (e.g., Franklin, Marshall).

Moderate Priority

» Athletic upgrades at four (4) additional middle schools: Hosford, Beaumont, Roseway Heights, and Harrison Park. Each site should at minimum have a multipurpose turf field with a track, an appropriately sized main gym and an auxiliary gym.

Lower Priority

» There is insufficient information to accurately discern long-term facilities needs for athletic programs.

HUB CONSTITUENCY

At minimum, each athletic hub site should provide:

» Double wide Field: football/soccer fields (two fields side-by-side) that can also serve baseball/softball
» Artificial turf
» Field lighting
» Bleacher seating around baseball/softball fields in the corners.
» Eight (8) competition tennis courts with exterior lighting

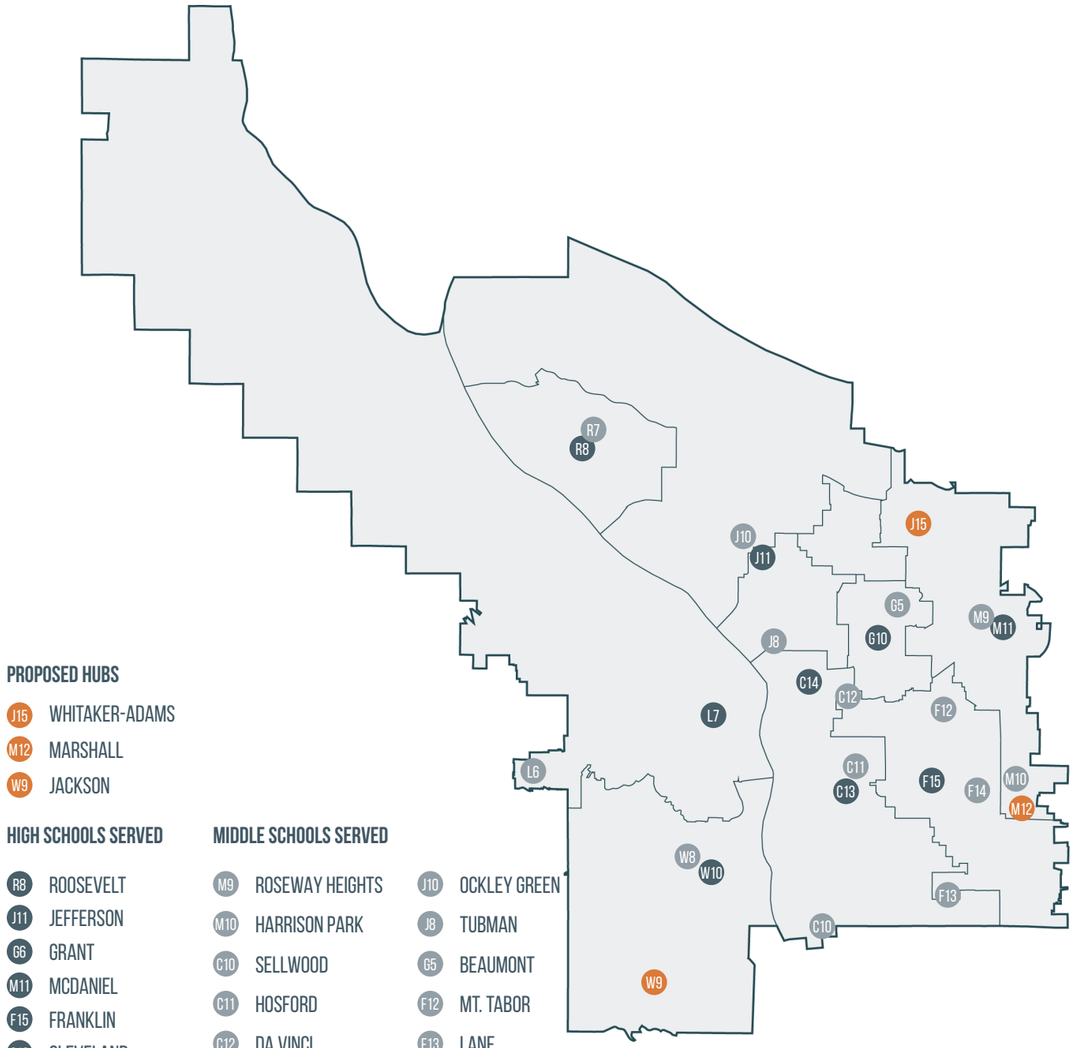
The following facilities are also highly desired at each athletic hub site:

» Main gymnasium and large auxiliary gymnasium.
» Multi Use space for basketball, wrestling, etc.

Additionally, the following athletic amenities may be provided at select athletic hub sites at the district's discretion based on funding availability, site features, public partnerships, and evolving programmatic needs:

» Multiple additional lit turf fields, including an upper baseball/softball field with track and one (1) multipurpose field
» Competition lap pool with 5-8 lanes
» Dance room
» Wrestling room / mat room

ATHLETIC HUBS



PROPOSED HUBS

- J15 WHITAKER-ADAMS
- M12 MARSHALL
- W9 JACKSON

HIGH SCHOOLS SERVED

- R8 ROOSEVELT
- J11 JEFFERSON
- G6 GRANT
- M11 MCDANIEL
- F15 FRANKLIN
- C13 CLEVELAND
- C14 BENSON
- L7 LINCOLN
- W10 WELLS-BARNETT

MIDDLE SCHOOLS SERVED

- M9 ROSEWAY HEIGHTS
- M10 HARRISON PARK
- C10 SELLWOOD
- C11 HOSFORD
- C12 DA VINCI
- L6 WEST SYLVAN
- W8 GRAY
- R7 GEORGE
- J10 OCKLEY GREEN
- J8 TUBMAN
- G5 BEAUMONT
- F12 MT. TABOR
- F13 LANE
- F14 KELLOGG

TOWARD A HUB MODEL

Like other urban districts, Portland Public School's sites are located on small parcels of land. This space constraint is especially challenging for athletics because of the program's intensive space needs.

The section on the previous page outlines the facility supports necessary for a comprehensive athletics program, including three tiers of regulation team competitions. Field areas are governed by the National Federation of State High School Associations (NFHS) standards. Most schools do not have enough land area for multiple fields, seating, and lighting. Across the high school portfolio, only McDaniel supports comprehensive athletics programming; even McDaniel presents scheduling challenges for a three-tiered athletics schedule.

As a shared resource across schools, hubs are a viable path toward expanding existing athletics programming and alleviating schedule constraints. The potential hub sites identified here collectively incorporate all areas of the district. Yet, because each hub is regionally distinct, the hub model is only successful if all three sites are developed. Omit one site, and the model only contributes to the existing programmatic imbalance.

In addition to their strategic geography, these hub sites have sufficient land area for multiple fields, spectator seating, and support buildings. Jackson is the largest site in the district with over 34 acres. Marshall is second with over 24 acres. Whitaker-Adams is the smallest of the hubs with 10 acres but is vacant and could be entirely committed to athletics programming.

MIDDLE SCHOOLS

The district is currently expanding athletics programming for middle schools. Student interest in middle school athletics far exceeds the available resources. But, like district high schools, middle school sites are constrained; few middle schools can support athletics based on the available site area.

Currently, middle schools rely on district high schools to support athletics programming, further stressing already over-scheduled facilities.

Hubs could provide the opportunity for young athletes to participate in programs not available at their schools, staging athletic success later in their academic path.

EXISTING PROGRAMS SUPPORTED

Below are the sites each athletics hub would serve with details on the existing programming compared against district standards for athletics programming. Many of our fields are shared between football and soccer, creating scheduling barriers for both programs.

Roosevelt (9)
The Roosevelt site supports one field shared by football and soccer with a track and another field shared between baseball and softball. Both fields are lit, and there is limited seating at the football/ soccer field. The field shared by baseball and softball is grass, while the football/soccer is turfed. Per district standards, both fields should be turf. A district hub model would support nine (9) programs at Roosevelt.

PROGRAM	SUPPORTED ON SITE	SUPPORTED AT HUB
FOOTBALL	PARTIAL - SHARED USE	YES (1)
TRACK	YES	YES (1)
BASEBALL	PARTIAL - GRASS/ SHARED USE	YES (1)
SOFTBALL	PARTIAL - GRASS/ SHARED USE	YES (1)
LACROSSE	NO	YES (2)
SOCCER	PARTIAL - SHARED USE	YES (2)
TENNIS	PARTIAL - 4 COURTS	NO
SWIM	NO	YES (1)

Jefferson (15)

The existing Jefferson site supports one field for football. The field is turf, has lighting, provides spectator seating, and has a track. The existing baseball/softball field is undersized for regulation team sports and is used only for practice. A district hub model would support fifteen (15) programs at Jefferson.

PROGRAM	SUPPORTED ON SITE	SUPPORTED AT HUB
FOOTBALL	PARTIAL - SHARED USE	YES (1)
TRACK	YES	YES (1)
BASEBALL	NO	YES (2)
SOFTBALL	NO	YES (2)
LACROSSE	NO	YES (2)
SOCCER	PARTIAL - SHARED USE	YES (4)
TENNIS	PARTIAL - 2 COURTS	NO
SWIM	NO	YES (2)
CROSS COUNTRY	NO	YES (1)

Cleveland (14)

The district owns the field three blocks east of Cleveland and supports football and soccer on a shared field. The field is lit and has spectator seating. No other programs are supported at Cleveland. A district hub model would support fourteen (14) programs at Cleveland.

PROGRAM	SUPPORTED ON SITE	SUPPORTED AT HUB
FOOTBALL	PARTIAL - SHARED USE	YES (1)
TRACK	YES	NO
BASEBALL	NO	YES (3)
SOFTBALL	NO	YES (2)
LACROSSE	NO	YES (2)
SOCCER	PARTIAL - SHARED USE	YES (4)
TENNIS	NO	NO
SWIM	NO	YES (2)

Wells-Barnett (16)

The adjacency to Reike Elementary School benefits the Wells-Barnett athletics program by supporting a dedicated soccer and softball field. The Wells-Barnett site supports football on a lit field with spectator seating, a grass multi-use practice field, and a grass baseball and softball field. A district hub model would support sixteen (16) programs at Wells-Barnett.

PROGRAM	SUPPORTED ON SITE	SUPPORTED AT HUB
FOOTBALL	YES	YES (1)
TRACK	YES	NO
BASEBALL	PARTIAL - UNLIT	YES (2)
SOFTBALL	PARTIAL - UNLIT	YES (1)
LACROSSE	YES	YES (2)
SOCCER	PARTIAL - OWNED BY PPR	YES (4)
TENNIS	PARTIAL - TWO COURTS	YES (2)
SWIM	PARTIAL - OWNED BY PPR	YES (2)
CROSS COUNTRY	NO	YES (2)

Franklin (13)

Franklin supports football and soccer on a shared field with lights and spectator seating. The north part of the site has a grass baseball field but without lights and no support for softball. Per district standards, the baseball field should be turfed and lit for full use of practice and game scheduling playtime. A district hub model would support thirteen (13) programs at Franklin.

PROGRAM	SUPPORTED ON SITE	SUPPORTED AT HUB
FOOTBALL	PARTIAL - SHARED USE	YES (1)
TRACK	YES	NO
BASEBALL	PARTIAL - UNLIT	YES (1)
SOFTBALL	NO	YES (2)
LACROSSE	PARTIAL - SHARED USE	YES (2)
SOCCER	PARTIAL - SHARED USE	YES (4)
TENNIS	NO	NO
SWIM	NO	YES (2)
CROSS COUNTRY	NO	YES (1)

Grant (14)

All athletics facilities for Grant are located on property owned by Portland Parks & Recreation. The Parks property supports one field for football and soccer, a multi-use field shared by baseball, soccer (practice), and Lacrosse. Construction of a softball field is planned for 2021-22. The site also supports tennis. No lighting or spectator seating is present. A district hub model would support fourteen (14) programs at Grant.

PROGRAM	SUPPORTED ON SITE	SUPPORTED AT HUB
FOOTBALL	PARTIAL - OWNED BY PPR	YES (1)
TRACK	PARTIAL - OWNED BY PPR	NO
BASEBALL	PARTIAL - OWNED BY PPR	YES (2)
SOFTBALL	PLANNED FOR 2021-22 (PPR)	YES (1)
LACROSSE	PARTIAL - OWNED BY PPR	YES (2)
SOCCER	PARTIAL - OWNED BY PPR	YES (2)
TENNIS	PARTIAL - 6 COURTS (PPR)	NO
SWIM	PARTIAL - OWNED BY PPR	YES (2)
WATER POLO	PARTIAL - OWNED BY PPR	YES (2)
CROSS COUNTRY	NO	YES (2)

McDaniel (9)

McDaniel supports most complete athletics programming across the high schools. The site supports a dedicated football field with lighting and spectator seating. A multi-use field is also shared across soccer, baseball, softball, and lacrosse. A district hub model would support nine (9) programs at McDaniel.

PROGRAM	SUPPORTED ON SITE	SUPPORTED AT HUB
FOOTBALL	PARTIAL - SHARED USE	YES (1)
TRACK	YES	NO
BASEBALL	PARTIAL - SHARED USE	YES (2)
SOFTBALL	PARTIAL - SHARED USE	YES (2)
LACROSSE	PARTIAL - SHARED USE	YES (2)
SOCCER	PARTIAL - SHARED USE	YES (2)
TENNIS	NO	NO
SWIM	NO	YES (2)

Benson (12)

The site adjacent to Benson is owned by Portland Parks & Recreation and supports two fields with a perimeter track. The Parks' site also supports four tennis courts. The Benson site supports no athletics programming. A district hub model would support twelve (12) programs at Benson.

PROGRAM	SUPPORTED ON SITE	SUPPORTED AT HUB
FOOTBALL	PARTIAL - OWNED BY PPR	YES (1)
TRACK	PARTIAL - OWNED BY PPR	NO
BASEBALL	PARTIAL - OWNED BY PPR	YES (2)
SOFTBALL	PARTIAL - OWNED BY PPR	YES (2)
LACROSSE	NO	YES (2)
SOCCER	PARTIAL - OWNED BY PPR	YES (2)
TENNIS	PARTIAL - 4 COURTS (PPR)	NO
SWIM	NO	YES (2)
CROSS COUNTRY	NO	YES (1)

Lincoln (29)

Phase II of the Lincoln modernization will include a lit field shared by football and soccer with spectator seating. The site will also support a small multi-use practice field. A district hub model would support twenty-nine (29) programs at Lincoln.

PROGRAM	SUPPORTED ON SITE	SUPPORTED AT HUB
FOOTBALL	PARTIAL - SHARED USE	YES (1)
TRACK	YES	NO
BASEBALL	NO	YES (3)
SOFTBALL	NO	YES (2)
LACROSSE	PARTIAL - HALF-SIZED FIELD	YES (4)
SOCCER	PARTIAL - SHARED USE	YES (6)
TENNIS	NO	YES (4)
SWIM	NO	YES (2)
WATER POLO	NO	YES (3)
RUGBY	NO	YES (2)
CROSS COUNTRY	NO	YES (2)

CAREER TECHNICAL EDUCATION

PROGRAM VISION & DESCRIPTION

- Offer thematically-based college and career pathways in PPS high schools, with each comprehensive school providing 3-6 vertically integrated pathways (depending on school size). Each pathway should offer a continuum of thematically aligned project-based learning opportunities that allow students to apply knowledge and skills from multiple content areas.
- Support interdisciplinary learning among core and CTE instructors though adjacencies.
- Focus on strengthening and improving existing CTE programs instead of adding new programs.
- CTE offerings at smaller alternative and CBO programs are limited, so a "hub" model would enable the district to expand CTE opportunities for these students.
- Comprehensive distance learning provides new opportunities. Some programming may be accomplished virtually or in hybrid format. This could expand the variety of CTE programs offered district-wide.
- The middle school redesign effort will include a pilot with a STEAM/CTE department to introduce middle school students to the high school CTE pathways. While makerspaces would be beneficial to this endeavor, there are no plans to construct CTE spaces at middle school facilities.

FACILITY CONSTRAINTS

- Construction facilities at Roosevelt and Lincoln fall short of industry-aligned programs.
- At Grant, exterior access is an issue, creating challenges with delivery of materials, etc.
- Jefferson, Cleveland, Ida B. Wells-Barnett, and Alliance all need interim CTE upgrades to ensure spaces can be effectively used until the facilities are modernized. For example, the culinary arts space at Cleveland is highly inadequate.
- Dust collection systems for construction programs,wood shops, manufacturing, transportation, design and applied arts, and engineering are inadequate. Simultaneously, the City is increasingly requesting dust hazard analyses. Standards have changed over the past 10 years.
- Water quality may be an issue in certain non-modernized schools with aging pipes and fixtures (e.g. culinary arts).
- The MPG building where Alliance will be housed has undersized CTE spaces (particularly shop areas).

CAPITAL FORECAST

High Priority

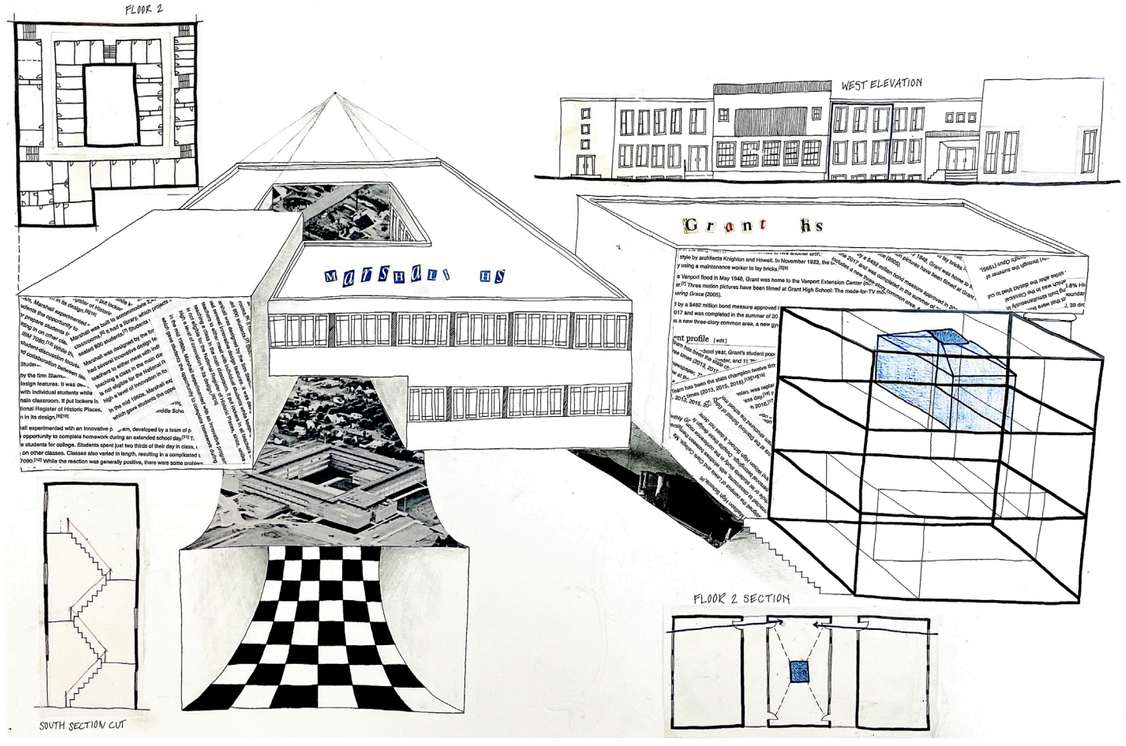
- Implement interim CTE upgrades at Jefferson, Cleveland, Ida B. Wells-Barnett, and Alliance to increase the usability of career technical spaces until these facilities can be fully modernized.
- Upgrade dust collection systems in all district wood shops to meet latest safety standards.

Moderate Priority

- Develop the Marshall campus as a district-wide CTE hub.
- Add a makerspace to every middle school to provide a project-based STEAM space that can support alignment with high school CTE pathways.

Lower Priority

- There is insufficient information to accurately discern long-term facilities needs for CTE programs.



TITLE	EDUCATIONAL EVOLUTION
ARTIST	PHILIP WEIMANN
GRADE	12
SCHOOL	GRANT
TEACHER	JAMIN LONDON TINSEL

ARTIST'S STATEMENT

I studied the history of architecture and tried to comprehend how the term "smart design" has changed over the years. I used two PPS high schools that I've attended as case studies, citing different architectural features and design elements that indicate their stage in the "evolution of design." I included collages and mixed media to juxtapose the clean, architectural lines.

MULTIPLE PATHWAYS TO GRADUATION

PROGRAM VISION & DESCRIPTION

- MPG's mission is to "provide educational options for all youth that empower, engage, and prepare them for college, work training, and global citizenship while serving as a vanguard for systemic educational change." MPG is the only PPS program that supports students from birth through age 21.
- The MPG program seeks to expand enrolled students' access to facilities that support project-based learning, visual and performing arts, CTE, and P.E./athletics in a manner that is comparable to offerings in neighborhood schools.
- Program representatives anticipate continued expansion of virtual learning, leading to a greater sense of fluidity in how, where, and when instruction occurs.

FACILITY CONSTRAINTS

- MPG programs support a very high number of underserved students facing significant educational and social emotional challenges, yet are relegated to leftover spaces that are far inferior to those provided at traditional schools.
- MPG's academic programming is limited to core academic areas in part because the programs lack access to specialized facilities such as visual and performing arts spaces, CTE areas, and P.E./athletic areas.
- MPG program staff often struggle to find private meeting rooms in schools, limiting their ability to work with students and families.
- Traditional classrooms are designed for "sit and get" model of instruction, which is not conducive to how most MPG students learn. Students are often enrolled in MPG programs because they were not well served by traditional educational models. They require interactive spaces that support project-based learning; however, current facilities do not provide this.
- Many schools lack adequate space for community partners, wraparound services, and family resources.
- Charter schools provide educational alternatives for underserved students, yet PPS lacks a formal application (criteria, process, timeline) for charters seeking to use PPS facilities.
- MLC is located in an aging elementary school facility that is inadequate for the school's K-12 student population.
- Ideally, there should be space in every PPS school facility for Virtual Scholars and Reconnection Centers. This is not currently provided, severely limiting students' access to these services.

CAPITAL FORECAST

High Priority

- Identify a location for the Virtual Scholars program, as well as a PPS Virtual School.
- Construction of new MPG building at Benson (bond-funded project).

Moderate Priority

- Provide MPG students with access to specialized learning and activity spaces by creating district-wide hubs for VAPA and athletics.
- Modernize the MLC building to meet educational programs needs for grades K-12, incorporating design features that support social-emotional needs and project-based learning activities.
- Provide a Family Resource Center with kitchen equipment within each school building, prioritizing Title I schools.
- Add a Reconnection Services office at every PPS school.

Lower Priority

- Program future school construction projects to have a dedicated Virtual Scholars area with instructional, office, and meeting spaces.

PHYSICAL EDUCATION

PROGRAM VISION & DESCRIPTION

» PPS' Physical Education (P.E.) program is shifting away from a sports-based model to a skill development model. The intent is to prepare students for embracing physical fitness across their lifespan. The sports-based model has proven to be unsustainable long-term as most people have few opportunities to participate in team sports later in life.

FACILITY CONSTRAINTS

» Many PPS elementary, K-8 and middle schools do not have sufficient space for P.E., even when there are adequate FTE assigned. At many schools, there is an insufficient number of P.E. teaching stations for students to complete their required weekly P.E. activity minutes.
» Nine (9) elementary schools lack a dedicated gymnasium. A shared cafegymatorium is provided, limiting its use for P.E. instruction.
» 50 elementary, K-8, and/or middle schools lack outdoor covered play areas.
» High schools lack a dedicated room or area for Adapted P.E.
» There is an overall lack of P.E. storage at most schools.

CAPITAL FORECAST

High Priority

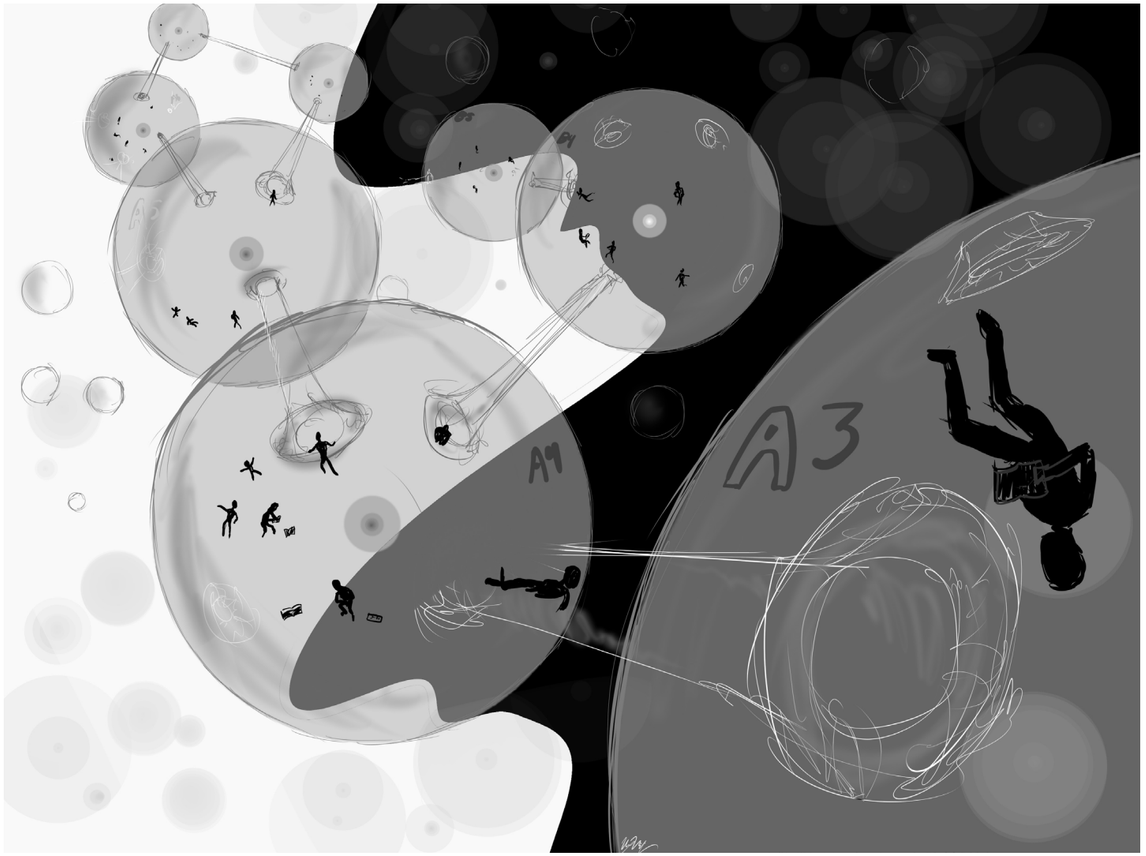
» For the nine (9) elementary schools without dedicated gyms, add or re-purpose space for a structured movement room (2,000 SF). Prioritize Title I schools in the order of construction. Currently, of the nine (9) schools without a dedicated gym, two (2) are Title I schools: Boise Eliot K-5 and Vestal K-5. If space for a structured movement area is unavailable, consider a covered play structure even if one already exists (see moderate priority below).
» Incorporate the recommendations of the PPS All Gender Task Force with regard to locker rooms (once finalized).

Moderate Priority

» For the 39 elementary and/or K-8 schools that currently lack a covered play area, add an outdoor covered area or construct/re-purpose a structured movement room (2,000 SF) at each site. Prioritize Title I schools in the order of construction. Currently, of the 39 elementary or K-8 schools without a covered play structure, 10 are Title I schools: 1) Chavez; 2) Harrison Park; 3) Lent; 4) MLK Jr.; 5) Roseway Heights; 6) Sitton; 7) Vestal; 8) Whitman; 9) Woodlawn; and 10) Woodmere.
» Construct a new, dedicated gymnasium for the nine (9) elementary and K-8 schools with cafegymatoriums.
» Provide all middle schools with an auxiliary gym and an outdoor covered activity area as part of the middle school modernizations.
» Add/re-purpose a smaller dedicated activity space for Adapted P.E. at each high school.

Lower Priority

» Expand P.E. storage at sites across the district.



TITLE	**BUBBLES**
ARTIST	**MAX MIYAHIRA**
GRADE	**11**
SCHOOL	**CLEVELAND**
TEACHER	**LEEANNE HEUBERGER**

ARTIST'S STATEMENT

This piece was created digitally. I created it to represent a school space that is extremely flexible and malleable. This space is entirely weightless, so people can go anywhere they want. Each room is a large bubble. The bubbles are connected by long tunnels that can disconnect and reattach to other bubbles. The entire structure is similar to how ideas are formed: we connect different things we come up with to things other people give us, and form a new bubble that other people can join and support. People can go to other bubbles through the tunnels to spread knowledge and ideas they learn in the bubbles they leave behind. Most of the time, people who are teaching others will stay in their own bubble, so people can join them and learn the same thing that other people learned. As more people learn more things and travel to new bubbles, the structure starts to look like the inside of a brain, with bubbles passing information to the next like neurons.

PLAYSPACES

PROGRAM VISION

Portland Public Schools is moving toward more inclusive play spaces with particular consideration for our community members with disabilities.

Through inclusive playground design, our communities hold the potential to promote authentic inclusion, improve access to developmentally appropriate play and advance health equity for all individuals.

We believe that an outdoor play environment intentionally designed with diverse and flexible play opportunities based on universal design principles best supports every child in finding a suitable play experience. The combination of play experiences within the play environment creates a socially accessible setting that supports inclusion for all students.

Playgrounds are where kids learn indelible social lessons, and too often, students with disabilities are segregated from their peers by physical barriers.

Finally, district playgrounds tacitly communicate values of inclusion and accessibility to the public and the broader community.

FACILITY CONSTRAINTS

The legal protections for individuals with disabilities are necessary but are built on narrow concepts of disability — primarily around motor disorders. Such concepts of disability fall well below the requirements for genuine inclusivity and fail to meet the motor, sensory, and cognitive needs of many members of our community.

Play equipment considered compliant and accessible by federal standards may support transfer from a mobility device to the play structure but fails to meaningfully support independence for many of the complex bodily states of many of our students.

The ADA does not include provisions for accessible playgrounds. Accessible paths to play equipment must be provided, but the play equipment and structures themselves are not required to be accessible per federal requirements.

The district has developed a supplemental set of standards to meet this essential need in our community. These standards were developed in collaboration with the disability community, district teachers and administrators, and inclusive design experts.

CAPITAL FORECAST

High Priority

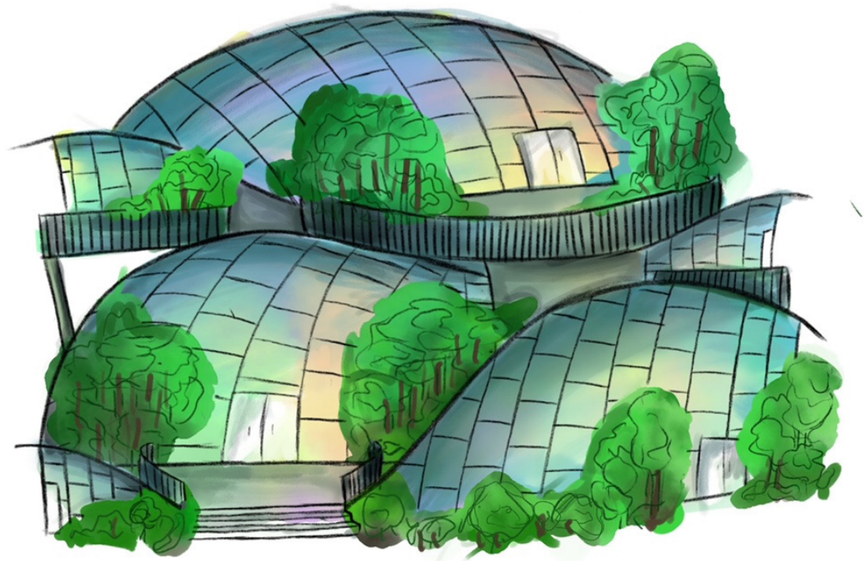
» Playspace improvements aligned with district standards at all Title I, TSI, and CSI elementary schools.

Moderate Priority

» Playspace improvements aligned with district standards at all elementary schools.

Lower Priority

» Playspace improvements aligned with district standards at all middle schools.



TITLE	UNTITLED
ARTIST	ELEANOR HAUGO
GRADE	8
SCHOOL	ACCESS ACADEMY
TEACHER	ANN MARIE SZOK

ARTIST'S STATEMENT

I want my work to be something that is clear, like a clear path forward. My building is made of big lines and curves, balconies and undefined spaces. It isn't forced into straight lines and old ideas. It is free flowing. My building is full of nature and windows blurring the lines between outdoors and indoors. It is multicolored and flows out of the space. I want to inspire optimism and an abstract calmness.

SECURITY SERVICES

PROGRAM VISION & DESCRIPTION

» The vision or approach to school security has three (3) main components: 1) physical infrastructure (cameras, access control, intrusion); 2) human capital (CSAs, human resources); and, 3) training / supplies / materials (critical incident training, radios, emergency supplies, etc.).
» Historically, the department has functioned as more of a response team. However, the department is increasingly seeking to use prevention/intervention techniques instead of immediately moving to a punitive mindset.

FACILITY CONSTRAINTS

» The district has made significant investments in upgrading the physical security of school buildings in recent years. Additionally, the 2020 bond includes funding for access control and surveillance upgrades at many schools.
» Non-modernized buildings often have main offices positioned in the center of the school, making it difficult for staff to effectively monitor the main entry.
» Secure entry vestibules are not provided at many non-modernized school buildings.
» Sprawling building layouts (e.g. Franklin) create supervision and access control challenges, particularly with limited campus safety associates (CSAs).
» Security systems in most buildings are not fully integrated, creating operational inefficiencies.

CAPITAL FORECAST

High Priority

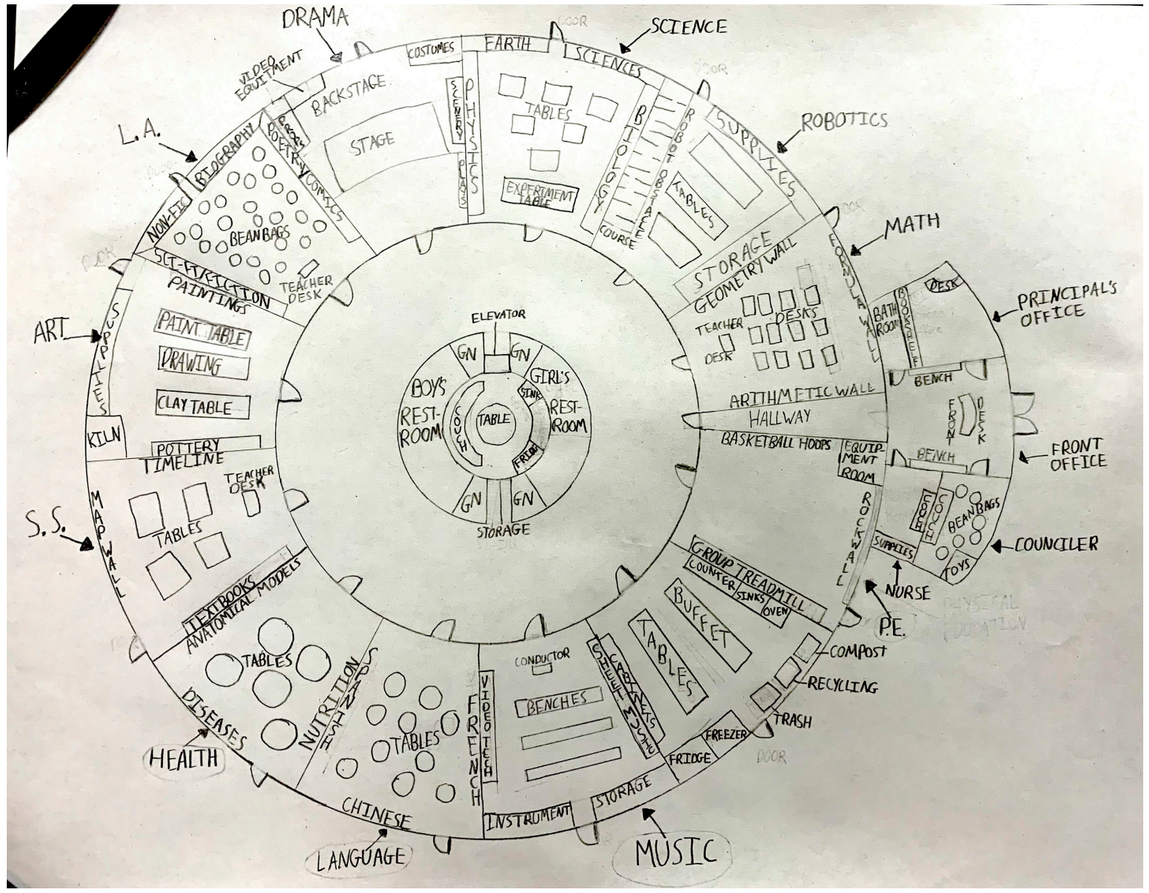
» Complete all 2020 bond-funded security projects including installation of new classroom door locks, as well as new or expanded security camera systems and intrusion alarm systems in non-modernized schools.

Moderate Priority

» In non-modernized schools, relocate main offices so that they are adjacent to the main entry.
» Renovate the main entries of non-modernized schools to align with the district's Educational Specifications.
» Add a dedicated security office at each middle and high school (where absent).

Lower Priority

» Increase the number and geographical distribution of facilities designed to an immediate occupancy seismic performance level, providing structures in each cluster that can serve as community shelters following a major seismic event or natural disaster.



TITLE	**MIDDLE SCHOOL**
ARTIST	**MABEL GALE**
GRADE	**8**
SCHOOL	**ROSEWAY HEIGHTS**
TEACHER	**CARRIE O'TOOLE**

ARTIST'S STATEMENT

The Mabel Faye Ring Academy is designed so everything the school needs is inside the main circle, with the exception of the front office area. The classrooms surround and open onto a ring-shaped courtyard. There is a small circular building in the center that has the restrooms and storage, and the staff lounge located on the second floor. The courtyard is where the students eat lunch, have recess, and walk from class to class. There is a retractable roof that can be extended to provide shelter, and heaters located throughout the courtyard for cold days. This way, it can be used all year. The outer wall of the courtyard is a hydroponic garden, growing both flowers and food and giving the area a nature-like feel. One main strength of the school's design is that it is incredibly safe. Any unwelcome visitor would have to get into the front office, through the hallway to the courtyard (which can be locked at both ends), and from there into a classroom. The classrooms each have an exit on the back wall, which lets the students leave quickly if there is a fire. From the outside, the door would look like a normal section of wall. It can only be opened from the inside. All classrooms have skylights for natural lighting, which makes the school more energy-efficient. Altogether, the design of Ring Academy is to promote student creativity and well-being by the natural flow of the space.

SPECIAL EDUCATION

PROGRAM VISION & DESCRIPTION

» District-wide implementation of inclusivity model for SPED: The SPED program is moving toward an inclusive model for special education where students with disabilities receive most of their instruction and services within general classrooms. This approach will bring more SPED students, instructors, and service providers into general classrooms, with potential capacity impacts. The inclusion model also presents an opportunity to reimagine SPED focus classrooms as a fluid, adaptable service vs. self-contained learning environments.
» Support instruction of SPED students within their neighborhood schools: The district aspires to serve a greater proportion of students with disabilities within their neighborhood schools, providing a consistent, uninterrupted continuum of services to SPED students as they transition between elementary, middle, and high school programs. This will require additional focus classrooms and SPED support spaces at select PPS schools (particularly at the elementary level).

FACILITY CONSTRAINTS

» There is an insufficient number of inclusive spaces accessible to students with disabilities spaces across PPS schools to accommodate the wide continuum of physical, social, cognitive, and behavioral needs within the special education student population (particularly at the elementary level). This has led to an inability to serve students in their neighborhood schools, as well as a lack of continuity in services across elementary, middle, and high schools. Schools need to be equipped with flexible, nimble spaces that can respond to enrollment fluctuations and the changing needs of students.
» Undersized SPED focus classrooms and learning center spaces are present at many schools. In some cases, SPED occupies "leftover" spaces that were not intentionally designed to support programmatic needs.
» Many schools lack access to an ADA accessible restroom that is appropriately sized, equipped, and/or positioned for use by students with disabilities or Special Education staff (e.g. changing table, shower, individual storage for restroom supplies / change of clothing).
» Some multistory school buildings lack elevators, limiting their ability to serve students with disabilities.
» Many schools lack a designated safe, quiet space for students with disabilities to practice self-regulation skills.
» Some schools have focus classrooms without access to water (e.g. sinks, restrooms, and/or drinking fountains.

CAPITAL FORECAST

High Priority

» Conduct an analysis to determine enrollment and capacity impacts of fully implementing an inclusion model while accommodating most students with disabilities within their neighborhood schools.
» All buildings must support a continuum of services for students with disabilities
» Evaluate spatial impacts of adopting a SPED inclusion model as part of the PPS Middle School Redesign and/or Educational Specifications processes.
» Add a dedicated sensory motor support room to every PPS school building (where not already present).
» Provide a minimum of one (1) multipurpose SPED focus classroom at every elementary school in the district, equipped with a sink (where possible) as well as a restroom per district Ed Specification.
» SPED focus classroom renovations and/or additions at the middle and high schools to create a dedicated series of multipurpose spaces that can be adapted to serve a range of needs and services per district Ed Specification.

Moderate Priority

» Add at least one "wellness" room or space to every school (where not already present).

Lower Priority

» There is insufficient information to accurately discern long-term facilities needs for the SPED program.

PROGRAM SPACE REQUIREMENTS

All configurations should support:
» At least two classrooms
» One of the two classroom must have a sink
» Sensory motor space
» "Break space" or wellness space
» Accessible restroom

VISUAL & PERFORMING ARTS

PROGRAM VISION & DESCRIPTION

The vision for visual and performing arts at PPS schools includes the following:

- Every student should have access to a comprehensive arts education.
- Schools should provide adequate time, space and resources for deep, sequenced learning – from introduction to mastery across multiple grade levels.
- Schools should provide real-world environments for art education in a way that is similar to CTE instruction. This is particularly important as students move toward the mastery level.

FACILITY CONSTRAINTS

- Although funding for arts education has increased in recent years, there are not adequate facilities to support program growth. Most facilities are not equipped to support a comprehensive art education.
- The VAPA program is continuing to "asset map" to understand what all those spaces look like today, what types of equipment they have, storage availability, etc. to determine where they might expand program offerings.

PROGRAM FORECAST

High Priority

- One (1) music classroom configured and equipt per current Ed Specifications at every elementary school.
- One (1) visual arts space configured and equipt per current Ed Specifications with a working, properly ventilated kiln at every elementary school.
- Addition of art exhibition space or area at every elementary, middle and high school.
- Black box theater or flexible performance space in every middle school.
- Centralized VAPA storage facility to house art equipment and supplies, consumables, class sets of musical instruments, theater costumes and props, and other items.

Moderate Priority

- Two (2) art teaching stations in every middle school (2D and 3D).
- Separate, band and choir rooms configured and equipt per current Ed Specifications in every middle school with shared ensemble/practice rooms, music office, and music library.

Lower Priority

- Performing arts focus-magnet school and/or hub with a full range of visual and performing arts spaces, including a 1,000 seat theater.

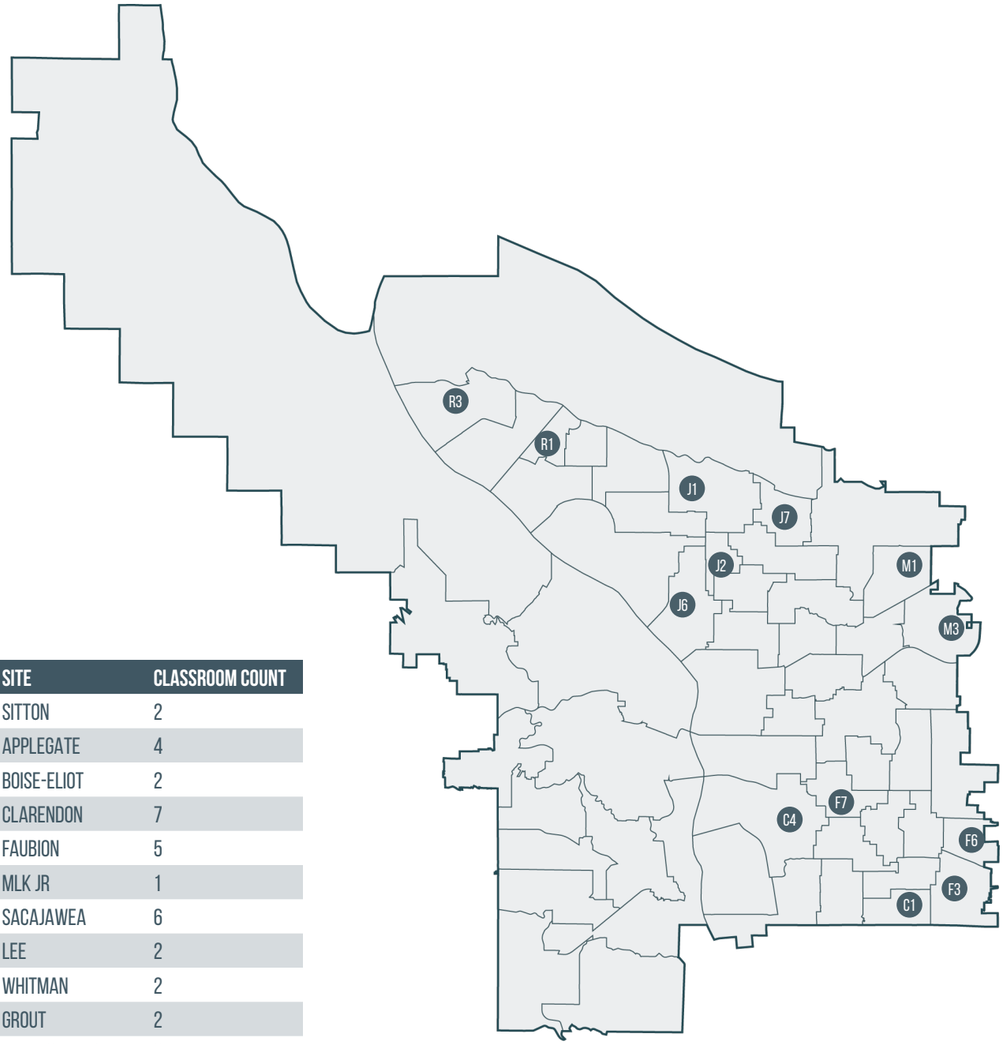
TITLE	**LANE REIMAGINED: A FAIRY'S BACKYARD**
ARTIST	**LILY ANSLINGER**
GRADE	**8**
SCHOOL	**LANE**
TEACHER	**TRACY MIRANDA**

ARTIST'S STATEMENT

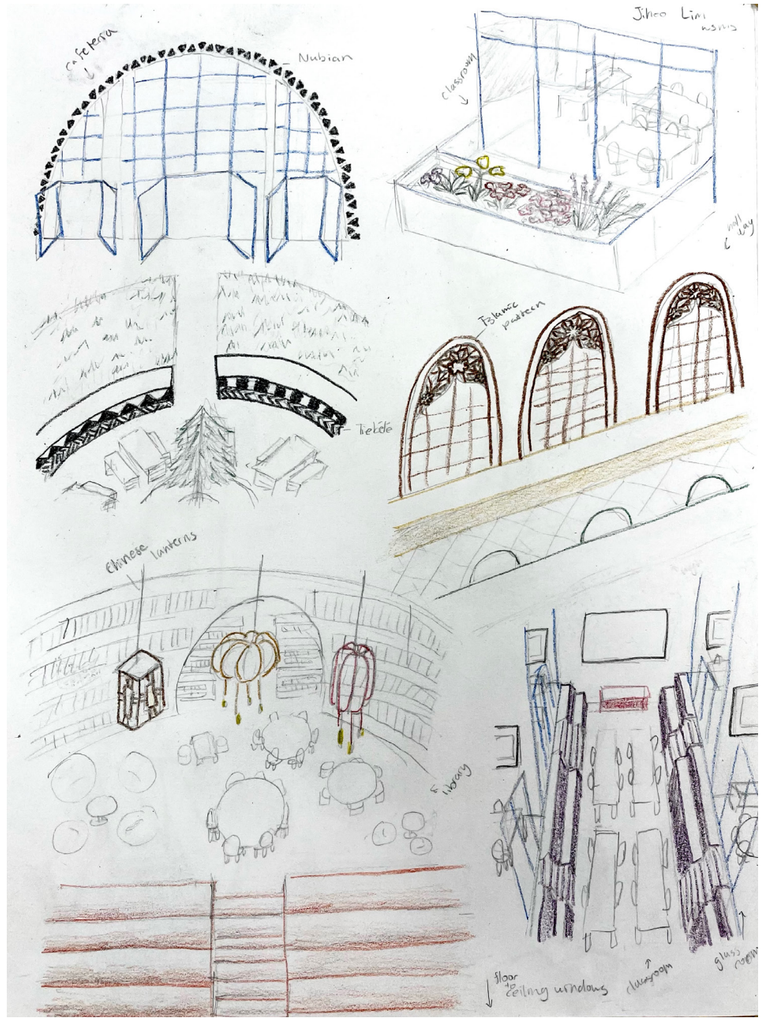
Lane MS is reimagined and overgrown with plants, life, and acceptance.

CAPITAL FORECASTS

EARLY CHILDHOOD EDUCATION



REF	SITE	CLASSROOM COUNT
R3	SITTON	2
J1	APPLEGATE	4
J6	BOISE-ELIOT	2
R1	CLARENDON	7
J7	FAUBION	5
J2	MLK JR	1
M1	SACAJAWEA	6
M3	LEE	2
C1	WHITMAN	2
C4	GROUT	2
F3	KELLY CENTER	6
F7	CRESTON ANNEX	4

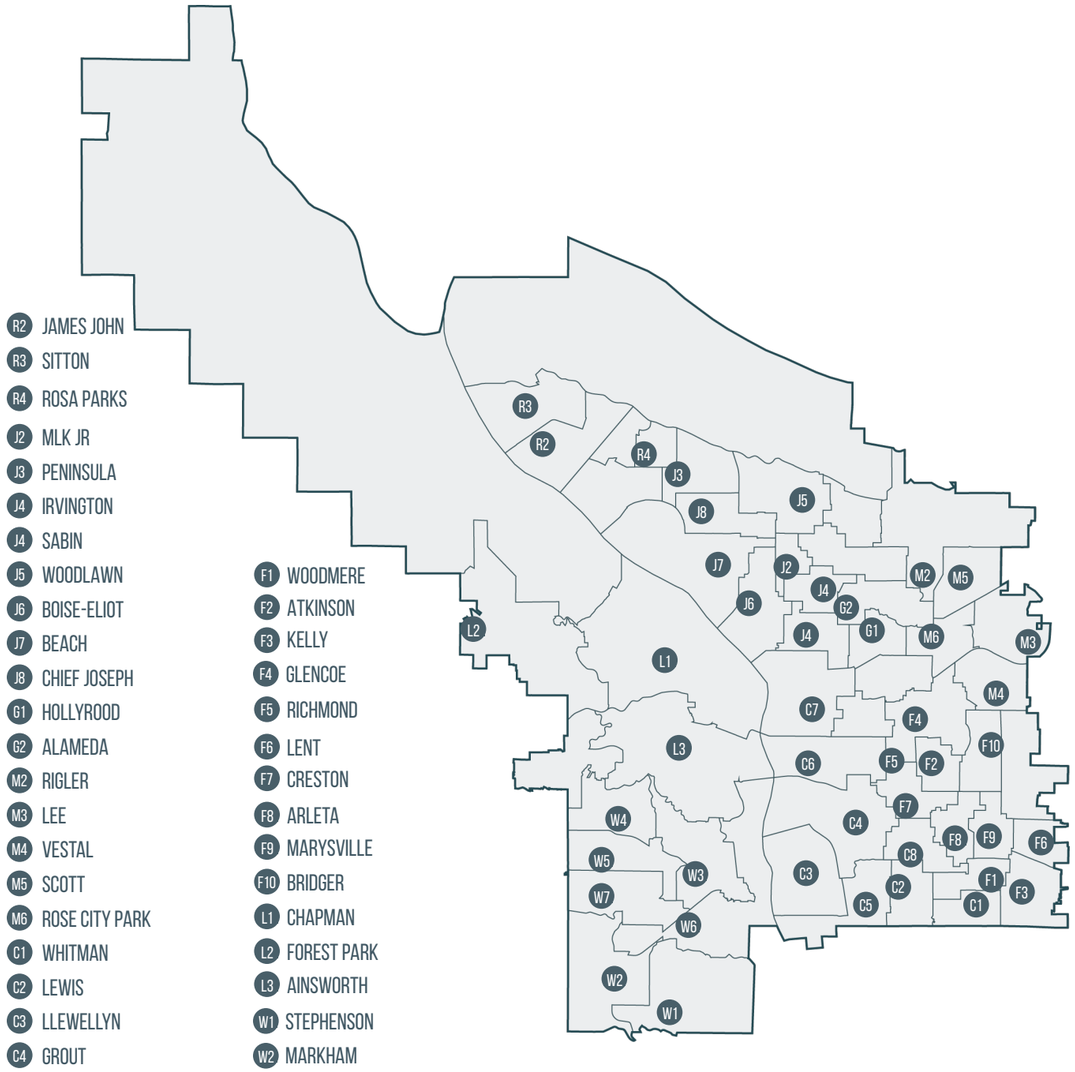


TITLE	**UNTITLED**
ARTIST	**JULIA LIM**
GRADE	**8**
SCHOOL	**WEST SYLVAN**
TEACHER	**ANNE LARSEN**

ARTIST'S STATEMENT

My architectural design is developed to promote collaborative learning, such as discussions, rather than individuals learning in isolation. The spaces are meant to prompt creativity and encourage relaxation. Some of the decorative details include cultural traditions that celebrate a diversity of world cultures.

ELEMENTARY PROGRAMS



- R2 JAMES JOHN
- R3 SITTON
- R4 ROSA PARKS
- J2 MLK JR
- J3 PENINSULA
- J4 IRVINGTON
- J4 SABIN
- J5 WOODLAWN
- J6 BOISE-ELIOT
- J7 BEACH
- J8 CHIEF JOSEPH
- G1 HOLLYROOD
- G2 ALAMEDA
- M2 RIGLER
- M3 LEE
- M4 VESTAL
- M5 SCOTT
- M6 ROSE CITY PARK
- C1 WHITMAN
- C2 LEWIS
- C3 LLEWELLYN
- C4 GROUT
- C5 DUNIWAY
- C6 ABERNETHY
- C7 BUCKMAN
- C8 WOODSTOCK
- F1 WOODMERE
- F2 ATKINSON
- F3 KELLY
- F4 GLENCOE
- F5 RICHMOND
- F6 LENT
- F7 CRESTON
- F8 ARLETA
- F9 MARYSVILLE
- F10 BRIDGER
- L1 CHAPMAN
- L2 FOREST PARK
- L3 AINSWORTH
- W1 STEPHENSON
- W2 MARKHAM
- W3 RIEKE
- W4 BRIDLEMILE
- W5 HAYHURST
- W7 MAPLEWOOD

CAPITAL FORECAST

District elementary schools range in building age from the recently constructed (Rosa Parks, 2006) to buildings more than a century old (Richmond, 1908). The average elementary school is 81 years old — six years older than the overall district average.

Building conditions are likewise worse than the district average: 0.18, slightly above the district's average (0.16). Chapman, Llewelyn, and Glencoe are in the poorest condition. These schools are among the seven district buildings in critical condition.

The expanding presence of early childhood education should be foremost when considering potential capital investments in elementary schools. Long-term forecasts for pre-kindergarten enrollment are challenging to predict — funding is awarded annually — but voters in Multnomah County supported Measure 26-214 in November 2020, extending early childhood education to all children across the County over the next ten years.

ENROLLMENT & UTILIZATION

Elementary school enrollment is expected to remain stable through 2036, growing modestly by just over one percent (1%). One crucial unknown within the enrollment forecasts is the enduring implications of the pandemic on elementary enrollment, especially on kindergartens. Nationally, kindergarten enrollment dropped between 15-20% due to families' decisions around distance learning; Portland was no exception: Kindergarten enrollment fell 16% during the pandemic.

Enrollment forecasts suggest all elementary schools will remain within their built capacity throughout the forecasted range. Ainsworth stands out at the high end of utilization and is expected to remain above ninety percent (90%) through 2031.

Four elementary schools stand out at the lower end of the utilization range: Lent, Whitman, Rosa Parks, and Vestal will fall below forty percent (40%) utilization. Careful monitoring of these schools would be prudent, particularly for the ongoing work of Enrollment and Program Balancing.

ACCESSIBILITY

District's ADA Transition Plan identifies multi level access at elementary schools in phase IV. Each phase identifies specific sites to focus investments, creating a holistic, accessible educational opportunity for our students over time.

Phases I and II of the Transition Plan are funded through the 2020 Bond. Phase III includes elevators at middle schools and K-8s. Elevators at Elementary Schools are included in the final phase.

During community listening sessions for the ADA Transition Plan, the disability community raised important considerations around accessibility that exceeded the narrow scope of the ADA; relevant for elementary schools and foremost in the dialogues were accessible and inclusive playgrounds. The community noted playgrounds are where young students learn indelible social lessons, and too often, students with disabilities are segregated from their peers by physical barriers.

Future Bond Planning Committees should make specific recommendations around project timing based on a clearer understanding of the district's bonding capacity, community support, and competing needs.

KEY

Historically Underserved Students

≥ 40%
≥ 20%
≥ 0%
NO DATA

Percent of school population who identifies as: Black or African American, American Indian and Alaska Native, Native Hawaiian and Other Pacific Islander, Some Other Race, Two Or More Races, Hispanic or Latino.

Credit
Department of System Planning And Performance - Portland Public Schools. 2021-2022 SY.

School Population by Free & Reduced Lunch

≥ 40%
≥ 20%
≥ 0%
NO DATA

Percent of school population who are eligible for Free Meals via Direct Certification

Credit
Department of System Planning And Performance - Portland Public Schools. 2021-2022 SY.

Building Accessibility

MULTI LEVEL WITHOUT ELEVATOR

SINGLE LEVEL OR EXISTING ELEVATOR

Note: Few schools in the district's building portfolio meet the guidelines of the American's with Disabilities Act. Elevators are indicated here because of the magnitude of building intervention.

Building Condition

FACILITY CONDITION INDEX

PRIMARY BUILDING AGE IN YEARS

CONFIGURATION MATRIX

SORTED BY DESCENDING FACILITY CONDITION INDEX

	FACILITY CONDITION INDEX	PRIMARY BUILDING AGE IN YEARS
CHAPMAN	0.43	98
LLEWELLYN	0.40	93
GLENCOE	0.31	98
GROUT	0.28	94
IRVINGTON	0.28	89
LENT	0.28	72
MAPLEWOOD	0.28	73
BRIDGER	0.24	70
KELLY	0.24	69
ARLETA	0.23	92
HAYHURST	0.21	67
VESTAL	0.21	92
WOODMERE	0.21	67
ALAMEDA	0.20	99
BOISE-ELIOT	0.20	95
CAPITOL HILL	0.20	104
LEWIS	0.20	69
RICHMOND	0.20	113
BUCKMAN	0.19	100
CHIEF JOSEPH	0.19	72
MARKHAM	0.19	70
MARYSVILLE	0.19	100
ATKINSON	0.18	68
WHITMAN	0.18	67

KEY

Historically Underserved Students

≥ 40%
≥ 20%
≥ 0%
NO DATA

Percent of school population who identifies as: Black or African American, American Indian and Alaska Native, Native Hawaiian and Other Pacific Islander, Some Other Race, Two Or More Races, Hispanic or Latino.

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MULTI LEVEL WITHOUT ELEVATOR

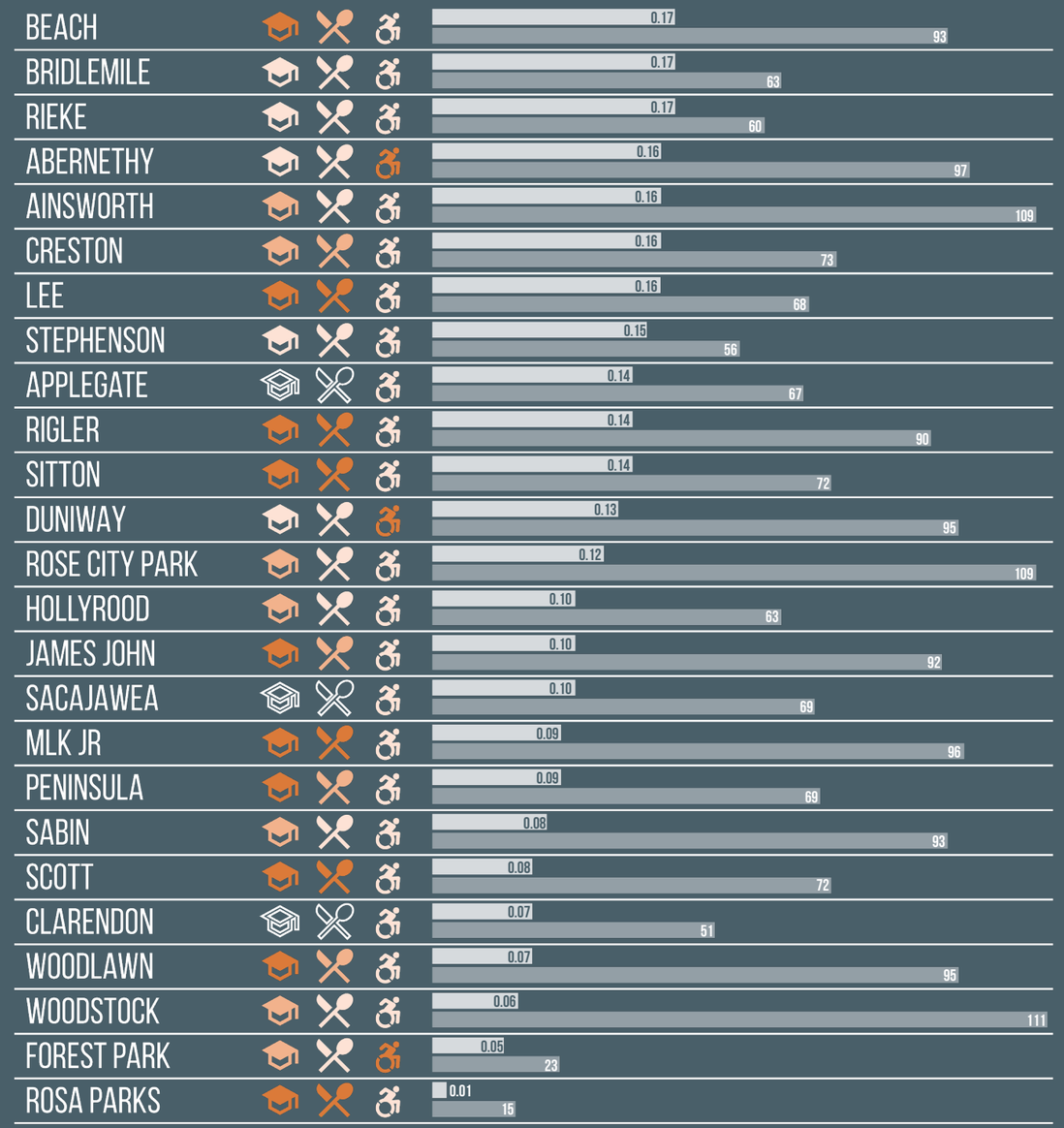
SINGLE LEVEL OR EXISTING ELEVATOR

Note: Few schools in the district's building portfolio meet the guidelines of the American's with Disabilities Act. Elevators are indicated here because of the magnitude of building intervention.

Building Condition

FACILITY CONDITION INDEX

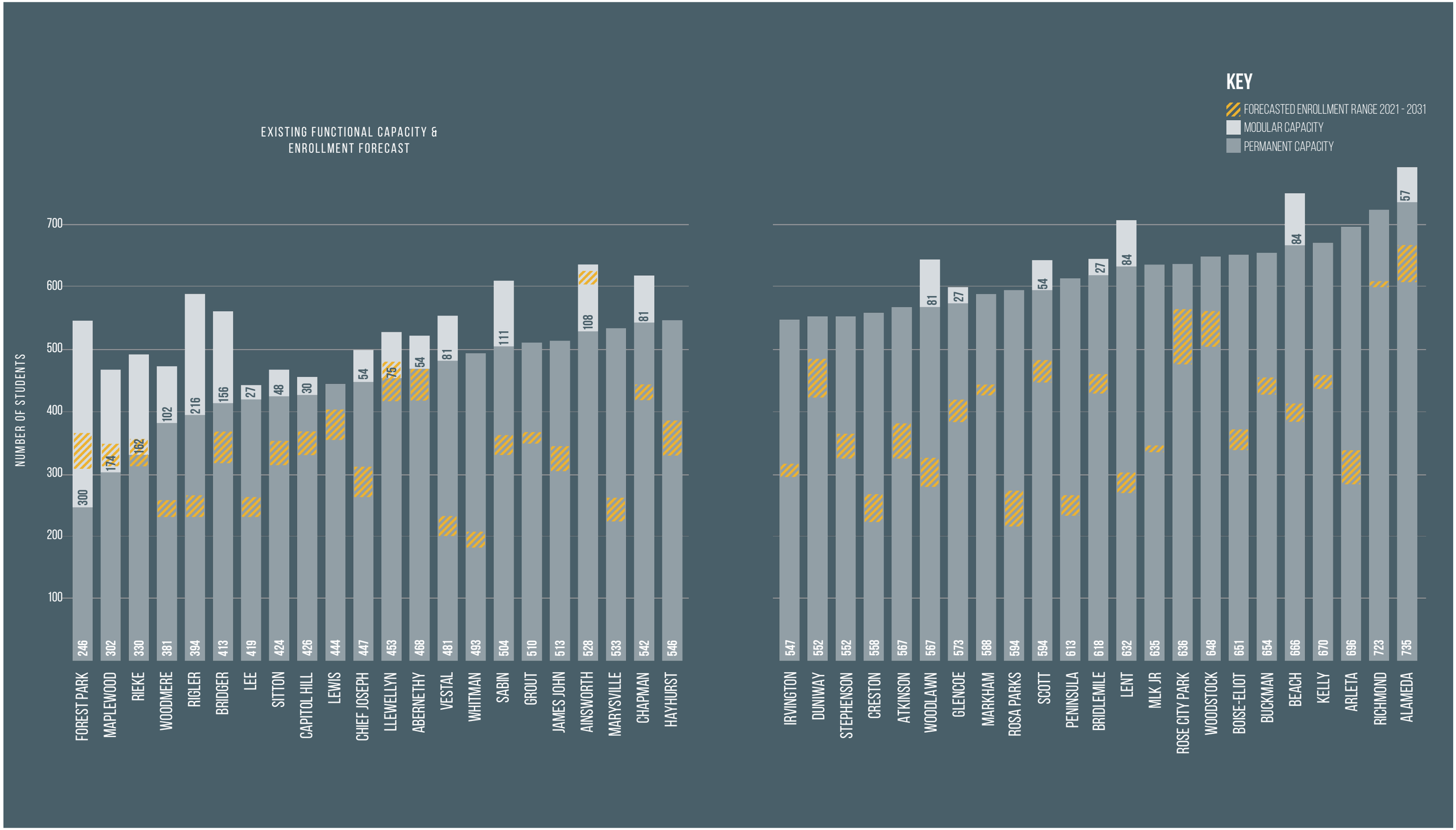
PRIMARY BUILDING AGE IN YEARS



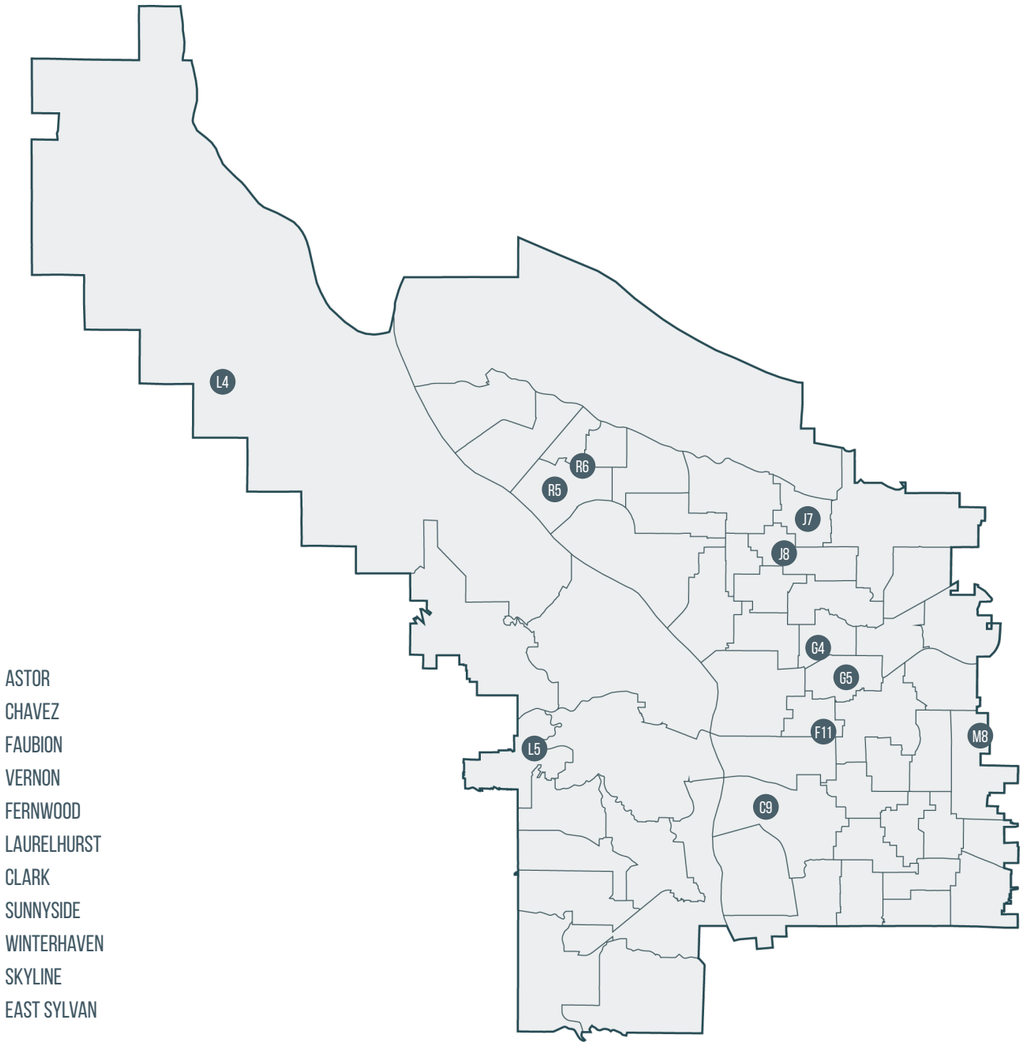
ELEMENTARY SCHOOL PROGRAMS				PROJECTED UTILIZATION				
SITE	CLASSROOMS	MODULAR CLASSROOMS	FUNCTIONAL CAPACITY	2021-22	2022-23	2023-24	2024-25	2025-26
AINSWORTH	23	4	636	99%	98%	97%	98%	97%
RICHMOND	29	0	723	84%	83%	82%	83%	83%
ABERNETHY	21	2	522	90%	89%	87%	83%	81%
LEWIS	19	0	444	90%	88%	86%	84%	81%
LLEWELLYN	20	3	528	93%	92%	88%	84%	81%
ROSE CITY PARK	27	0	636	89%	90%	87%	83%	80%
DUNIWAY	25	0	552	89%	86%	84%	82%	79%
WOODSTOCK	28	0	648	87%	86%	84%	82%	79%
ALAMEDA	31	2	792	84%	81%	80%	78%	77%
CAPITOL HILL	18	1	456	83%	81%	82%	80%	77%
CHAPMAN	24	3	618	70%	70%	73%	74%	74%
MARKHAM	26	0	588	73%	73%	73%	74%	74%
MAPLEWOOD	14	6	467	77%	76%	77%	73%	73%
GROUT	27	0	510	71%	70%	70%	71%	71%
SCOTT	27	2	643	74%	75%	73%	72%	71%
SITTON	22	2	467	76%	77%	76%	73%	71%
BRIDLEMILE	25	1	645	72%	73%	72%	70%	69%
RIEKE	13	6	492	74%	72%	71%	70%	69%
KELLY	37	0	670	68%	69%	69%	68%	66%
BUCKMAN	28	0	654	69%	68%	67%	66%	65%
HAYHURST	22	0	546	72%	69%	68%	66%	64%
GLENCOE	25	1	600	70%	69%	66%	64%	63%
JAMES JOHN	26	0	513	68%	68%	67%	65%	63%
STEPHENSON	20	0	552	66%	67%	68%	65%	63%
ATKINSON	25	0	567	70%	69%	66%	63%	62%
BRIDGER	19	6	561	67%	65%	63%	62%	60%
SABIN	26	4	559	66%	64%	63%	60%	59%
FOREST PARK	11	10	546	68%	63%	63%	60%	58%
CHIEF JOSEPH	17	2	499	64%	63%	61%	59%	56%
BOISE-ELIOT	34	0	651	56%	57%	57%	57%	55%

ELEMENTARY SCHOOL PROGRAMS				PROJECTED UTILIZATION				
SITE	CLASSROOMS	MODULAR CLASSROOMS	FUNCTIONAL CAPACITY	2021-22	2022-23	2023-24	2024-25	2025-26
IRVINGTON	30	0	547	58%	55%	56%	55%	54%
LEE	23	1	443	60%	59%	56%	55%	54%
MLK JR	34	0	635	55%	54%	54%	53%	53%
BEACH	29	3	750	55%	55%	55%	54%	52%
WOODMERE	19	4	473	57%	55%	54%	53%	52%
HOLLYROOD	9	0	228	61%	51%	44%	46%	46%
MARYSVILLE	25	0	533	51%	52%	50%	49%	46%
WOODLAWN	28	3	644	52%	52%	51%	47%	46%
ARLETA	29	0	696	49%	48%	48%	44%	42%
PENINSULA	28	0	613	45%	44%	43%	41%	41%
RIGLER	21	8	589	47%	47%	45%	44%	41%
CRESTON	27	0	558	47%	47%	44%	43%	40%
LENT	28	3	707	43%	41%	40%	39%	39%
ROSA PARKS	26	0	594	46%	44%	43%	40%	38%
WHITMAN	24	0	493	43%	42%	39%	39%	38%
VESTAL	23	3	554	43%	41%	41%	38%	37%

EXISTING FUNCTIONAL CAPACITY & ENROLLMENT FORECAST



K-8 PROGRAMS



- R5 ASTOR
- R6 CHAVEZ
- J7 FAUBION
- J8 VERNON
- G4 FERNWOOD
- G5 LAURELHURST
- M8 CLARK
- F11 SUNNYSIDE
- C9 WINTERHAVEN
- L4 SKYLINE
- L5 EAST SYLVAN

CAPITAL FORECAST

In 2016, the district launched a multi-year process to shift from a K-8 configuration to middle school and K-5 configurations. The shift intended to expand instructional programming options for students in grades 6-8. Eighteen of the twenty-nine total K-8s have been converted as of this writing — mostly to K-5s, including Arleta, Beach, Boise-Eliot, Bridger, Creston, Chief Joseph, Irvington, Lee, Lent, MLK Jr., Peninsula, Sabin, Scott, Woodlawn, and Vestal.

Three former K-8 schools were (or will soon be) converted to middle schools, including Harrison Park (planned, fall 2022), Ockley Green, and Roseway Heights. While the fate of the 11 remaining K-8 schools is yet to be determined, most will likely become elementary schools.

Older K-8 facilities are often poorly-suited for effective middle school instruction. They typically lack the specialized STEAM, performing arts, athletic, and elective spaces required to support the needs and interests of middle-grade students.

The district is currently in Phase II of an enrollment and program balancing process that has already started to identify the K-8 facilities most suitable for middle school conversion (e.g., Harrison Park). There is adequate capacity within existing middle schools to accommodate projected student enrollment for the next 10+ years.

K-8 buildings range in age from 5 to 110 years. The average age is 81 years. Opened in 2016, Faubion is the most recently constructed. Beverly Cleary at Fernwood is the oldest at 110 years. On average, K-8 building conditions are similar to those seen district-wide. The average Facility Condition Index (FCI) score for K-8 buildings is 0.16, identical to the district average. East Sylvan has an FCI score of 0.32, indicating that it is significantly worse than other schools. The facility index score for Winterhaven, Skyline, Vernon, and Creative Science Academy (Clark) are similarly worse than the district average.

ENROLLMENT & UTILIZATION

Based on current configurations and boundaries, enrollment is projected to decline or remain stable at 9 of the 11 K-8 schools over the next five years. Only East Sylvan and Faubion are expected to grow, with respective enrollment increases of 4% and 1% by 2025-26. Additional inferences can be made based on the district's overall K-5 and 6-8 enrollment projections. While the district's K-2 population is expected to increase by five percent (5%) over the next 15 years, enrollment in grades 3-5 is projected to decline by two percent (2%). Enrollment in grades 6-8 is expected to decline most significantly over through 2035-36 by a rate of eight percent (8%).

Current utilization rates across the K-8 schools range from 140% (East Sylvan) to 72% (Astor). Skyline, Winterhaven, and East Sylvan's facilities are significantly smaller than the other K-8 schools in the district, with a functional capacity ranging from 174 to 282. The functional capacity of the district's other K-8 schools ranges from 495 to 710 students.

ACCESSIBILITY

Six (6) K-8 schools have multi-level facilities without elevators, including East Sylvan, Winterhaven, Skyline, Vernon, Sunnyside, and Laurelhurst. Without multi-level access, students with disabilities may not have access to essential programming. Considerations around the future use of these facilities should be evaluated against the district's phasing in ADA Transition Plan.

KEY

Historically Underserved Students

≥ 40%
≥ 20%
≥ 0%
NO DATA

Percent of school population who identifies as: Black or African American, American Indian and Alaska Native, Native Hawaiian and Other Pacific Islander, Some Other Race, Two Or More Races, Hispanic or Latino.

Credit
Department of System Planning And Performance - Portland Public Schools. 2021-2022 SY.

School Population by Free & Reduced Lunch

≥ 40%
≥ 20%
≥ 0%
NO DATA

Percent of school population who are eligible for Free Meals via Direct Certification

Credit
Department of System Planning And Performance - Portland Public Schools. 2021-2022 SY.

Building Accessibility

MULTI LEVEL WITHOUT ELEVATOR

SINGLE LEVEL OR EXISTING ELEVATOR

Note: Few schools in the district's building portfolio meet the guidelines of the American's with Disabilities Act. Elevators are indicated here because of the magnitude of building intervention.

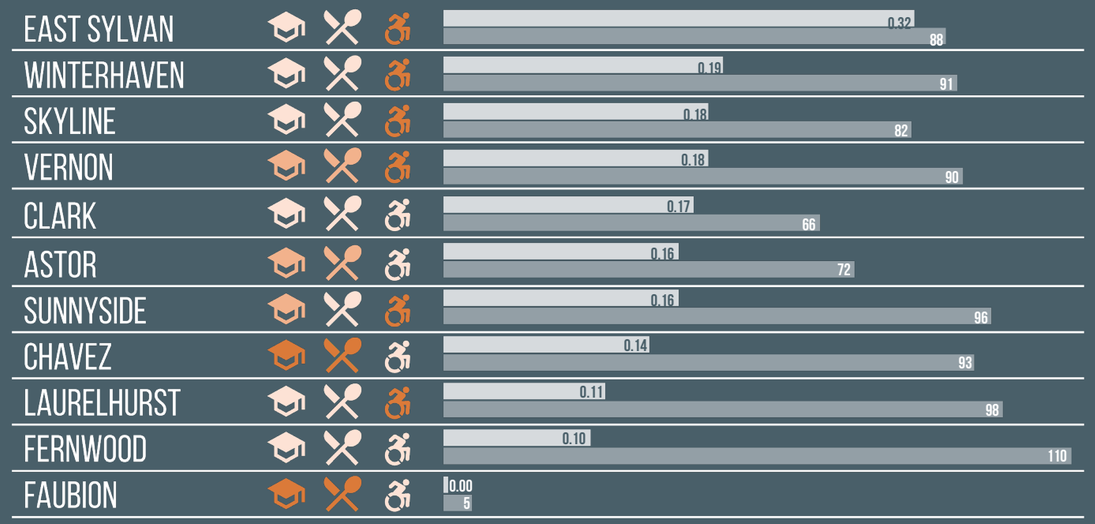
Building Condition

FACILITY CONDITION INDEX

PRIMARY BUILDING AGE IN YEARS

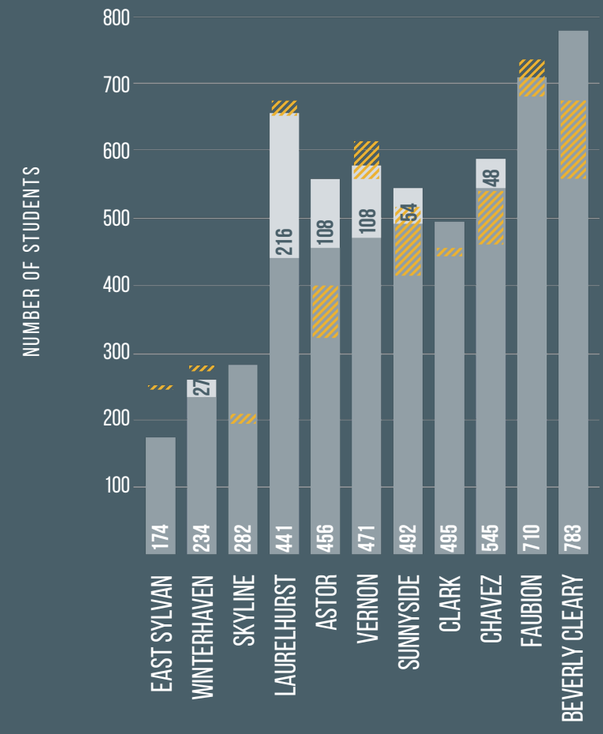
CONFIGURATION MATRIX

SORTED BY DESCENDING FACILITY CONDITION INDEX



K-8 SCHOOL PROGRAMS				PROJECTED UTILIZATION				
SITE	CLASSROOMS	MODULAR CLASSROOMS	FUNCTIONAL CAPACITY	2021-22	2022-23	2023-24	2024-25	2025-26
EAST SYLVAN	10	0	174	140%	143%	143%	143%	144%
WINTERHAVEN	13	1	261	112%	110%	108%	109%	109%
FAUBION	43	0	710	101%	102%	100%	104%	102%
LAURELHURST	22	8	657	106%	103%	105%	104%	101%
VERNON	25	4	579	106%	103%	104%	101%	99%
CLARK	22	0	495	92%	91%	91%	91%	91%
SUNNYSIDE	24	2	546	96%	93%	88%	86%	83%
FERNWOOD	26	0	555	87%	91%	90%	85%	82%
CHAVEZ	29	2	589	92%	89%	86%	83%	82%
SKYLINE	14	0	282	75%	74%	72%	70%	71%
ASTOR	21	4	559	72%	67%	66%	64%	59%

EXISTING FUNCTIONAL CAPACITY & ENROLLMENT FORECAST



KEY

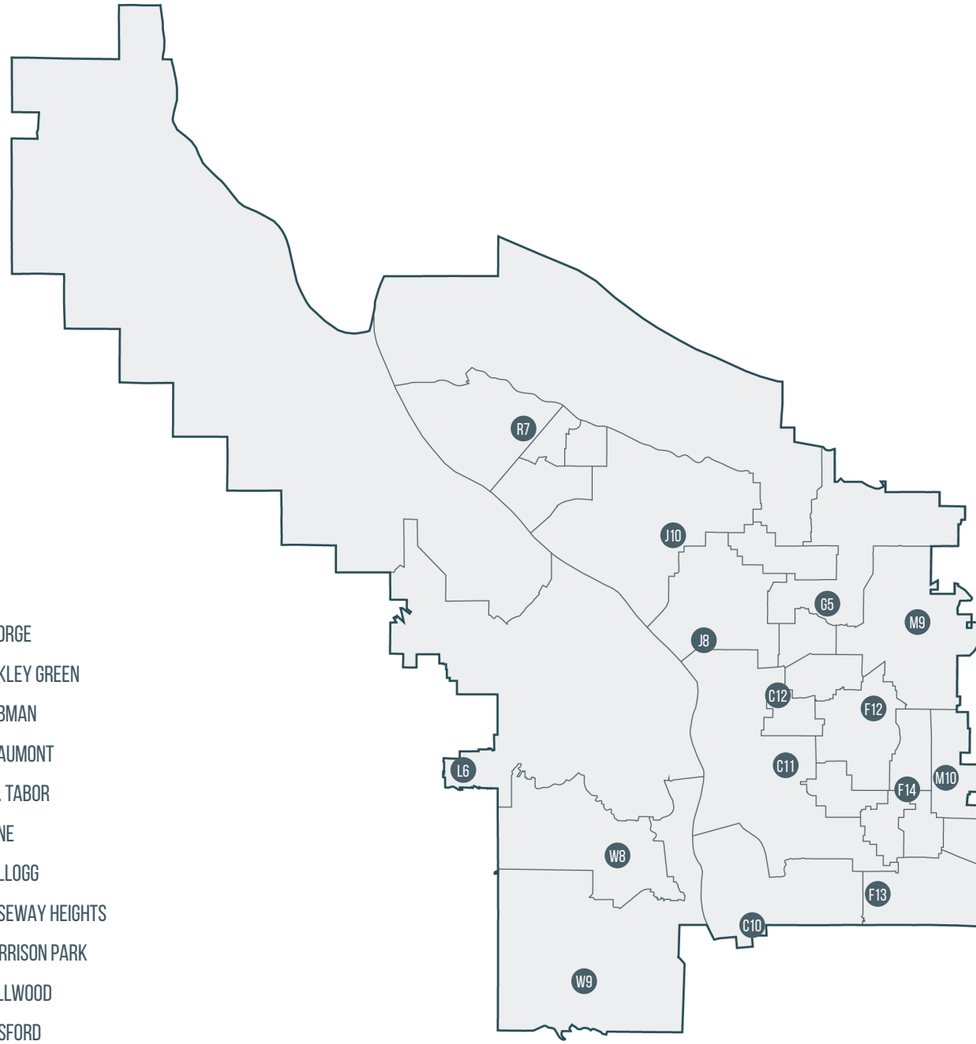
- FORECASTED ENROLLMENT RANGE 2021 - 2031
- MODULAR CAPACITY
- PERMANENT CAPACITY

Notes

» The functional capacity of Beverly Cleary includes both the Hollyrood and Fernwood campuses.

» The functional capacity of Faubion has not been reconciled with the classrooms vacated by Concordia University.

MIDDLE SCHOOLS



- R7 GEORGE
- J10 OCKLEY GREEN
- J8 TUBMAN
- G5 BEAUMONT
- F12 MT. TABOR
- F13 LANE
- F14 KELLOGG
- M9 ROSEWAY HEIGHTS
- M10 HARRISON PARK
- C10 SELLWOOD
- C11 HOSFORD
- C12 DA VINCI
- L6 WEST SYLVAN
- W8 GRAY
- W9 JACKSON

CAPITAL FORECAST

District middle schools range in building age from the newly constructed (Kellogg, 2021) to buildings more than a century old (Sellwood, 1914). The average age of district middle schools is 77 - two years older than the overall district average.

Building conditions are likewise near the district average: 0.13, slightly better than the district average of 0.16. Harrison Park is in the poorest condition. The school is one of seven district buildings in critical condition. Importantly, however, the building is undergoing extensive renovations as of this writing. The work includes a partial reroof and educational suitability improvements in anticipation of the school's transition from a K-8 to a middle school.

From the perspective of educational vision, the district initiated a multi-year Middle School Redesign process in 2020. This initiative will define practices, strategies, and approaches grounded in student experience to inform systems-level decisions around the middle school experience.

These parallel initiatives — this Long-Range Facility Plan and Middle School Redesign — present a unique opportunity to align the district's aging middle schools to support the district's new vision for middle school education.

As a coordinated effort, this will require a thoughtful phasing of projects across multiple bonds to prioritize underserved communities while effectively sequencing projects for the greatest efficiency.

ENROLLMENT & UTILIZATION

Middle school enrollment is expected to decline eight percent (8%) from 2019-20 through 2035-36 — similar to high school enrollment but without a period of over-utilization from 2021 - 2027.

Enrollment forecasts suggest all middle schools will remain within their built capacity throughout the forecasted range. Mt. Tabor and Kellogg, however, are expected to remain above 90%. Careful monitoring of these schools would be prudent, particularly in light of initiatives from Middle School Redesign.

Lane Middle Schools stands out at the lower end of the utilization range: for the 2021-22 school year, Lane is forecast at 53% utilization; over the next 15 years, enrollment is projected to decline 24%.

At the time of this writing, the district is undertaking an enrollment and program balancing effort. This process will explore boundary changes to move Lane (among other schools) toward enrollment solvency.

ACCESSIBILITY

Another important coordination point is with the district's ADA Transition Plan. The transition plan is a schedule of accessibility improvements intended to align district buildings with the Americans with Disabilities Act. The priorities were developed in collaboration with community members and partner organizations during Summer 2020 and divided across four phases.

Each phase identifies specific sites to focus investments, creating a holistic, accessible educational opportunity for our students over time. Phases I and II of the Transition Plan are funded through the 2020 Bond. Phase III includes elevators at middle schools.

Future Bond Planning Committees should make specific recommendations around project timing based on a clearer understanding of the district's bonding capacity, community support, and competing needs.

KEY

Historically Underserved Students

≥ 40%
≥ 20%
≥ 0%
NO DATA

Percent of school population who identifies as: Black or African American, American Indian and Alaska Native, Native Hawaiian and Other Pacific Islander, Some Other Race, Two Or More Races, Hispanic or Latino.

Credit
Department of System Planning And Performance - Portland Public Schools. 2021-2022 SY.

School Population by Free & Reduced Lunch

≥ 40%
≥ 20%
≥ 0%
NO DATA

Percent of school population who are eligible for Free Meals via Direct Certification

Credit
Department of System Planning And Performance - Portland Public Schools. 2021-2022 SY.

Building Accessibility

MULTI LEVEL WITHOUT ELEVATOR

SINGLE LEVEL OR EXISTING ELEVATOR

Note: Few schools in the district's building portfolio meet the guidelines of the American's with Disabilities Act. Elevators are indicated here because of the magnitude of building intervention.

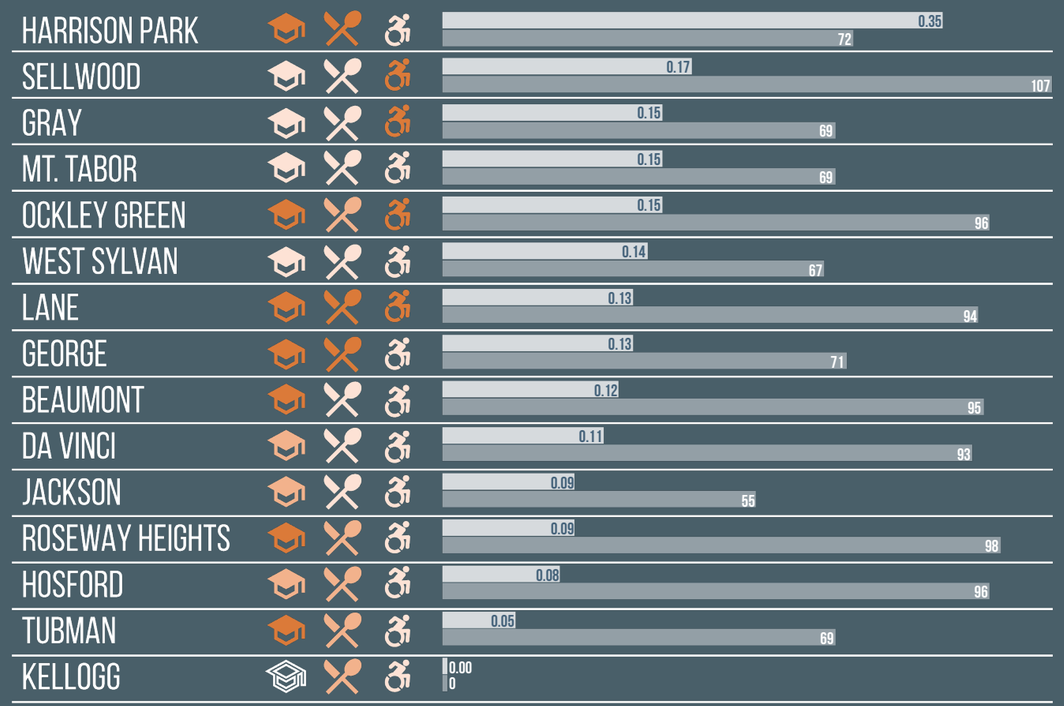
Building Condition

FACILITY CONDITION INDEX

PRIMARY BUILDING AGE IN YEARS

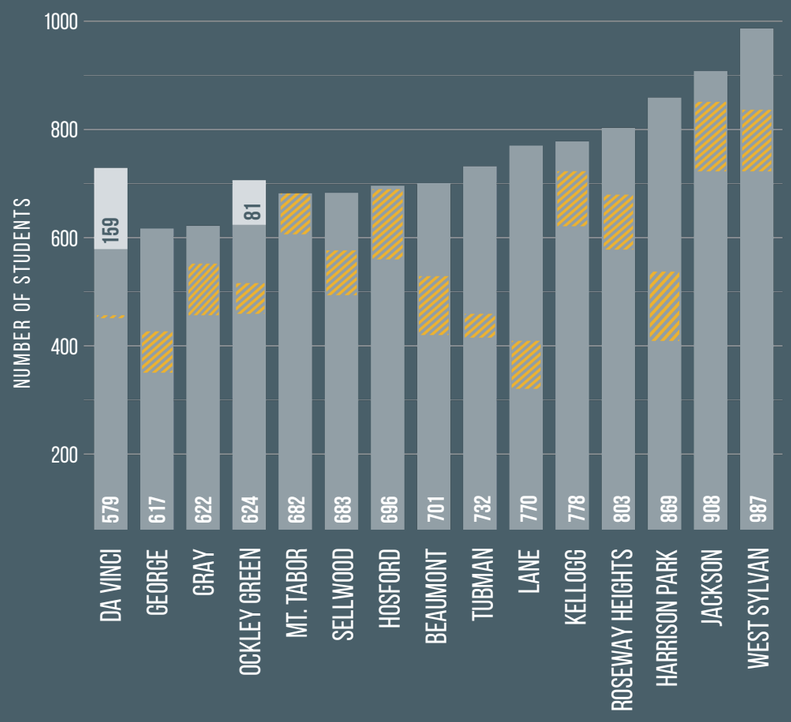
CONFIGURATION MATRIX

SORTED BY DESCENDING FACILITY CONDITION INDEX



MIDDLE SCHOOL PROGRAMS				PROJECTED UTILIZATION				
SITE	CLASSROOMS	MODULAR CLASSROOMS	FUNCTIONAL CAPACITY	2021-22	2022-23	2023-24	2024-25	2025-26
MT. TABOR	31	0	682	101%	98%	99%	98%	97%
KELLOGG	33	0	803	90%	89%	90%	90%	91%
HOSFORD	32	0	696	98%	93%	91%	89%	89%
JACKSON	40	0	908	91%	94%	87%	86%	84%
SELLWOOD	30	0	683	83%	84%	84%	82%	83%
ROSEWAY HEIGHTS	39	0	803	78%	78%	77%	77%	80%
WEST SYLVAN	40	0	987	83%	85%	82%	81%	79%
OCKLEY GREEN	31	3	689	72%	73%	73%	73%	75%
GRAY	26	0	622	88%	89%	85%	78%	75%
BEAUMONT	34	0	701	75%	74%	72%	70%	69%
DA VINCI	25	6	714	63%	64%	64%	64%	64%
TUBMAN	33	0	732	60%	62%	62%	62%	63%
GEORGE	31	0	617	70%	69%	65%	65%	62%
LANE	39	0	770	53%	49%	47%	46%	47%
HARRISON PARK	39	0	1,006	46%	47%	46%	44%	42%

EXISTING FUNCTIONAL CAPACITY & ENROLLMENT FORECAST



KEY

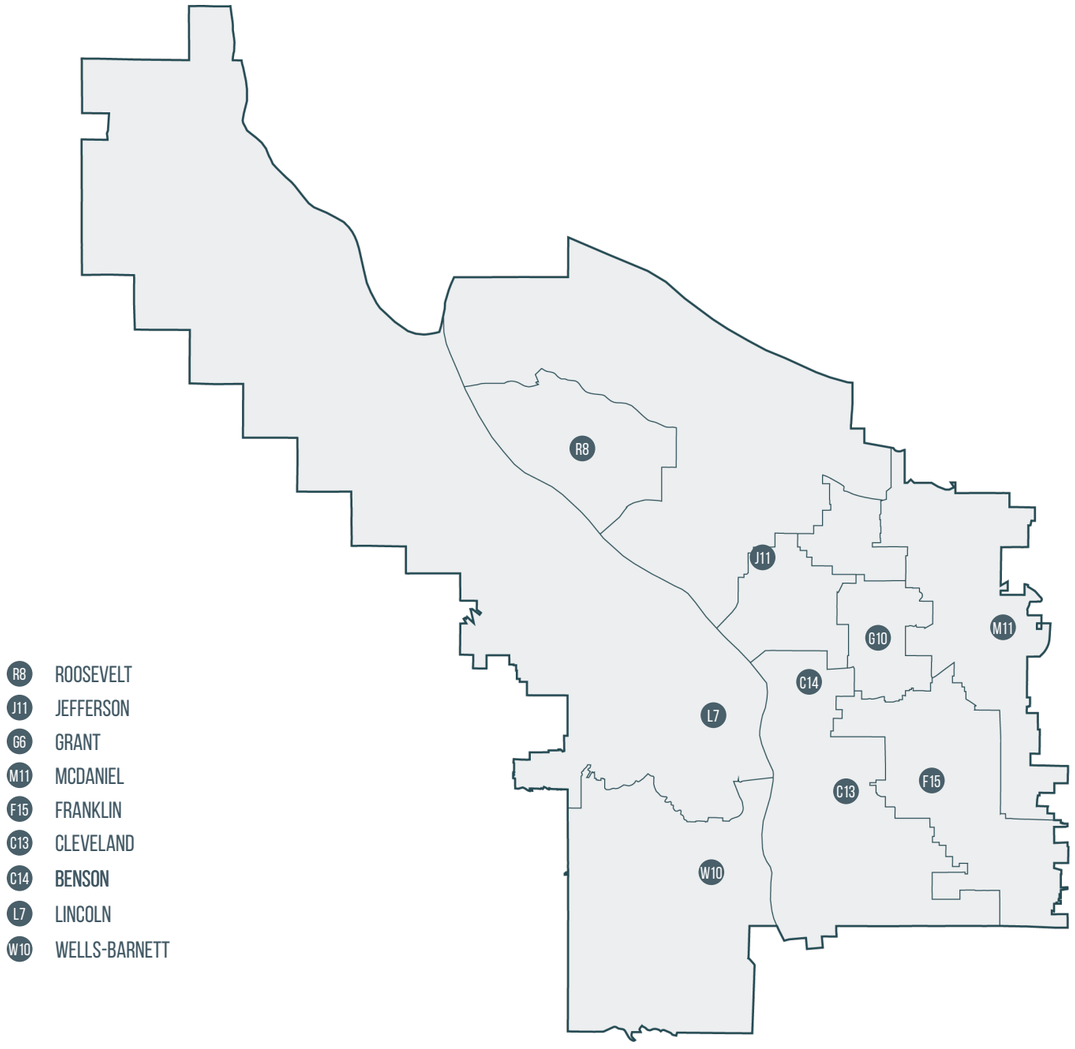
- FORECASTED ENROLLMENT RANGE 2021 - 2031
- MODULAR CAPACITY
- PERMANENT CAPACITY

Notes:

» As of this writing, Harrison Park is a K-8 but anticipated to transition to a middle school for the 2022-23 school year. The forecast numbers are based on a K-8 configuration.

» Modular capacity is represented here as gross rather than functional.

HIGH SCHOOL PROGRAMS



- R8 ROOSEVELT
- J11 JEFFERSON
- G6 GRANT
- M11 MCDANIEL
- F15 FRANKLIN
- C13 CLEVELAND
- C14 BENSON
- L7 LINCOLN
- W10 WELLS-BARNETT

CAPITAL FORECAST

Beginning with the 2012 bond, the district prioritized high schools to be modernized or rebuilt. The 2020 bond includes funds for a new Jefferson High School, and design work for Cleveland and Wells-Barnett high schools, establishing sightlines to fulfill this commitment in the next bond. Once complete, the district will have modernized almost 3 million square feet of instructional space — one-third of the total built area district-wide.

ENROLLMENT & UTILIZATION

Regarding high school enrollment: the 2021-22 school year will be the first year subsequent to the COVID-19 pandemic when a nascent high school enrollment bubble will exceed the built capacity of many of our high schools. See the following page for specific site enrollment forecasts.

The enrollment bubble will not be uniform across schools, nor will it reach all schools simultaneously. Franklin needs two additional classrooms as of this writing, and the school's enrollment is expected to rise, although modestly, through 2025. Likewise, Grant and Roosevelt's student enrollment will exceed their respective built capacities in 2021-22 and remain above their built capacity through at least 2025-26.

While the enrollment forecast for Wells is not expected to exceed building capacity, it will be very close: for the 2025-26 school year, the anticipated enrollment will be within 25 students of the building's functional capacity. Such a small margin between enrollment and building capacity may be prohibitive to the intended operation of the building. Factors such as the anticipated programming, the specific academic supports offered, and the suitability of specific classrooms may render the building overcapacity.

In addition to a 10-year enrollment forecast for individual schools, the PSU Population Research Center provides a 15-year forecast for configurations. High school enrollment is forecast to decline twelve percent (12%) from 2021-22 through the end of the forecast range in 2035-36. The 10-year individual school forecast hints at this trend following the 2025-26 school year. Franklin and Grant, for example, forecast enrollment drops by two percent (2%) each year 2025 - 2031.

The data, therefore, suggest this period of overcrowding will last 5-7 years from approximately 2021 - 2026. For this reason, non-capital solutions should be pursued where possible.

ACCESSIBILITY

District high schools will be fully accessible through the modernization process.

KEY

Historically Underserved Students

≥ 40%
≥ 20%
≥ 0%
NO DATA

Percent of school population who identifies as: Black or African American, American Indian and Alaska Native, Native Hawaiian and Other Pacific Islander, Some Other Race, Two Or More Races, Hispanic or Latino.

Credit
Department of System Planning And Performance - Portland Public Schools. 2021-2022 SY.

School Population by Free & Reduced Lunch

≥ 40%
≥ 20%
≥ 0%
NO DATA

Percent of school population who are eligible for Free Meals via Direct Certification

Credit
Department of System Planning And Performance - Portland Public Schools. 2021-2022 SY.

Building Accessibility

MULTI LEVEL WITHOUT ELEVATOR

SINGLE LEVEL OR FULLY ACCESSIBLE

Note: Few schools in the district's building portfolio meet the guidelines of the American's with Disabilities Act. Elevators are indicated here because of the magnitude of building intervention.

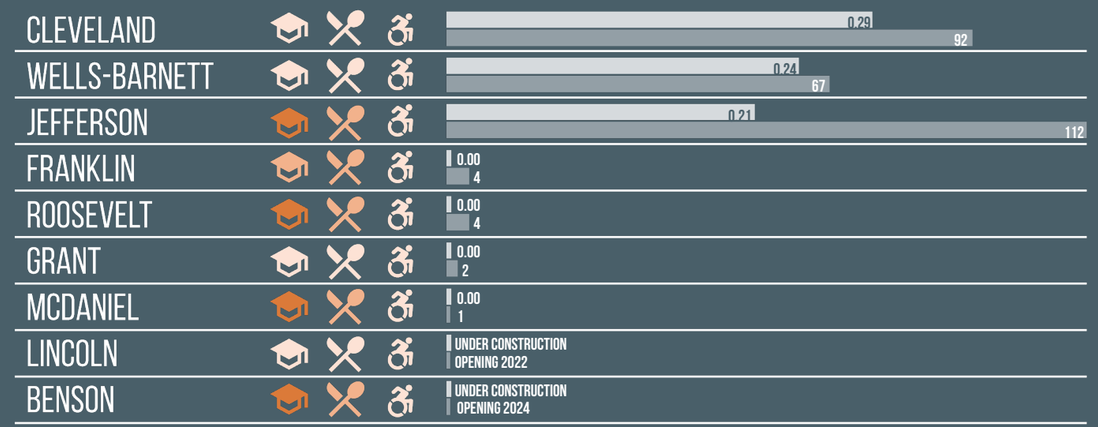
Building Condition

FACILITY CONDITION INDEX

PRIMARY BUILDING AGE IN YEARS

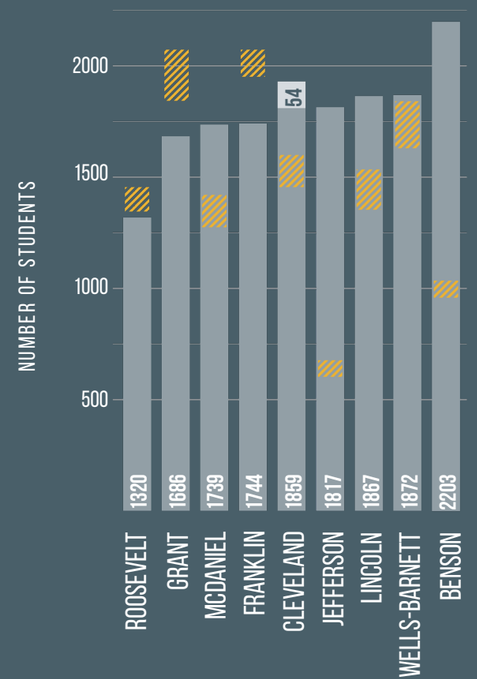
CONFIGURATION MATRIX

SORTED BY DESCENDING FACILITY CONDITION INDEX



HIGH SCHOOL PROGRAMS				PROJECTED UTILIZATION				
SITE	CLASSROOMS	MODULAR CLASSROOMS	FUNCTIONAL CAPACITY	2021-22	2022-23	2023-24	2024-25	2025-26
GRANT	74	0	1,686	122%	124%	122%	121%	118%
FRANKLIN	74	0	1,744	118%	120%	118%	119%	116%
ROOSEVELT	61	0	1,320	103%	109%	107%	107%	108%
WELLS-BARNETT	76	0	1,872	88%	90%	95%	98%	99%
CLEVELAND	75	2	1,859	86%	84%	85%	86%	85%
LINCOLN	76	0	1,867	81%	80%	84%	82%	81%
MCDANIEL	77	0	1,739	74%	75%	80%	81%	77%
BENSON	86	0	2,203	44%	44%	44%	47%	48%
JEFFERSON	74	0	1,817	34%	34%	35%	36%	35%

EXISTING FUNCTIONAL CAPACITY & ENROLLMENT FORECAST



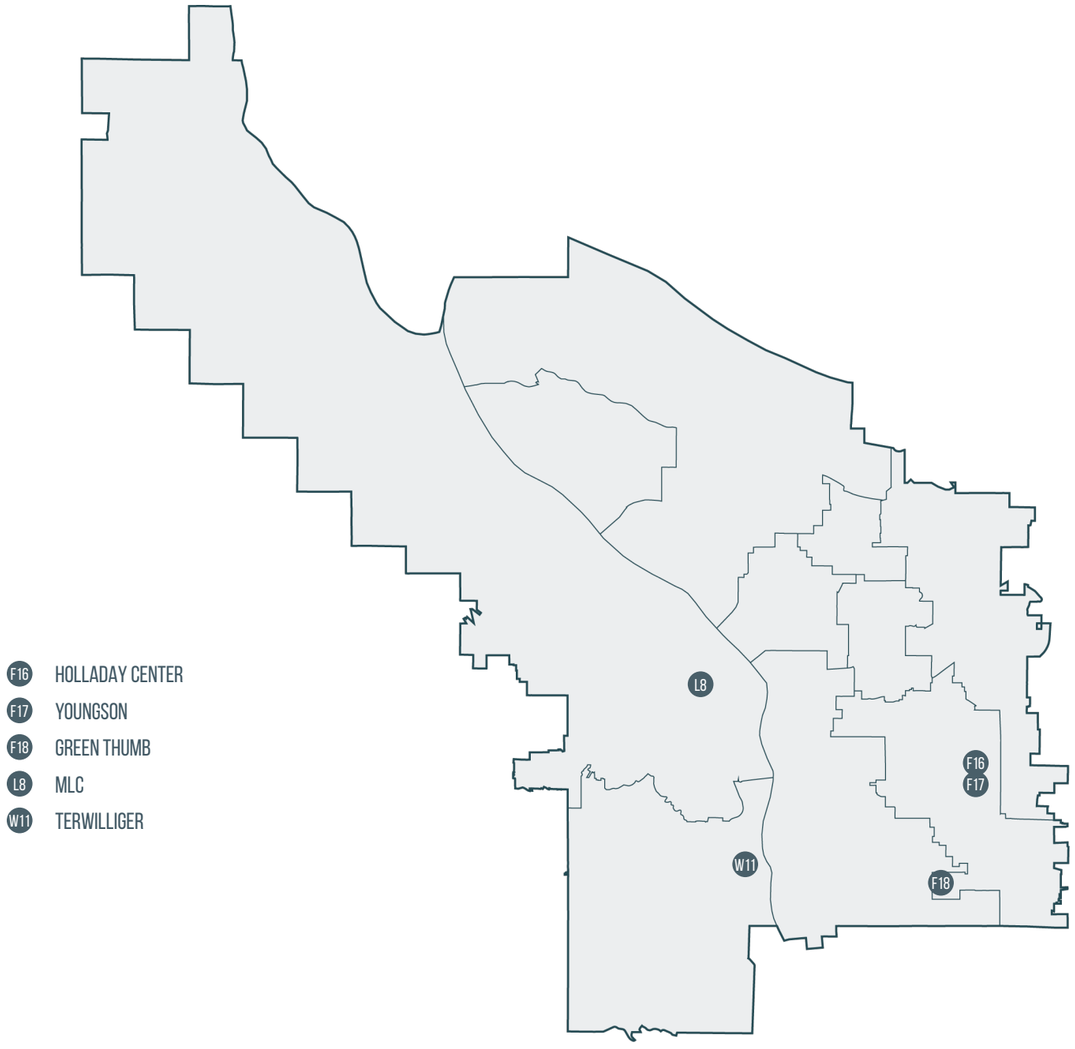
KEY

- FORECASTED ENROLLMENT RANGE 2021 - 2031
- MODULAR CAPACITY
- PERMANENT CAPACITY

Notes:

- The functional capacity for Lincoln is based on design drawings for the building opening in 2022
- The functional capacity for McDaniel is based on the modernized building
- The functional capacity of Roosevelt does not include the phase IV additions

ALTERNATIVE SCHOOLS



- F16 HOLLADAY CENTER
- F17 YOUNGSON
- F18 GREEN THUMB
- L8 MLC
- W11 TERWILLIGER

CAPITAL FORECAST

Alternative schools include a wide range of buildings and programs. Metropolitan Learning Center (MLC), Holiday Center, Youngson, Green Thumb, and Terwilliger support students outside typical graduation patterns. The necessary student supports for each program differs widely. System-level statements are not included in this summary. In most cases, the comment element to these buildings and programs is their uniqueness. Please see the individual site summaries for details on each site.

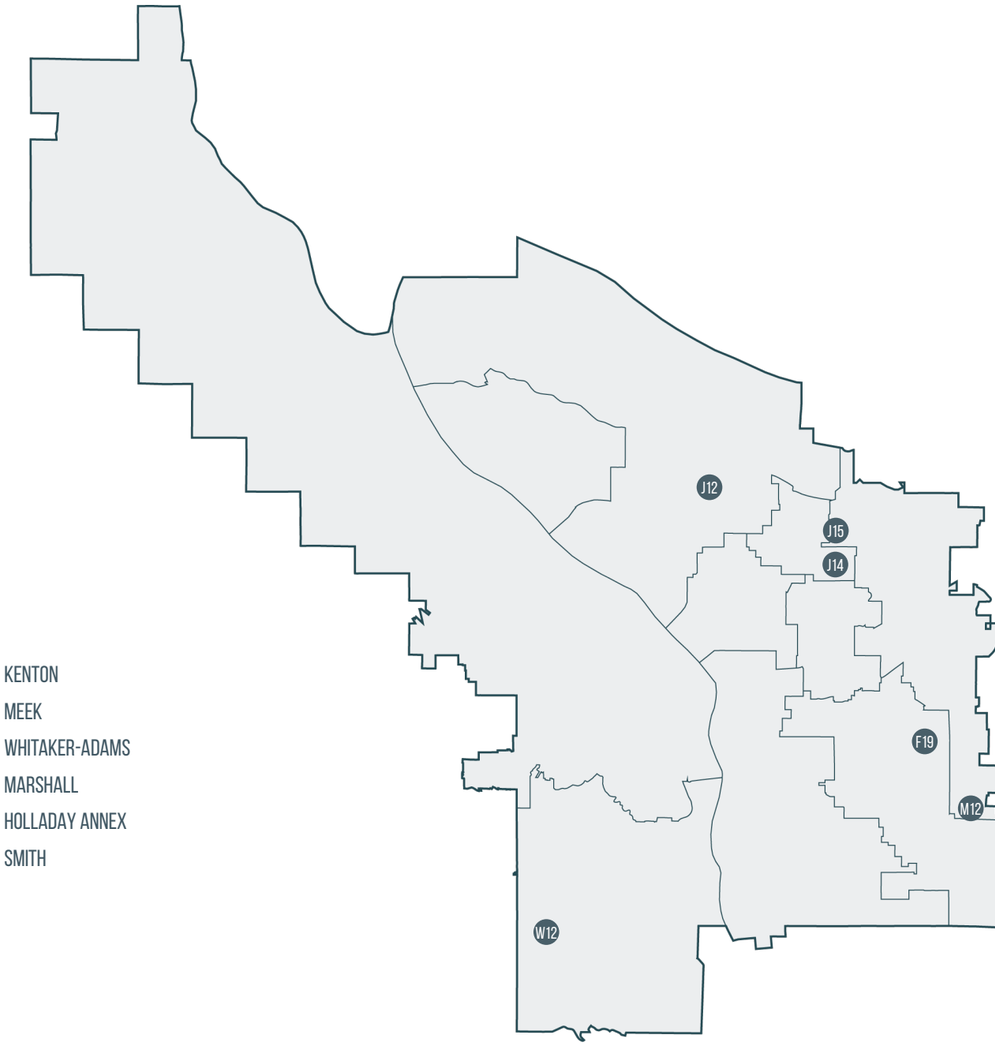
ENROLLMENT & UTILIZATION

Enrollment forecasts provided by Portland State University's Population Research Center do not include most sites discussed here. Projections, where they are available, are documented in the individual site summaries.

ACCESSIBILITY

Green Thumb stands out for unique consideration for accessibility improvements. Work in the 2020 Bond will align the site with the American's with Disabilities Act accessibility guidelines; accessibility improvements beyond these guidelines would be prudent. Green Thumb currently supports the Community Transition Program; students in this program have a range of accessibility needs above the American's with Disabilities Act Guidelines. Power-assist doors are one example. Many students in the Community Transition Program do not have the gross motor ability to independently open doors and rely on staff support to enter and exit their classrooms.

SWING & VACANT SITES



- J12 KENTON
- J14 MEEK
- J15 WHITAKER-ADAMS
- M12 MARSHALL
- F19 HOLLADAY ANNEX
- W12 SMITH

CAPITAL FORECAST

Kenton and Marshall serve as the district's swing sites. Marshall is a former high school and comfortably supports a high school student body. Kenton is closer in square footage and classroom count to an elementary school. Both sites currently support the programs to be sited on the Benson campus in 2024.

The district owns two vacant sites: Smith and Whitaker-Adams. Smith is a former elementary school, closed in 2005. The building is now derelict. Significant investments would be necessary before the structure could be operational. However, enrollment forecasts in the Southwest do not support reopening Smith.

District leadership identified Whitaker-Adams for future development as an athletics hub as part of the development of this plan.

OPERATIONAL RECOMMENDATIONS

Effective operations and maintenance of school facilities contribute to the longevity of systems and foster healthy indoor environmental conditions for students and staff. The district is committed to prioritizing energy-efficient designs in its capital projects, supporting our sustainability goals and Climate Action Policy.

Initial construction costs account for only 20% of total expenditures over a building's lifespan; operations, maintenance, and decommissioning account for the remaining 80%. The district must invest in energy-efficient, durable systems for long-term operational savings.

Like most large, urban districts with a substantial inventory of aging buildings, the district has a considerable maintenance backlog that far exceeds what could be addressed or funded over a single bond cycle. Educational suitability deficiencies further limit schools' ability to meet programmatic and instructional standards.

The district is faced with the inevitable challenge of prioritizing and scheduling a vast array of projects across district buildings over multiple bond cycles — in some cases necessitating short-term fixes until a building can be fully modernized.

EFFICIENT USE OF SITES

Most district sites do not have enough land area to meet program goals. Typical constraints include:

» Lack of space for sufficient outdoor physical education and athletic amenities such as outdoor courts, fields, and covered play structures.
» Inadequate parking and vehicle drop-off lanes for buses and parents, resulting in traffic bottlenecks and vehicle/pedestrian conflicts.
» Lack of "buffer" space between school facility entrances and adjacent arterial roads creates unsafe walkers.
» Insufficient land to accommodate a building expansion

One approach to increasing the efficient use of school sites is to develop "Hubs" as a shared resource for space-intensive programs. This approach was elevated across the Program Vision section of this document.

Hubs can provide intentionally designed spaces and facilities used by multiple schools within a region. Athletics, performing arts, and career technical education are programs well-situated for a hub model. To be sure, there may be other programs, but these have unique space and equipment requirements and are frequently underserved by district sites.

ALTERNATIVES TO NEW CONSTRUCTION

As the district proceeds with its phased approach to addressing facilities deficiencies through modernization or replacement of aging structures, the district may consider implementing one or more non-construction alternatives for addressing capacity and educational adequacy deficiencies:

Enrollment and Program Balancing through School Boundary Adjustments

The district has sufficient building capacity to meet current and forecasted student populations. However, enrollment is not evenly distributed: some schools show signs of overcrowding; others are vastly underutilized. Portland Public Schools recently launched a multi-phase process to balance student enrollment and programs across the district. The final recommendations will be developed and implemented over several years.

Reactivate Swing Sites as School Buildings

The district owns two sites no longer operated as school buildings: Kenton and Marshall. Both serve as swing sites for buildings undergoing modernization. If enrollment diverges from the forecasted numbers, one or more of these facilities could be reactivated as school buildings.

Expand the Virtual Scholars Program

The continued expansion of virtual learning may lead to a greater sense of fluidity in how, where, and when instruction occurs. A component of the program forecast for Multiple Pathways to Graduation (MPG) is the expansion of the Virtual Scholars program in the short term, followed by the eventual creation of a Virtual Scholars School. The COVID-19 pandemic catalyzed the expansion of comprehensive distance learning (CDL) programs. These asynchronous learning models particularly benefited BIPOC and underserved students who often balance work and family responsibilities.

Although the Virtual Scholars program was created eight (8) years ago, funding and staffing dramatically increased due post-COVID. The district recognizes that virtual learning will continue to play an essential role in meeting the varied educational needs of students.

Implement Program Hubs

As described above, hub facilities for programs such as athletics, performing arts and CTE would provide centralized, shared access to programs and opportunities while minimizing the need to construct large, expensive expansions or renovations at multiple sites, many of which have insurmountable site constraints.

Mobile Makerspace / STEAM Lab (e.g., "STEAM Bus")

Some school districts have developed "mobile maker spaces" to serve schools that lack specialized in-house spaces for STEAM activities. Although a mobile makerspace lacks many advantages of a dedicated makerspace, such an approach can serve as a non-construction alternative to providing students with opportunities for hands-on, project-based learning. As such, it may serve as an interim approach for expanding STEAM offerings at non-modernized schools.

Classroom Utilization Analysis for Improved Efficiency at Select Sites

The district's aging school buildings were not designed to support the wide array of programs, functions, services, and community partners that they house today. Many schools within the district have multiple full-sized classrooms that are not used as teaching stations but instead support other functions (e.g., community partners, administrative offices, etc.). A classroom utilization analysis would allow the district to study the optimal placement of non-instructional services and programs, both in terms of access and spatial efficiency. This can be a helpful exercise if increased capacity is required due to enrollment increases or if the school would like to find space for a new program or service (e.g., pre-k, etc.).

PORTLAND PUBLIC SCHOOLS

STAFF REPORT

Date: November 22, 2021

To: Portland Public Schools, Board of Education

From: Dan Jung, Chief Operating Officer
Dana White, Director of Planning & Real Estate Management

Subject: Long-Range Facility Plan

BACKGROUND

All large school districts in Oregon are required to complete a Long-Range Facility Plan every ten years. The purpose of the document is to plan for future capital improvements within the context of current educational vision and student enrollment trends over the next 10 to 15 years. The plan provides a strategic framework to be tested against community voice and vision prior to future bond campaigns.

This plan synthesizes three primary considerations: educational program vision, enrollment and capacity, and facility condition. These considerations are guided by a strategic vision established by the district and informed by input from the broader district community.

The plan also addresses the requirements of OAR 581-027-0040, Long-Range Facility Plan Requirements, and Section 5 of ORS 195.110, School Facility Plan for Large School Districts. In doing so, this plan creates a framework for future bond-planning efforts, reflects community values, and targets alignment with community capital support.

RELATED POLICIES/BEST PRACTICES

This document falls within a sequence of steps recommended by the state before capital Bond planning. Many steps remain before a capital measure can be referred to the voters. Importantly, this document does not make commitments that will require future Board action or make specific recommendations for future Bonds. Instead, the Long-Range Facility Plan is intended to serve as a framework for future Bond development.

By accepting this document, the Board establishes a common starting point for future capital planning discussions.

ANALYSIS OF SITUATION

By accepting this document, the Board is not committed to any of the recommendations therein. Instead, the document is intended to provide information on building condition, enrollment forecasts, and educational vision to serve future Bond planning efforts.

This Long-Range Facility Plan is a living document. Staff will update it annually or as needed based on current enrollment forecasts and facility condition data.

Enrollment forecasts, in particular, will need careful attention moving forward. This Long-Range Facility Plan presents the forecasted enrollment for the 2021-22 school year, not the actual enrollment. The ongoing COVID-19 pandemic continues to obstruct predicable enrollment patterns. Further input from PSU's Population Research Center is necessary prior to further statements regarding enrollment forecasts.

FISCAL IMPACT

There are no immediate fiscal impacts to accepting the Long-Range Facility Plan. The document does not commit the Board to any of the identified capital improvements.

COMMUNITY ENGAGEMENT (IF APPLICABLE)

Community voice was central throughout the plan development process, and continued dialogue with community members will be essential to the success of this plan. The outcomes of this document should be tested and refined with community input prior to future bond development.

Please see the Executive Summary of the Long-Range Facility Plan for complete details on the engagement efforts for this document.

TIMELINE FOR IMPLEMENTATION / EVALUATION

The plan forecasts the District's capital needs in the mid-to-long term. There is no discussion of current or ongoing projects and likewise no discussion of the projects within the 2020 Bond. The Long-Range Facility Plan will be updated prior to planning efforts for the 2024 Bond.

BOARD OPTIONS

1. Accept the Long-Range Facility Plan.
2. Revise the Long-Range Facility Plan with Board recommendations.

CONNECTION TO BOARD GOALS

The Long-Range Facility Plan is grounded in, and an extension of the District's Racial Equity and Social Justice (RESJ) goals. Please see the section, Planning Principles, for a discussion of how the RESJ goals informed the development process.

STAFF RECOMMENDATION

Staff recommends accepting the Long-Range Facility Plan.

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

_____*CP*___ *(Initials)*

ATTACHMENTS

A. Long-Range Facility Plan: Volume 1, System Overview
B. Long-Range Facility Plan: Volume 2, Site Summaries

2021

LONG-RANGE FACILITY PLAN

VOLUME 2: SITE SUMMARIES

PORTLAND PUBLIC SCHOOLS

2021 11 22 - BOE REVIEW DRAFT

This plan addresses the provisions of OAR 581-027-0040, Long-Range Facility Plan Requirements, and Section 5 of ORS 195.110, School Facility Plan for Large School Districts.

BRIC ARCHITECTURE

PPS

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PRE-K SCHOOLS

APPLEGATE EARLY LEARNING CENTER

ADDRESS
7650 N COMMERCIAL AVE

CONSTRUCTION DATE
1954 (PRIMARY)

LEVELS
1

BLDG AREA
27,785 SF

SITE AREA
59,677 SF
1.37 ACRES

CLASSROOMS COUNT
13

FUNCTIONAL CAPACITY
192 STUDENTS

CLUSTER
JEFFERSON

MODULAR CLASSROOMS
1

ZONING
RESIDENTIAL 5,000 CU
RESIDENTIAL 2,000 CU

HISTORIC SUMMARY

Applegate Early Learning Center is located in the Piedmont Neighborhood of North Portland. The campus is situated at the south end of Farragut Park. In addition to the primary classroom building, the campus includes a portable classroom building located at the west portion of the property.

The main school building has a rectangular massing with a wood frame that rests on a poured concrete foundation. Designed in the Northwest Regional style, the building features a moderately pitched gable roof and overhanging eaves. Vinyl siding covers the single story building. Fenestration consists primarily of wood frame windows.

Development in the neighborhood consists of a mixture of single family houses, multi-family residences, and mid-size commercial and industrial buildings. In addition to the primary classroom building, the campus includes a portable located at the west portion of the property.

The school is not eligible for the NRHP under Criterion A.

FACILITY CONDITION SUMMARY

The Applegate Early Learning Center facility is 67 years old, and in poor condition with a facility condition index (FCI) score of 0.14

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the plumbing fixtures had exceeded their typical design lives. The domestic water distribution equipment was recently replaced.
- The vast majority of the steam heating equipment, exhaust fans, air handling units, fan coil units, controls and associated equipment had exceeded their design lives.

Fire Protection

- The building did not have a fire suppression system.
- An addressable fire alarm system headend (Potter PFC-6800) and associated detection and signal devices were installed in 2019.

Electrical

- The building's main electrical switchboard was replaced in 1996; however, four panel boards had exceeded their typical design lives. One panel board (IT1) had been added as part of a telecommunications upgrade in 1996.

Arch/Struct/Site

- The exterior windows of the main building had heavily weathered wood frames and the paint finish was peeling.
- The roof hatch on the main building had weak springs and damaged latch hardware.
- The carpet floor finish in the main building had excessive wear and staining in traffic areas.
- The painted concrete floor finish in the main building had excessive wear and chipping throughout.
- The concrete pedestrian paving at the main building's entrance had moderate cracking and settlement that had caused uneven surfaces.
- The chain link perimeter site fencing had moderately rusted frames and chain link fabric.
- Head Start classrooms are former elementary general classrooms. Classrooms are undersized for early learning (75% of size standard).
- Fencing is minimal. The administrative area is near the entrance but does not have visual access or control of the main entry. There is no entry vestibule or buzzer system.

EDUCATIONAL PROGRAM FORECAST

- Facilities upgrades to pre-k classrooms to support the needs of early learners, including improvements to the Native culture classroom.

RECENT CAPITAL EXPENDITURES

- Water Heater Replacement in 2018

EDUCATIONAL SUITABILITY

CLARENDON EARLY LEARNING CENTER

ADDRESS
9325 N VAN HOUTEN AVE

CONSTRUCTION DATE
1970 (PRIMARY)

LEVELS
1

BLDG AREA
40,723 SF

SITE AREA
185,566 SF
4.26 ACRES

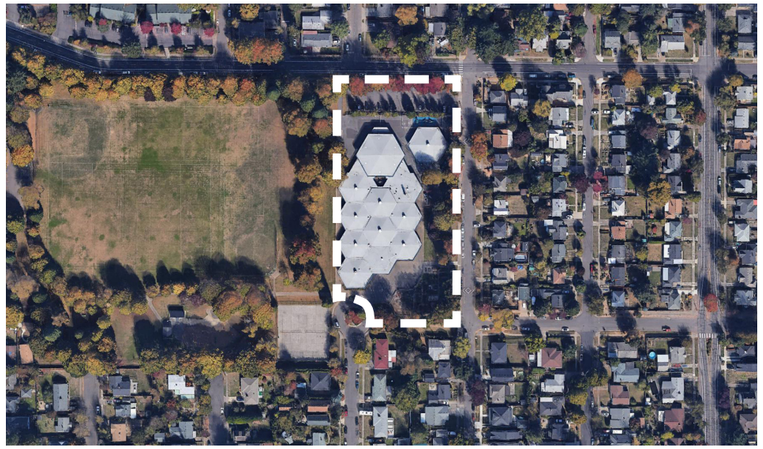
CLASSROOMS COUNT
15

FUNCTIONAL CAPACITY
165 STUDENTS

CLUSTER
ROOSEVELT

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU



HISTORICAL SUMMARY

The Clarendon school campus consists of the 1970-1971 main classroom building and a 1970-1971 play shed. The main classroom building is a single story poured concrete structure comprised of a series of interconnected hexagons. The primary cladding is red brick and horizontal tongue-and-groove siding. Each hexagonal building unit features a modestly pitched hexagonal roof capped by a hexagonal-shaped cupola glazed with multi-colored glass. The expressive use of poured concrete on the interior as the primary structure with little emphasis on hierarchical ornamentation is illustrative of the Brutalist style.

Clarendon is situated in the Portsmouth neighborhood of Portland, Oregon. The neighborhood largely consists of residences constructed 1940-1970. Adjacent to residences to the north, east, and south, the parcel is also adjoined by the broad open play fields of Northgate Park to the west.

Given the uniqueness of both the design and planning process used to arrive at the design choice, the Clarendon School is eligible for the National Register of Historic Places under Criteria A and C.

FACILITY CONDITION SUMMARY

The Clarendon Early Learning Center facility is 51 years old, and in fair condition with a facility condition index (FCI) score of 0.07.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The majority of the plumbing fixtures had exceeded their design lives.
» The domestic water distribution equipment was recently replaced and was in good condition.
» The vast majority of the heating equipment, air handlers, exhaust fans, and associated equipment had exceeded their design lives.

Fire Protection

» Piping was estimated to be original to the building and had exceeded its intended useful design life.
» An addressable fire alarm system headend (Silent Knight 5820XL) and associated detection and signal devices were installed in 2014.

Electrical

» The site's electrical distribution system (including main switchboard and panel boards) had exceeded its intended design life; however, three 208Y/120V panel boards had been replaced more recently.

Arch/Struct/Site

» The slab on grade had moderate linear cracking.
» The roof hatch had weak springs, missing seals, and aged and corroded hardware.
» The carpeting and lockers were approaching the end of typical design life.

RECENT CAPITAL EXPENDITURES

» HVAC Upgrades in 2018
» Parking Restriping in 2019
» Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

» The renovated former "open concept" school provides spaces that support a variety of teaching and learning styles. All instructional spaces include restrooms.
» Doors except for the main entrance are secured. The main entrance is near the office/reception area allowing for visual access; however, there is not an entry vestibule or buzzer system.

EDUCATIONAL PROGRAM FORECAST

» Facilities upgrades to pre-k classrooms to support the needs of early learners.

SACAJAWEA EARLY LEARNING CENTER

ADDRESS
4800 NE 74TH AVE

CONSTRUCTION DATE
1952 (PRIMARY)

LEVELS
1

BLDG AREA
18,862 SF

SITE AREA
152,242 SF
3.5 ACRES

CLASSROOMS COUNT
11

FUNCTIONAL CAPACITY
108 STUDENTS

CLUSTER
MCDANIEL

MODULAR CLASSROOMS
0

ZONING
R7 RESIDENTIAL 7,000 CU

HISTORICAL SUMMARY

The Sacajawea Head Start facility is located in a primarily residential neighborhood in Northeast Portland. Built in 1953, the International style school building (386A) is situated on a grass and asphalt-covered campus. The wood frame building sits on a poured concrete foundation. The main mass of the building is covered by a flat roof. The projecting wings on the east and west sides of the building are covered with shed roofs. Cladding consists of a mixture of red brick and vertical board and batten siding. The modified rectangular shape plan houses classrooms, a play room/cafeteria, a kitchen, and an administrative office.

The principal entry to the school is from the south on NE 74th Avenue. The playground and playfields are located directly to the north and the east of the school. The parking area is located directly to the north of the building.

A good example of the mid-century school design that retains its integrity with its floor plan, interior finishes, fenestration, and cladding intact. The original Sacajawea Elementary School was built in response to the residential development in southwest Portland during the PPS program of post-war construction and is eligible for the National Register of Historic Places (NRHP) under Criterion A.

FACILITY CONDITION SUMMARY

The Sacajawea Early Learning Center facility is 69 years old, and in fair condition with a facility condition index (FCI) score of 0.1.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- Plumbing fixtures were aged but operational. The majority of the water closet flush valves had been updated with dual-flush handles.
- The 200-MBH gas water heater was replaced in 2010 and had no major deficiencies. The boiler appeared to be original to the facilities construction; however, the burner assembly was retrofitted to gas in 1997.
- There were two air handling units located in the mechanical room (Room 114). Both air handlers had exceeded their typical design lives. Additional heat was provided by fin tub radiators, which were located throughout the facility.

Fire Protection

- The fire alarm control panel and fire alarm devices had been recently replaced and had no major deficiencies observed or reported.
- No fire suppression systems were observed during the assessment.

Electrical

- The main switchboard at this facility was replaced in 1996 along with several distribution panels. The remaining electrical distribution panels were original to building construction in 1953 and had exceeded their typical design life.
- The majority of the exterior lighting had recently been upgraded to LED with the exception of four fixtures that appeared to have been installed in 1996 with the other electrical upgrades. The interior lighting was predominantly T8 fluorescent fixtures, which also appeared to have been installed in 1996.

Arch/Struct/Site

- The carpeted areas were rippled in classrooms. A section of vinyl composition tile at the east end of the east-west main hallway, (near the main office) was cracked and deteriorated.
- Staff indicated there was an ongoing leak from a former repair to water piping in the Mechanical Room restroom.
- The exterior wood windows were aged.
- The roof was inaccessible; however, there were stains to the interior ceiling tile in Room 100. No other signs of water intrusion were observed.

RECENT CAPITAL EXPENDITURES

- Playground/fencing improvements in 2017
- Select flooring replacements in 2018

EDUCATIONAL SUITABILITY

- There are very limited spaces to support differentiated learning or flexible groupings. Several vacant rooms provide some flexibility.
- The early childhood rooms are undersized (approximately 74% of the size standard).
- Each classroom has a sink.
- The casework in the classrooms is not sized for early learners (too high).
- The cafeteria is used as an activity space, as students eat in their classrooms. The kitchen lacks a dishwasher.
- Early childhood spaces lack adjacent restrooms; the restrooms are located down a hall.
- There is no covered play area and the only play structure is not accessible and is distant from most of the classrooms.
- Office staff have no active supervision of the main entrance.

EDUCATIONAL PROGRAM FORECAST

- Facilities upgrades to pre-k classrooms to support the needs of early learners.

ELEMENTARY SCHOOLS

ABERNETHY ELEMENTARY SCHOOL

ADDRESS
2421 SE ORANGE AVE

CONSTRUCTION DATE
1924 (PRIMARY)

LEVELS
2

BLDG AREA
48,246 SF

SITE AREA
171,191 SF
3.93 ACRES

CLASSROOMS COUNT
21

FUNCTIONAL CAPACITY
522 STUDENTS

CLUSTER
CLEVELAND

MODULAR CLASSROOMS
2

ZONING
RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

The Abernethy Elementary School consists of a two-story school building, an attached one-story classroom wing and two portable classrooms. Located in the primarily single family residential neighborhood of the Ladd's Addition Historic District in Southeast Portland, it was built in 1924 in the Classical Revival style.

The building is a reinforced concrete structure with brick veneer, cast stone, and terra cotta ornamentation. The two-story school building is covered by a flat roof and sits on a concrete foundation.

The school is situated on a grass-covered and asphalt campus with a play field southwest of the main building. There are asphalt-covered playgrounds west and south of the school. A covered, open-sided play shed is located northwest of the school. An arboretum/garden and gazebo are located to the north of the building. Two detached portable buildings occupy the northeast end of the parcel.

The 1924 Classical Revival style school is recommended as eligible for the National Register of Historic Places (NRHP) for its association with progressive era public school construction in Portland (Criterion A).

RESJ CONSIDERATIONS

Facility improvements would not be especially impactful to underserved communities as Abernethy serves a less diverse student population with relatively low poverty levels compared to the district averages.

» For the 2021-22 school year, 10% of students are historically underserved; this is well below the K-5 school mean (34%).
» For the 2021-22 school year, 8% of students qualify for free or reduced lunch, significantly below the elementary school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Abernethy is forecast at 90% utilization. By the 2030-31 school year, utilization is projected to decline to 84%.

FACILITY CONDITION SUMMARY

Originally constructed in 1924, Abernethy Elementary School is 97 years old, and in poor condition with a facility condition index (FCI) score of 0.16. As the average FCI score for K-5 schools in PPS is 0.18, the building is in slightly better condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The majority of the HVAC system had exceeded its typical design life. The boilers were aged; however, their burners were retrofitted to natural gas in 2006. The condensate pump package was heavily corroded. The classrooms had unit ventilators, while other areas of the facility utilized air handling units and fin tube radiators.
» The facility's water heater, located in the boiler room, was replaced around 2012.
» The plumbing fixtures were aged but operational. The majority of the water closet flush valves had been updated with dual-flush handles.

Fire Protection

» The fire alarm control panel and fire alarm devices had recently been replaced and had no major deficiencies observed or reported.
» The main facility was protected by a wet pipe sprinkler system covering the majority of the building including the corridors, stairwells, auditorium balcony, and classroom entrances. There were no major deficiencies observed or reported.

Electrical

» The main distribution switchboard and the majority of the panel boards in this facility had exceeded their typical design lives. The switchboard and some of the older panels were manufactured by Federal Pacific, whose breakers have been known to fail to trip when overloaded, thus creating a fire hazard.
» The majority of the interior lighting had been replaced; however, there were still some older fixtures in place which were in need of replacement.

Arch/Struct/Site

» The flooring in the kitchen area was beyond design life. Staff reported that the floor's poor condition and kitchen cooler's elevation make it difficult to transfer food racks.

RECENT CAPITAL EXPENDITURES

» Carpet Replacement (one room) in 2018
» Drinking Fountain Fixture Replacements in 2021

EDUCATIONAL SUITABILITY

» Classrooms are significantly undersized (60% of size standard). Two kindergarten classrooms are located in portables. One kindergarten classroom lacks a dedicated, adjacent restroom.
» The school does not include purposely designed spaces for special education. No SPED classrooms are present.
» The school has neither a dedicated art room nor a science room.
» Furniture and finishes are worn and dated in appearance.
» A stage is present.
» An appropriately sized, dedicated music classroom is provided.
» The campus lacks drop-off lanes; all vehicle and bus access is along the street.
» There are multiple security challenges at this site, including the lack of a controlled main entrance, inadequate fencing, and poor lines of sight.
» The gym is greatly undersized (less than 50% of standard).
» The library is undersized and is essentially a repurposed corridor.
» The cafeteria and kitchen are undersized with poor acoustics.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Re-purpose space to create an art exhibition area.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of All Gender Task Force, (including restrooms).
» Re-purpose existing space

to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
» Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.

Moderate Priority

» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the District's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

AINSWORTH ELEMENTARY SCHOOL

ADDRESS
2425 SW VISTA AVE

CONSTRUCTION DATE
1912 (PRIMARY)

LEVELS
2

BLDG AREA
57,188 SF

SITE AREA
165,092 SF
3.79 ACRES

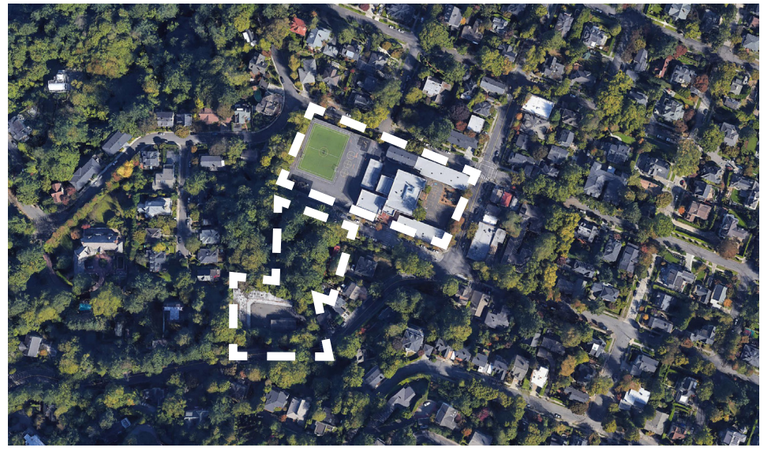
CLASSROOMS COUNT
28

FUNCTIONAL CAPACITY
636 STUDENTS

CLUSTER
LINCOLN

MODULAR CLASSROOMS
4

ZONING
RESIDENTIAL 5,000 CU



HISTORICAL SUMMARY

The Ainsworth Elementary School is situated in a primarily single family residential neighborhood in the Southwest Hills District of Portland, located on Vista Avenue. The campus consists of a main classroom building, gymnasium addition, a detached four- classroom wing, an annex that is located on a hill above the main campus, a covered playshed, and three interconnected portable buildings containing six classrooms. Built in 1912, the Collegiate Gothic style main building is a flat roof, two-story, reinforced concrete structure with brick veneer and terra cotta and cast stone ornamentation.

The school is situated on a tree-lined but predominantly asphalt-covered campus with playgrounds located to the northwest and southeast of the main building. A double height gymnasium was constructed in 1928. A covered, opensided play shed, built in 1935, is located adjacent to the northwest corner of the building. Three detached portable buildings located at the north end of the parcel were added between 1948 and 1953. The rectangular, detached classroom wing was constructed in 1953, while the one story, L-shape annex was built in 1962.

The 1912 Collegiate Gothic style school is recommended as eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Facility improvements would not be especially impactful to underserved communities, as Ainsworth serves a slightly less diverse student population with relatively low poverty levels compared to the district average.

» For the 2021-22 school year, 23% of students are historically underserved; this is less than the K-5 school mean (34%).
» For the 2020-21 school year, 6% of students qualified for free or reduced lunch, well below the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Ainsworth is forecast at 99% utilization. Utilization is projected to remain steady over the next decade, declining slightly to 98% by the 2030-31 school year.

FACILITY CONDITION SUMMARY

Originally constructed in 1912, Ainsworth Elementary School is 109 years old, and in poor condition with a facility condition index (FCI) score of 0.16. As the average FCI score for K-5 schools in PPS is 0.18, the building is in slightly better condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The boilers and air handlers in the main building were replaced in the 1970s.
- Temperature control issues were reported in the main building and north addition.
- The HVAC equipment for the gym addition was replaced in 2018.
- The plumbing fixtures had no deficiencies observed. The domestic water piping and sanitary waste piping were not visible for assessment, but had no deficiencies reported.

Fire Protection

- The school had a wet pipe sprinkler system that served the basement of the building.
- The fire alarm control panel and alarm devices had no deficiencies observed.

Electrical

- The electrical distribution equipment had exceeded typical design life.
- Distribution branch wiring and grounding systems were not visible for assessment, but had no deficiencies reported.

Arch/Struct/Site

- The main wood entry doors on the main building and north addition were heavily worn.
- The wood window frames on the south addition were heavily weathered with flaking paint.
- The exterior bricks on the west end of the south addition had significant step cracking and joint separation.
- On the gym addition, the original wood window frames were heavily weathered with flaking paint.
- The majority of the roof covering on the annex was covered in moss and appeared to be beyond its design life.
- The gutters and downspouts were not draining properly.
- The majority of the interior finishes in all buildings were well-maintained, but beyond their design lives.

RECENT CAPITAL EXPENDITURES

- Select Flooring Replacements in 2018-19
- Drinking Fountain Fixture Replacements in 2021

EDUCATIONAL SUITABILITY

- The layout of the campus has multiple detached buildings with poor lines of sight. Classrooms are distributed among five (5) buildings with disparate conditions.
- Furniture and finishes are worn and dated in appearance.
- A small art room is present in the Annex; however, it is less than 50% of the recommended size and positioned far from most classrooms.
- Performing arts spaces are rated as adequate.
- The school does not include purposely designed spaces for special education. No SPED classrooms are present.
- The cafeteria and kitchen are undersized with poor acoustics and no natural light.
- The gym is greatly undersized (less than 50% of standard).
- The campus lacks drop-off lanes; all vehicle and bus access is along the street.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Re-purpose space to create an art exhibition area.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Facilities upgrades to existing art classroom to align with the district's Educational Specifications with a working, properly ventilated kiln.

Moderate Priority

- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

ALAMEDA ELEMENTARY SCHOOL

ADDRESS
2732 NE FREMONT ST

CONSTRUCTION DATE
1922 (PRIMARY)

LEVELS
2

BLDG AREA
65,765 SF

SITE AREA
159,865 SF
3.67 ACRES

CLASSROOMS COUNT
34

FUNCTIONAL CAPACITY
792 STUDENTS

CLUSTER
GRANT

MODULAR BLDG
2

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Situated between the Irvington and Alameda neighborhoods of northeast Portland, the Alameda Elementary School campus consists of a 1922 Ushaped building and two 1918 portable buildings. The primary Colonial Revival building is a one-story wood structure ornamented by a pediment topped portico and gabled roofs with rounded dormers. Double loaded corridors provide access to the administrative offices located along the north wing and classrooms located along the east and west wings of the building. Two classroom additions were made to the original building in 1954 and 1992.

Within four years of the construction of the primary building, an auditorium and classroom wings located off the south end of the east and west sides of the building were added to the school. Also in 1925, the sheltered play courts, located along the interior elevations of east and west wings, were enclosed to form a gym and additional classroom space. Other additions include the construction of a kitchen in 1951, classroom addition off the south end of the west wing in 1954, and more classrooms off the south end of the east elevation in 1992.

The 1922 Colonial Revival school and 1918 ancillary buildings are recommended as eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Facility improvements would not be especially impactful to underserved communities, as Alameda serves a less diverse student population with relatively low poverty levels compared to the district average.

- For the 2021-22 school year, 10% of students are historically underserved; this is less than the K-5 school mean (34%).
- For the 2020-21 school year, 4% of students qualified for free or reduced lunch, well below the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Alameda is forecast at 84% utilization. By the 2030-31 school year, utilization is projected to decline to 81%.

FACILITY CONDITION SUMMARY

Originally constructed in 1922, Alameda Elementary School is 99 years old, and in poor condition with a facility condition index (FCI) score of 0.2. As the average FCI score for K-5s is 0.18, the building is in worse condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The boilers and air handlers in the main building were replaced in the 1970s.
- Temperature control issues were reported in the main building and north addition.
- The HVAC equipment for the gym addition was replaced in 2018.
- The plumbing fixtures had no deficiencies observed. The domestic water piping and sanitary waste piping were not visible for assessment, but had no deficiencies reported.

Fire Protection

- The school had a wet pipe sprinkler system that served the basement of the building.
- The fire alarm control panel and alarm devices had no deficiencies observed.

Electrical

- The electrical distribution equipment had exceeded typical design life.
- Distribution branch wiring and grounding systems were not visible for assessment, but had no deficiencies reported.

Arch/Struct/Site

- The main wood entry doors on the main building and north addition were heavily worn.
- The wood window frames on the south addition were heavily weathered with flaking paint.
- The exterior bricks on the west end of the south addition had significant step cracking and joint separation.
- On the gym addition, the original wood window frames were heavily weathered with flaking paint.
- The majority of the roof covering on the annex was covered in moss and appeared to be beyond its design life.
- The gutters and downspouts were not draining properly.
- The majority of the interior finishes in all buildings were well-maintained, but beyond their design lives.

RECENT CAPITAL EXPENDITURES

- Water Heater Replacement in 2018
- Replacement of Boiler Room Condensate Tank in 2018
- Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

- Classroom sizes vary greatly, with some rooms only 58-75% of required size standard. The two SPED classrooms only meet 75% of the size standard.
- A dedicated art room is not present, though a kiln is located adjacent to the music room.
- An auditorium with a small stage is present. There is also a second stage connected to the cafeteria in the Annex.
- A library media center with a makerspace is present.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom

ARLETA ELEMENTARY SCHOOL

ADDRESS
5109 SE 66TH AVE

CONSTRUCTION DATE
1929 (PRIMARY)

LEVELS
2

BLDG AREA
71,185 SF

SITE AREA
182,081 SF
4.18 ACRES

CLASSROOMS COUNT
29

FUNCTIONAL CAPACITY
696 STUDENTS

CLUSTER
FRANKLIN

MODULAR CLASSROOMS
0

ZONING
OS - OPEN SPACE CU

HISTORICAL SUMMARY

Arleta Elementary School is located in the Mt. Scott-Arleta Neighborhood of Southeast Portland. In addition to the main school building and an L-shaped detached annex built in 1953, the campus includes a playfield and asphalt-covered play areas situated on a rectangular parcel. The primary school building is a rectangular, two-story structure covered by a flat roof. The reinforced concrete building, clad in variegated brick, rests on a poured concrete foundation. Designed in the Classical Revival style, the building is divided bi-laterally by a projecting bay embellished with pilasters and rounded arches.

Development in the Mt. Scott-Arleta Neighborhood consists of a mixture of single family houses, small commercial facilities, and multi-family residential buildings.

Arleta Elementary retains a high degree of integrity and is therefore eligible for the National Register of Historic Places under Criterion A as an example of school planning.

RESJ CONSIDERATIONS

Arleta's student population is largely reflective of district-wide averages for K-5 schools:

» For the 2021-22 school year, 27% of students identified as BIPOC; this is below the K-5 school mean (34%).
» For the 2021-22 school year, 28% of students qualified for free or reduced lunch; this is slightly less than the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Arleta is forecast at 49% utilization. By the 2030-31 school year, utilization is projected to decline to 44%.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Originally constructed in 1929, Arleta Elementary School is 92 years old, and in poor condition with a facility condition index (FCI) score of 0.23. As the average FCI score for K-5 schools in PPS is 0.18, the building is in worse condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The majority of the mechanical and plumbing system were aged and had exceeded their intended design lives. Boiler 1 has had frequent issues. Both boilers' associated piping was heavily corroded.

Fire Protection

» The fire alarm control panel and fire alarm devices had exceeded design life.
» The main facility had a wet-pipe sprinkler system typically covering the classrooms and corridors. No major deficiencies were observed or reported with the fire protection system at the time of assessment.

Electrical

» Half of the distribution panel boards had exceeded design life. The generator and transfer switch in the boiler room had exceeded design life. There was a photovoltaic array installed on the roof, installed around 2015. The PV array was in good condition.

Arch/Struct/Site

» Paint was chipped off the older steel window frames on the exterior allowing the steel to corrode.
» Minor blisters and moderate degranulation was occurring on the rolled roofing, and some of the roof drains were partially clogged. There was heavy moss growth on the roof covering under the PV panels.
» There were a few crumbled bricks in the exterior wall and the brick mortar appeared to be weakening or separating from the bricks.
» The concrete stairs on the west exterior were heavily cracked and crumbling.
» Where present, the wood window frames and trim have flaking paint and cracked sealant, mainly at the auditorium.
»

RECENT CAPITAL EXPENDITURES

» Water Heater Replacement in 2018
» Replacement of Boiler Room Condensate Tank in 2018
» Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

» Classroom sizes vary greatly, with some rooms only 58-75% of required size standard. The two SPED classrooms only meet 75% of the size standard.
» A dedicated art room is not present, though a kiln is located adjacent to the music room.
» An auditorium with a small stage is present. There is also a second stage connected to the cafeteria in the Annex.
» A library media center with a makerspace is present.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Evaluate Arleta as a possible candidate for adding or repurposing space to provide two (2) appropriately sized and designed pre-k classrooms to support the needs of early learners in Southeast Portland.
» Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
» Re-purpose space to create an art exhibition area.
» Security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom

per the district's Educational Specifications.
» Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.
» Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.

Moderate Priority

» Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the District's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

ATKINSON ELEMENTARY SCHOOL

ADDRESS
5800 SE DIVISION ST

CONSTRUCTION DATE
1953 (PRIMARY)

LEVELS
1

BLDG AREA
54,472 SF

SITE AREA
132,858 SF
3.05 ACRES

CLASSROOMS COUNT
25

FUNCTIONAL CAPACITY
567 STUDENTS

CLUSTER
FRANKLIN

MODULAR CLASSROOMS
0

ZONING
R2 RESIDENTIAL 2,000 CU

HISTORICAL SUMMARY

Constructed in the Northwest Regional style, Atkinson Elementary School is located northeast of Clinton Park in Southeast Portland. Designed to be expanded as enrollment increased, the campus consists of three buildings connected by covered passageways. The single-story buildings form a variation on a finger plan type school with decentralized functions that became popular in the mid-twentieth century.

Clinton Park surrounds the campus on the south and west. Franklin High School is also located adjacent to the park. The surrounding district comprises primarily single family residences built between 1900-1950. Directly adjacent to the tree shaded play areas of Clinton Park, the campus retains a pastoral quality despite its urban location. The facility consists of three single story building units configured in roughly an L-shaped plan with connecting corridors. Between the buildings courtyard spaces provide natural light and furnish connections to the outdoors.
An excellent example of a finger plan school with a decentralized and functionally segregated floor plan, Atkinson Elementary School is eligible for the NRHP under Criterion C.

RESJ CONSIDERATIONS

Facility improvements would not be especially impactful to underserved communities, as Atkinson serves a slightly less diverse student population with relatively low poverty levels compared to the district average.

» For the 2021-22 school year, 31% of students are histrorically underserved; this is below the K-5 school mean of 34%.
» For the 2021-22 school year, 17% of students qualified for free or reduced lunch; this is less than the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Atkinson Elementary is forecast

at 70% utilization. By the 2030-31 school year, utilization is projected to decline to 62%.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Originally constructed in 1953, Atkinson Elementary School is 68 years old, and in poor condition with a facility condition index (FCI) score of 0.18. The average FCI score for K-5 schools in PPS is 0.18.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the mechanical and plumbing system were aged and had exceeded their intended design lives. Signage was present throughout indicating pipe and equipment insulation contained asbestos.

Fire Protection

- The fire alarm control panel and fire alarm devices were approaching the end of design life.
- A sprinkler system was not observed in any of the facilities on site. However, there was a fire suppression standpipe connected to fire hose cabinets located throughout all facilities. There were no deficiencies observed or reported at the time of assessment.

Electrical

- Approximately 65% of the distribution panel boards had exceeded design life. There was a photovoltaic array installed on the roof, installed around 2015. The PV array was in good condition.

Arch/Struct/Site

- Stained acoustic ceiling tiles were observed.
- A few cracked and missing floor tiles were observed in the student restrooms.
- Exterior engineered wood wall panels have been repainted, but the underlying wood was heavily weathered.
- The exterior metal doors were moderately dented
- The exterior metal doors of Bldg B and C were moderately dented.
- A few cracked and missing floor tiles were observed in the student restrooms of Bldg C.
- The carpet in the library of Bldg C was worn and bunching.

RECENT CAPITAL EXPENDITURES

- Lead Paint Abatement in 2017.
- Fire Alarm Upgrades in 2020.

EDUCATIONAL SUITABILITY

- There are few flexible spaces that allow for differentiated instruction.
- The finishes are worn and dated throughout the building.
- The kindergarten classrooms are 75% of the size standard.
- The SPED classroom lacks a dedicated ADA restroom with changing table.
- The music room is greatly undersized (67% of size standard).
- A dedicated art room is not present.
- The gym is slightly undersized and lacks acoustical treatments.
- The library media center is greatly undersized (55% of size standard) and not centrally located.
- The multipurpose room/cafeteria is undersized with a small stage.
- The campus lacks drop-off lanes; all vehicle and bus access is along the street.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Re-purpose space to create an art exhibition area.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.

Moderate Priority

- Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

BEACH ELEMENTARY SCHOOL

ADDRESS
1710 N HUMBOLDT ST.

CONSTRUCTION DATE
1928 (PRIMARY)

LEVELS
3

BLDG AREA
70,498 SF

SITE AREA
227,819 SF
5.23 ACRES

CLASSROOMS COUNT
33

FUNCTIONAL CAPACITY
750 STUDENTS

CLUSTER
JEFFERSON

MODULAR CLASSROOMS
3

ZONING
R5 - RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Beach School is situated in the primarily single family residential Overlook neighborhood in North Portland. The campus consists of a two-story school building with a ground floor basement, a detached classroom building , and an L-shaped portable. Built in 1928, the Collegiate Gothic style building is a reinforced concrete structure clad with brick veneer and cast stone ornamentation. The H-shaped corridor plan of the primary building sits on a concrete foundation.

The school faces North Humboldt Street, with play fields and playgrounds south and west of the main school building. South of the main building is a one story 13-classroom annex, and a one-story three-classroom Head Start facility. The school's parking area is located to the west of the main building.

In comparison with other Portland schools during the same period and constructed of similar styles, Beach Elementary School retains its integrity and is therefore eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Beach School's student population is largely reflective of PPS' district-wide averages for K-5 schools:

- For the 2021-22 school year, 45% of students are historically underserved; this is above the K-5 school mean (34%).
- For the 2021-22 school year, 24% of students qualified for free or reduced lunch; this is slightly below the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Beach Elementary is forecast at 55% utilization. By the 2030-31 school year, utilization is projected to decline slightly to 53%.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Beach School is 93 years old, and in poor condition as with a facility condition index (FCI) score of 0.17. As the average FCI score for K-5 schools in PPS is 0.18, the building condition is slightly better than many elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of restroom lavatories, classroom sinks, and urinals had exceeded typical design life.
- The domestic water piping and sanitary waste piping was assumed to be original and assumed to have exceeded typical design life.
- One of the water heaters and both boilers had exceeded typical design life.
- The classroom ventilators and fan coil units had exceeded typical design life.

Fire Protection

- The fire alarm control panel and alarm devices were in good condition with no deficiencies observed.
- The fire suppression system had exceeded its design life.

Electrical

- Approximately 12 of the distribution panel boards had exceeded typical design life.

Arch/Struct/Site

- Staff noted a known rodent issue in the main building, annex, and portable.
- The exterior wood windows were aged beyond typical design life.
- There were large areas of alligator cracking on the upper roof area of the main building. There was organic growth on the roof covering on the east sections of the lower roof.
- The asphalt surfaces had large areas of alligator cracking.

RECENT CAPITAL EXPENDITURES

- Sewer Line Replacement in 2019
- Sidewalk / Curb Replacement in 2018
- Wireless Upgrades in 2020
- Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

- The building has very few flexible learning areas.
- Classroom sizes range from 67% to 93% with most less than 80% of the size standard. The kindergarten classrooms are 75% of the size requirement.
- The room finishes are worn and dated.
- This facility does not have space that is purposely designed for special education.
- The gym is 54% of the size standard.
- The school has some VAPA resources, such as an undersized art room, a kiln, a small dedicated music room, and an auditorium with a stage.
- The cafeteria is 70% of the size standard with an undersized kitchen.
- The east side of the campus has no perimeter fencing.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.

Moderate Priority

- Add an outdoor covered play structure or construct/re-purpose a structured movement

room (2,000 SF) to support P.E. instruction.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

BEVERLY CLEARY - HOLLYROOD K-1

ADDRESS
3560 NE HOLLYROOD CT

CONSTRUCTION DATE
1958 (PRIMARY)

LEVELS
1

BLDG AREA
15,541 SF

SITE AREA
37,897 SF
0.87 ACRES

CLASSROOMS COUNT
9

FUNCTIONAL CAPACITY
228 STUDENTS

CLUSTER
GRANT

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Hollyrood Elementary School is located in the Grant Park neighborhood of Northeast Portland. The inconspicuous property includes only the main school building. The one story building reflects the International style through its horizontal appearance, glazed curtain walls, low slope butterfly roof and wide overhanging eaves.

The property is bounded by Hollyrood Ct. to the north, Grant Park to the south, NE 36th Ave. to the east, and NE 35th Pl. to the west. A playshed not located on PPS property is situated to the south of the school within Grant Park. The school occupies much of the property although a small play area is positioned to the east of the school. Development in the surrounding area consists primarily of single family residences built between 1910 and 1950.

The school is not eligible for the NRHP under Criterion A & C.

RESJ CONSIDERATIONS

» Please refer to Beverly Cleary Fernwood (K-8).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Beverly Cleary (both Fernwood and Hollyrood combined) is forecast at 80%. Enrollment is expected to decline over the next several years, reaching 68% (for both Fernwood and Hollyrood combined) by 2030-31.

FACILITY CONDITION SUMMARY

Beverly Cleary (Hollyrood) School is 63 years old, and in fair condition with a facility condition index (FCI) score of 0.1. As the average FCI score for K-5 schools in PPS is 0.18, the building is in better condition than most elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the plumbing fixtures had exceeded their typical design lives. The domestic water distribution equipment was recently replaced.
- The vast majority of the heating and cooling equipment, exhaust fans, and associated equipment had exceeded their design lives.

Fire Protection

- The building was partially sprinkled. The piping was estimated to be original to the building and had exceeded its typical design life.
- An addressable fire alarm system headend (Potter PFC-6800) and associated detection and signal devices were installed in 2019.

Electrical

- The building's 208Y/120V main electrical switchboard was original to the building (1958) and had exceeded its typical design life. Four of the five panel boards were also original to the building and had exceeded their typical design lives, while panelboard IT1 had been added as part of a telecommunications upgrade in 1997.

Arch/Struct/Site

- The metal roof hatch had weak springs that did not adequately support the weight of the hatch and the latch hardware had rust corrosion.
- The play area's bituminous paving had excessive alligator cracking throughout.
- The parking lot's top surface was degraded and there was linear and alligator cracking throughout.

RECENT CAPITAL EXPENDITURES

- ADA Upgrades (door knob replacements) in 2019
- Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

- The school lacks a music room, and art room, and any sort of performing arts area or stage.
- The school lacks a gym as well as a cafeteria. Makeshift classrooms are used both for physical activity and dining functions.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Re-purpose space to create an art exhibition area.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.
- Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.

Moderate Priority

- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the District's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

BOISE-ELIOT ELEMENTARY SCHOOL

ADDRESS
620 N FREMONT ST.

CONSTRUCTION DATE
1926 (PRIMARY)

LEVELS
2

BLDG AREA
65,248 SF

SITE AREA
173,804 SF
3.99 ACRES

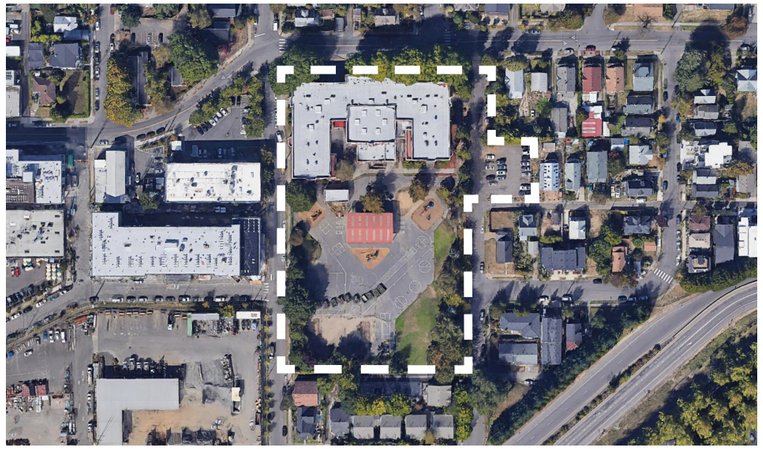
CLASSROOMS COUNT
35

FUNCTIONAL CAPACITY
651 STUDENTS

CLUSTER
JEFFERSON

MODULAR CLASSROOMS
0

ZONING
R1 RESIDENTIAL 1,000 CU



HISTORICAL SUMMARY

Boise-Eliot Elementary School is a two story reinforced concrete building with brick veneer designed in the Classical Revival style. The campus consists of a U-shaped building , a concrete block storage shed , and a covered play shed. Constructed in 1927, the school exhibits extensive use of cast-stone ornamentation to express its Classical Revival style. The school features projecting bays, bay windows, and bands of vinyl sash windows that are arranged symmetrically.

The neighborhood consists of a mix of single family residences, multi-story apartments, and commercial buildings built primarily between 1910 and 1950. The Boise-Eliot campus occupies one-and-one-half city blocks and part of a right-of-way. The school is located on the north end of the campus, with play areas and open space on the south end of the campus, and parking is provided on the west end of the campus. A covered play shed (1980) and a concrete block storage building (1990) are located to the south of the primary building.

While Boise-Eliot Elementary School is a notable historic resource, it does not retain a level of historical integrity commensurate with other Portland schools constructed during the same period; therefore, it is not eligible for listing in the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Boise-Eliot Elementary School has multiple attributes that place it in a high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals.

- For the 2021-22 school year, 75% of students are historically underserved this is significantly above the K-5 school mean of 34%.
- For the 2021-22 school year, 55% of students qualified for free or reduced lunch; this is significantly more than the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Boise-Eliot is forecast at 56% utilization. Utilization is projected to remain steady with a slight decline to 55% by 2030-31.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Boise-Eliot Elementary School is 95 years old, and in poor condition with a facility condition index (FCI) score of 0.2. As the average FCI score for K-5 schools in PPS is 0.18, the building is in slightly worse condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the plumbing fixtures had exceeded typical design life.
- The domestic water piping and sanitary waste piping was assumed to be original and had assumed to have exceeded typical design life.
- Both water heaters and boilers had exceeded typical design life.
- The ventilation exhaust fans/ supply fans had exceeded typical design life.
- The pneumatic controls and associated air compressor had exceeded typical design life.

Fire Protection

- The fire alarm control panel and alarm devices were in good condition with no deficiencies observed.
- The fire suppression system had exceeded its design life.

Electrical

- The head custodian reported the need for security around the attached playground/asphalt surface. No current fencing or cameras in the rear of the school.
- The main distribution switchgear and approximately 15 of the distribution panels had exceeded typical design life.
- The interior lighting and master clock system were approaching the end of typical design life.
- The natural gas generator had exceeded typical design life.

Arch/Struct/Site

- Staff noted lack of security cameras and lack of adequate site fencing. Staff reported that needles were frequently found during early morning cleaning around the play areas.
- Multiple staff noted a known rodent issue in ceiling areas.
- The majority of interior architectural components had exceeded design life.
- The metal exterior stairs and handrails had large areas of corrosion.
- The metal canopy at the covered play area had areas of rust on the beams and columns.
- The asphalt surfaces had large areas of alligator cracking.

RECENT CAPITAL EXPENDITURES

- Fire Sprinkler Repairs in 2019
- Gym Floor Refinishing in 2019
- Security Upgrades to Main Office in 2020
- Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

- General classrooms and special education classroom are undersized. Kindergarten classroom sizes in particular only meet 50-60% of the size standard.
- A small science room is present.
- The gym is undersized with inadequate storage.
- The school has both a music room and an art room.
- An auditorium is present, though it has poor acoustics.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Add or re-purpose space for a structured movement room (2,000 SF) to support P.E. instruction. If space for a structured movement area is unavailable, construct an additional covered play structure.
- Re-purpose space to create an art exhibition area.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource

Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.

Moderate Priority

» Construct a new gymnasium.
» Expand, relocate and/or re-purpose pre-k classroom space to support effective early childhood instruction and programming.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

BRIDGER ELEMENTARY SCHOOL

ADDRESS
7910 SE MARKET ST

CONSTRUCTION DATE
1951 (PRIMARY)

LEVELS
1

BLDG AREA
48,948 SF

SITE AREA
253,955 SF
5.83 ACRES

CLASSROOMS COUNT
26

FUNCTIONAL CAPACITY
561 STUDENTS

CLUSTER
FRANKLIN

MODULAR CLASSROOMS
6

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

The Bridger School (originally Hudson Primary) is a one story brick veneer building designed in the International style. The campus consists of a single story brick-faced building built in 1951 expanded to form a modified E-shaped plan in 1959 , and two portable classroom buildings. The wings that comprise the arms of the E-shaped plan are separated by two exterior courtyards and form a finger plan type school. The building features a linear composition and asymmetrical plan.

The campus occupies an irregular shaped parcel that is bound on the north by SE Market Street, on the east by SE 80th Street, on the south by SE Mill Street, and on the west by single family homes. The school is located on the east end of the campus, and parking is provided along the north and west sides of the building. Recreational facilities include playground space along the south end of the building, and play fields occupy the west end of the campus. Two portable classroom buildings are located to the south of the main facility and along the east end of the campus.

While Bridger School is associated with PPS post war development, the building does not display the level of integrity and significance to make it eligible for listing in the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Bridger Elementary School has attributes that place it in a moderately high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals.

» For the 2021-22 school year, 50% of students are historically underserved; this is greater than the K-5 school mean (34%).
» For the 2021-22 school year, 24% of students qualified for free or reduced lunch, slightly less than the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Bridger School is forecast at 67% utilization. By the 2030-31 school year, utilization is projected to decline to 60%.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Bridger School is 70 years old, and in poor condition with a facility condition index (FCI) score of .24. As the average FCI score for K-5 schools in PPS is 0.18, the building is in worse condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The roof drains had missing or damaged covers and were blocked by debris build-up.
» Most of the HVAC equipment was original to the facility's construction in 1951 and had exceeded its typical design life.

Fire Protection

» The facility did not have a fire suppression system.

Electrical

» The site's service entrance equipment was replaced in 1998. However, the majority of the electrical system was original to the facility's construction and had exceeded its typical design life.

Arch/Struct/Site

» There was moderate ponding occurring across the roof covering. The coating on the roof covering was heavily deteriorated and cracking throughout the surface. The gutters were moderately corroded and detached in one area on the southwest corner.
» The majority of the interior finishes were aged beyond their typical design lives, with many floor tiles or ACT ceiling tiles having been patched numerous times.
» The exterior brick wall was heavily weathered, particularly on the south wall with major cracking occurring in the southeast corner of the building.
» The exterior wood siding on the south façade was weathered with flaking paint.
» The exterior doors and windows had exceeded their design lives.

RECENT CAPITAL EXPENDITURES

» Select Flooring Replacements in 2018
» Modular classroom addition in 2019
» Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

» There are no designed spaces to support differentiated learning activities or groups.
» The school does not include purposely designed spaces for special education.
» A slightly undersized science classroom is present (82% of size standard).
» The school lacks both a dedicated music room and art room.
» The gym is undersized (62% of size standard).
» The library media center lacks an office or work room.
» The cafeteria has a stage. The servery is poorly configured.
» The main entrance lacks a buzzer/camera system or security vestibule.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Re-purpose space to create an art exhibition area.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
» Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.
» Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.

Moderate Priority

» Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

BRIDLEMILE ELEMENTARY SCHOOL

ADDRESS
4300 SW 47TH DR

CONSTRUCTION DATE
1958 (PRIMARY)

LEVELS
1

BLDG AREA
56,220 SF

SITE AREA
316,618 SF
7.27 ACRES

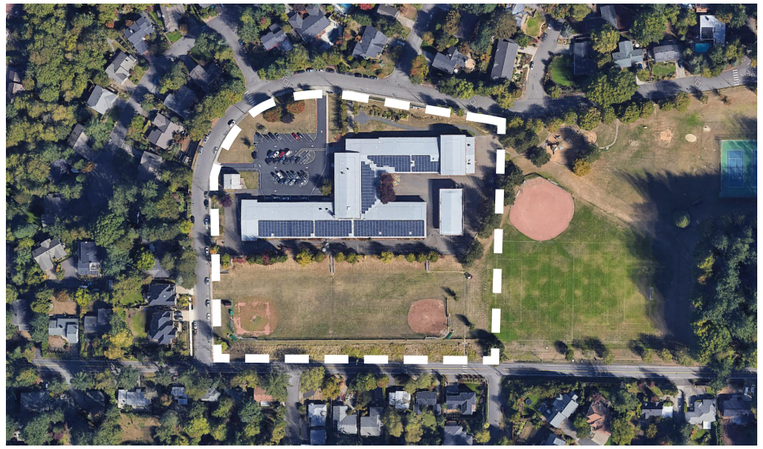
CLASSROOMS COUNT
26

FUNCTIONAL CAPACITY
645 STUDENTS

CLUSTER
WELLS-BARNETT

MODULAR CLASSROOMS
0

ZONING
R7 RESIDENTIAL 7,000 CU



HISTORICAL SUMMARY

Bridlemile School is located in Southwest Portland. The campus consists of the primary school building, a detached portable classroom , and a covered playshed. The finger plan type school incorporates an interior garden to provide maximum light and ventilation to the classrooms. The school's campus is located at the northwest corner of Hamilton Park. Development in the neighborhood consists primarily of single family residences on large parcels of land built between 1950 and 2000. Three playfields are located at the south end of the parcel.

The H-shaped primary school building rests on a poured concrete foundation. The wood frame building is clad in variegated brick. A moderately pitched gable roof covers the single story building.

A good example of the finger plan type school that retains its integrity with its floor plan, interior finishes, fenestration, and cladding, Bridlemile School is recommended as eligible for the NRHP.

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Bridlemile serves a less diverse student population with relatively low poverty levels compared to the district average.

- For the 2021-22 school year, 17% of students are historically underserved; this is below the K-5 school mean (34%).
- For the 2021-22 school year, 8% of students qualified for free or reduced lunch, significantly below the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Bridlemile is forecast at 72% utilization. By the 2030-31 school year, utilization is projected to decline slightly to 69%.

FACILITY CONDITION SUMMARY

Bridlemile School is 63 years old, and in poor condition with a facility condition index (FCI) score of 0.17. As the average FCI score for K-5 schools in PPS is 0.18, the building is in slightly better condition than many elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the mechanical and plumbing system were aged and had exceeded their intended design lives. Signage was present throughout indicating pipe and equipment insulation contained asbestos. The condensate pump package in the mechanical room has been actively leaking. The leak has caused the neighboring water heater and expansion tank to begin to corrode.

Fire Protection

- The fire alarm control panel and devices were upgraded in 2018 and were in good condition with no deficiencies observed.
- The main facility had a wet-pipe sprinkler system typically that served the auditorium's back of stage area. No major deficiencies were observed or reported with the fire protection system at the time of assessment.

Electrical

- Approximately 75% of the distribution panel boards had exceeded design life. There was a photovoltaic array installed on the roof, installed around 2015. The PV array was in good condition.

Arch/Struct/Site

- The exterior wood doors were moderately to heavily weathered.
- Most of the downspouts were leaking during rain.
- The exterior engineered wood paneling was flaking paint.
- A few moderate to major cracks were observed in the brick interior walls in the north corridors and boiler room.
- The gutter was leaking water down the exterior wall of Portable 1.
- The parking lot was resealed in 2018. There were two significant potholes that need repaired.
- The paved play area south of the school was moderately cracked and several locations heaved along tree line.
- The concrete sidewalk was cracked north of the main entrance.
- The covered play structure had damage to the wood cladding.
- Finishes are worn and dated.
- A dedicated art room is not present.
- The SPED classroom is appropriately sized but lacks storage.
- The gym is greatly undersized (63% of size standard).
- The main entry is not easily supervised or directly visible.
- A art room is not present.
- A dedicated music room and a small performing arts area is provided.

RECENT CAPITAL EXPENDITURES

- Portable Classroom Abatement in 2017
- Play Structure Replacement in 2018
- Select Flooring Replacements in 2018
- ADA Upgrades in 2019
- Drinking Fountain Fixture Replacements in 2021

EDUCATIONAL SUITABILITY

EDUCATIONAL PROGRAM FORECAST

High Priority

- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom

per the district's Educational Specifications.
» Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.

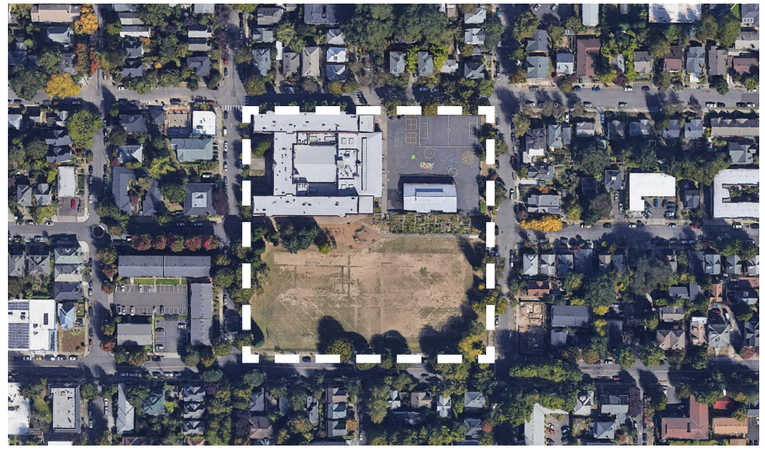
Moderate Priority

» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

BUCKMAN ELEMENTARY SCHOOL



ADDRESS
320 SE 16TH AVE

CONSTRUCTION DATE
1921 (PRIMARY)

LEVELS
2

BLDG AREA
74,161 SF

SITE AREA
211,702 SF
4.86 ACRES

CLASSROOMS COUNT
28

FUNCTIONAL CAPACITY
654 STUDENTS

CLUSTER
CLEVELAND

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Situated in the Buckman neighborhood of Southeast Portland, the 1921 Buckman Elementary School consists of a U-shaped plan. The two-story Collegiate Gothic building is constructed of concrete with a facing of decorative brickwork and terra cotta detailing.

The primary building was constructed in phases between 1922 and 1930. Alterations include the remodeling of the library in 1967 and 1977 and the school office in 1984. Other alterations include the replacement of ceiling tiles (1962), floor tiles (1985, 1988, and 1989), exterior doors (1987), windows (1987), classroom cabinets (1990), and lighting fixtures.

RESJ CONSIDERATIONS

Facility improvements would not be especially impactful to underserved communities, as Buckman serves a less diverse student population with relatively low poverty levels compared to the district average.

» For the 2021-22 school year, 26% of Buckman's students are historically underserved; this is less than the K-5 school mean of 34%
» For the 2021-22 school year, 21% of students qualified for free or reduced lunch, below the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Buckman Elementary is forecast at 69% utilization. By the 2030-31 school year, utilization is projected to decline slightly to 66%.

FACILITY CONDITION SUMMARY

Buckman Elementary School is 100 years old, and in poor condition with a facility condition index (FCI) score of 0.19. As the average FCI score for K-5 schools in PPS is 0.18, the building is in slightly worse condition than many of the elementary schools in the district.

Facility condition assessments

conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- There were temperature control issues in classroom 112 at the time of the assessment. The heat would not turn off and a portable air condition unit was being used to cool the room down.
- The majority of the domestic water distribution equipment had been replaced in the past three years.
- The boilers were replaced in the early 2000s, and in 2015 the rooftop exhaust fans were replaced and large destratification fans were added to the gym. The remaining equipment was original to facility construction.
- The plumbing fixtures had no deficiencies observed. The domestic water piping and sanitary waste piping were not visible for assessment, but had no deficiencies reported.

Fire Protection

- The school had a wet pipe sprinkler system that served the entire building.
- The fire alarm control panel and alarm devices had no deficiencies observed.
-

Electrical

- The electrical distribution equipment had no deficiencies observed. Distribution branch wiring and grounding systems were not visible for assessment, but had no deficiencies reported.

Arch/Struct/Site

- Moderate cracking was occurring in the south exterior concrete wall.
- One roof hatch was tearing at its hinge. Moderate surface corrosion was present on both roof hatches.
- Multiple concrete exterior stairs had cracks or were crumbling or broken.
- The VCT in the cafeteria was coming loose in spots, with stress cracking in many of the tiles.
- The wood floor was delaminating throughout the cafeteria and gymnasiums.
- There was a major crack in the southwest retaining wall.

RECENT CAPITAL EXPENDITURES

- Sewer Line Repairs in 2018
- Stage Refinishing in 2020
- Drinking Fountain Fixture Replacements in 2021

EDUCATIONAL SUITABILITY

- Small, poorly configured classrooms do not support a range of learning styles. General classrooms meet 75% of the size standard.
- Finishes are worn and dated.
- The school does not have purposely designed spaces for Special Education.
- Music spaces are located adjacent to the cafeteria which creates noise issues during instructional periods.
- Art rooms are present but have limited storage and equipment. The sinks and wet areas do not have the proper flooring, drains or ventilation.
- The gym is undersized (72% of size standard) with worn flooring.
- The cafeteria, kitchen and servery are undersized and do not have access to natural light.
- There are no designated parent / student pick-up and drop-off areas.
- There are no controlled entrances throughout the building.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Add or re-purpose space for a structured movement room (2,000 SF) to support P.E. instruction. If space for a structured movement area is unavailable, construct an additional covered play structure
- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.

Moderate Priority

- Construct a new gymnasium.
- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

CAPITOL HILL ELEMENTARY SCHOOL

ADDRESS
8401 SW 17TH AVE

CONSTRUCTION DATE
1917 (PRIMARY)

LEVELS
2

BLDG AREA
51,812 SF

SITE AREA
192,100 SF
4.41 ACRES

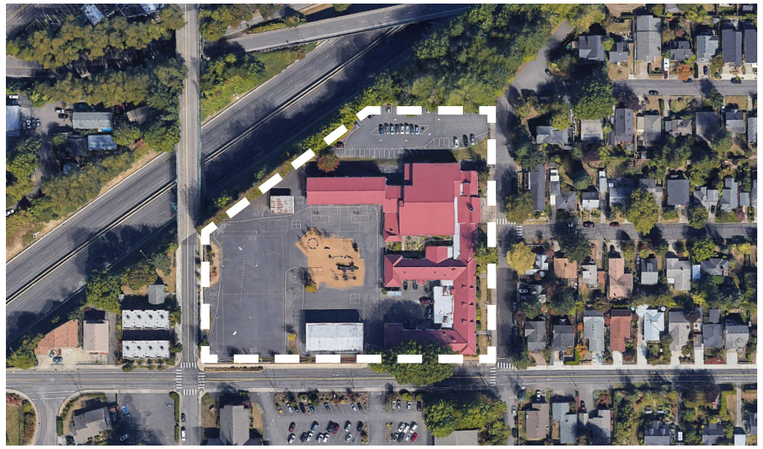
CLASSROOMS COUNT
20

FUNCTIONAL CAPACITY
456 STUDENTS

CLUSTER
WELLS-BARNETT

MODULAR CLASSROOMS
1

ZONING
RESIDENTIAL 5,000 CU



HISTORICAL SUMMARY

Capitol Hill Elementary School is located in Southwest Portland. The primary building on the school campus is an E-shaped classroom and administrative building situated at the southeast corner of the lot. Originally constructed in 1917, the building received significant additions in 1948 and again in 1952. Other structures on the property include a 1968 portable classroom and a 1977 covered playshed.

The original building was designed in the Colonial Revival style with the primary architectural ornamentation focused on the entries to the original building.

The School is located in the Markham neighborhood. Development in the neighborhood consists of a mixture of educational and religious institutions, single family residences, and recent multi-family residential developments. An asphalt-covered parking lot and play areas provide a buffer from Interstate 5 which runs along the north and west sides of the campus.

Due to the lack of integrity the buildings are not eligible for the National Register of Historic Places under Criterion A, B, or C.

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Capitol Hill serves a less diverse student population with relatively low poverty levels compared to the district average.

- For the 2021-22 school year, 17% of students are historically underserved; this is below the K-5 school mean of 34%.
- For the 2021-22 school year, 12% of students qualified for free or reduced lunch, as compared to a district-wide (K-5) school mean of 26%.

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Capitol Hill Elementary is forecast at 83% utilization. By the 2030-31 school year, utilization is projected to decline to 78%.

FACILITY CONDITION SUMMARY

Capitol Hill Elementary School is 104 years old, and in poor condition with a facility condition index (FCI) score of 0.20. As the average FCI score for K-5 schools in PPS is 0.18, the building is in slightly worse condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the mechanical and plumbing system were aged and had exceeded their intended design lives. Signage was present throughout indicating pipe and equipment insulation contained asbestos. Ducting observed in the south addition's attic was damaged and not properly sealed allowing air to escape.

Fire Protection

- The fire alarm control panel and devices were upgraded in 2018 and were in good condition with no deficiencies observed.
- No fire suppression systems were observed at the site.

Electrical

- Approximately 55% of the distribution panels had exceed design life. The generator and transfer switch had both exceeded design life.

Arch/Struct/Site

- The roof was not accessible, but the gutters were full of debris that was visible from the ground level.
- The exterior engineered wood siding and window trim was flaking paint and had signs of water infiltration.
- The east exterior stairs of the North Building were spalling with some moderate cracks.
- Acoustic ceiling tiles were stained in various areas.
- The east concrete exterior stairs of the South Building were mossy with some moderate to major cracking.
- The exterior door of Portable 1 was moderately dented.
- The hard play area pavement was cracked, most noticeably at the northwest elevation. There were areas of pavement heaving caused by tree roots along west property line.
- Parking stops were missing and/or deteriorated.

RECENT CAPITAL EXPENDITURES

- Security Upgrades in 2017
- Installation of Bouldering Wall in Gym in 2017
- Playground Addition in 2018
- Asbestos Remediation in 2020
- Drinking Fountain Fixture Replacements in 2021

EDUCATIONAL SUITABILITY

- Classrooms and common spaces have dated and failing finishes.
- The school does not have purposely designed spaces for Special Education.
- There is no dedicated music room.
- An art room is present.
- The gym is 74% of the recommended size.
- There is no direct line of sight to the main entry. The entry doors cannot be remotely controlled from the main office.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Re-purpose space to create an art exhibition area.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.

Moderate Priority

» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

CHAPMAN ELEMENTARY SCHOOL

ADDRESS
1445 NW 26TH AVE

CONSTRUCTION DATE
1923 (PRIMARY)

LEVELS
3

BLDG AREA
64,385 SF

SITE AREA
294,901 SF
6.77 ACRES

CLASSROOMS COUNT
28

FUNCTIONAL CAPACITY
618 STUDENTS

CLUSTER
LINCOLN

MODULAR CLASSROOMS
3

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Situated in a primarily single family, residential neighborhood in the Northwest District of Portland, the Chapman Elementary School campus consists of a primary classroom building, a portable building, and a covered playshed. Built in 1923, the main building is a flat roof, reinforced concrete structure with brick cladding. The square mass of the building rests on a concrete foundation. Designed in the Classical Revival style, the building features cast stone ornamentation and a concrete classical-style front entry with Ionic columns. The two-story building features a basement, and provides facilities for classrooms, a gymnasium, an auditorium, playrooms, and an administrative office.

The Chapman Elementary School, which faces Wallace Park, is situated on a mostly grass-covered campus. Recreational facilities include a substantial playfield located to the west of the main building and asphalt covered playgrounds to the north and northwest of the school.

A covered, open-sided play shed is located on the northwest corner of the campus. The portable is located at the south end of the parcel.

Chapman Elementary School retains excellent integrity with minimal alterations to its plan, exterior, and interior finishes. The 1923 Classical Revival school is recommended as eligible for the National Register of Historic Places (NRHP) for its association with progressive era public school construction in Portland (Criterion A).

RESJ CONSIDERATIONS

Facility improvements would not be especially impactful to underserved communities; Chapman's student population is relatively less diverse and with lower poverty rates than the average PPS (K-5) school.

» For the 2019-20 school year, 31% of Chapman's students are historically underserved; this is less than the K-5 school mean of 34%.
» For the 2020-21 school year, 27% of Chapman students qualified

for free or reduced lunch; this is slightly above the K-5 school mean of 26%.

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Chapman Elementary is forecast at 70% utilization. By the 2030-31 school year, utilization is projected to increase to 77%.

FACILITY CONDITION SUMMARY

Chapman Elementary School is 98 years old, and in critical condition with a facility condition index (FCI) score of 0.43. As the average FCI score for K-5 schools in PPS is 0.18, the building is in significantly worse condition than most other elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- Plumbing fixtures were aged but operational. The water closet flush valves had been updated with dual-flush handles.
- The boilers in the basement were replaced in 1977 and other major HVAC equipment was original to the facility.

Fire Protection

- The fire alarm system was observed to be in average condition with no major deficiencies.

Electrical

- Seven panels were found to be aged past typical design life. A majority of the electrical service and distribution had exceeded typical design life.
- The interior lighting, generator, grounding system, and automatic transfer switch had exceeded typical design life.
- The communications system was found to be in average condition with no major deficiencies.

Arch/Struct/Site

- The automatic door opener and lock mechanism at the ADA entrance were reported by facility staff to not function properly. The staff in the main office were often not able to activate the ADA door when someone uses the intercom system.
- The HVAC system in Portable 1 was reported to be troublesome even after several parts were recently replaced. One of the units had caught fire last year, but has since been replaced with a "used" unit.
- The roof coverings on the Main Building and Portable 1 were observed to be aged, blistered, cracked, and had moss growth in various areas.
- The lower built-up roofs with metallic top coating had exceeded typical design life, their top coating was deteriorated and cracked, and significant debris had collected in ponding areas and drain paths.
- The original metal frame skylights on the upper and lower roofs had corroded metal frames and deteriorated sealant.
- The fiberglass domes on the newer skylights on the upper roof had a deteriorated top gel coat and exposed fiberglass mesh, which was also beginning to deteriorate.
- Facility staff reported that the large wood mounted movable partitions between the gym/cafeteria and the auditorium were not operable.
- The vinyl composition tile (VCT) in the kitchen had exceeded typical design life and had excessive cracking throughout.

RECENT CAPITAL EXPENDITURES

- New Playground Installation in 2018
- Asbestos Remediation in 2020

EDUCATIONAL SUITABILITY

- There are few designed spaces to support differentiated learning or flexible groups.
- The general classrooms in the building meet approximately 75% of the size standard.
- No elevator is present.
- The school lacks purposely designed special education spaces.
- A dedicated music room and art room are present.
- Two (2) spaces for P.E. are provided; however, one is a small cafegymatorium.
- An auditorium with balcony seating and a small stage is present.
- The library media center lacks an office and workroom. It is also located on the 2nd floor (no elevator).
- The campus lacks drop-off lanes; all vehicle and bus access is along the street.
- The school has some perimeter fencing, but is open on all sides.
- The main entrance lacks a buzzer/camera system and remains open all day. There is no control of the main entrance from the office.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Add or re-purpose space to provide two (2) appropriately sized and designed pre-k classrooms to support the needs of early learners.
- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.

Moderate Priority

- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

CHIEF JOSEPH ELEMENTARY SCHOOL

ADDRESS
2409 N SARATOGA STREET

CONSTRUCTION DATE
1949 (PRIMARY)

LEVELS
2

BLDG AREA
44,859 SF

SITE AREA
129,809 SF
2.98 ACRES

CLASSROOMS COUNT
20

FUNCTIONAL CAPACITY
499 STUDENTS

CLUSTER
JEFFERSON

MODULAR CLASSROOMS
2

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Situated in the Arbor Lodge neighborhood of North Portland, Chief Joseph Elementary School occupies the southern portion of the campus. In addition to the main school building, the campus also features a portable classroom building. The wood frame school building is constructed in the International style. Cladding consists of a mixture of horizontal board, brick, and poured concrete. A shallow pitched gable roof covers the rectangular shaped building that rests on a poured concrete foundation. The two-story east wing includes two floors of classrooms and a double height gymnasium and auditorium.

Development in the vicinity of the school consists of a mixture of single family residences built between 1929 and 1950, larger multi-family residential buildings, and commercial buildings. Arbor Lodge Park is located across N Delaware Avenue from the west side of the school campus. Asphalt covered play areas are located on the north side of the campus.

A good example of a mid-twentieth century school design, that retains its integrity with its finger plan and many exterior and interior finishes intact, Chief Joseph Elementary School is recommended as eligible for the NRHP.

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Chief Joseph Elementary School serves a less diverse student population with relatively low poverty levels compared to the district average.

» For the 2019-20 school year, 26% of students are historically underserved; this is less than the K-5 school mean of 34%.
» For the 2020-21 school year, 19% of students qualified for free or reduced lunch; this is less than the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Chief Joseph Elementary is forecast at 64% utilization. By the 2030-31 school year, utilization is projected to decline to 58%.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Chief Joseph Elementary School is 72 years old, and in poor condition with a facility condition index (FCI) score of 0.19. As the average FCI score for K-5 schools in PPS is 0.18, the building is in slightly worse condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The majority of the plumbing fixtures had exceeded typical design life.
» The domestic water piping and sanitary waste piping was assumed to be original and assumed to have exceeded typical design life.
» The boiler had exceeded typical design life.
» The ventilation exhaust fans/ supply fans had exceeded typical design life.
» The classroom ventilators and heaters had exceeded typical design life.
» The pneumatic controls and associated air compressor had exceeded typical design life.

Fire Protection

» The fire alarm control panel and alarm devices were in good condition with no deficiencies observed.
» The fire suppression system had exceeded its design life.

Electrical

» The main distribution switchgear and approximately 11 of the distribution panels had exceeded typical design life.
» The interior lighting was approaching the end of typical design life.

Arch/Struct/Site

» The majority of interior architectural components had exceeded design life.
» The exterior wood windows were aged beyond typical design life.
» The paint on the exterior wood siding and soffits was beginning to deteriorate.
» The asphalt surfaces had large areas of alligator cracking.
» The carpeting in the portable had exceeded design life and the wood door was observed to be cracked.

RECENT CAPITAL EXPENDITURES

» Playground Restriping in 2017

EDUCATIONAL SUITABILITY

» There are few designed spaces to support differentiated learning.
» The school lacks an elevator.
» The school lacks purposely designed special education spaces.
» The gym meets approximately 65% of the size standard.
» A dedicated art room is not present.
» Music is taught in a general classroom.
» A small stage is provided.
» The school does not have a buzzer/camera at the front door and there is no active supervision of the door from the office.
» The cafeteria is adequately sized, but the kitchen and servery are small.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
» Re-purpose space to create an art exhibition area.
» Security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.

- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.
- Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.

Moderate Priority

- Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

CRESTON ELEMENTARY SCHOOL

ADDRESS
4701 SE BUSH ST

CONSTRUCTION DATE
1948 (PRIMARY)

LEVELS
1

BLDG AREA
79,978 SF

SITE AREA
376,358 SF
8.64 ACRES

CLASSROOMS COUNT
27

FUNCTIONAL CAPACITY
558 STUDENTS

CLUSTER
FRANKLIN

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Creston Elementary School is situated in Creston Kenilworth neighborhood of Southeast Portland. Built in 1946, the school building is situated on a mostly grass-covered campus. Additional structures on the parcel include the 1953 Creston Annex which is a contributing resource. The International style school is L-shaped with flat and low pitched gable roofs. The single story building rests on a poured concrete foundation. Cladding for the wood frame structure consists of a mixture of brick veneer and stucco.

The school facilities include classrooms, a gymnasium, a library, an auditorium, and a cafeteria. Development in the surrounding area consists primarily of single family residences built after World War II and larger commercial buildings along SE Powell and SE Foster Roads. Grass covered playfields separate the main school building from the Creston Annex. The campus is adjacent to the tree shaded Creston Park.

Creston Elementary School is recommended as eligible for the National Register of Historic Places under Criterion A for its associations with the growth of the Portland Public School district in the mid twentieth century.

RESJ CONSIDERATIONS

Creston's student population is largely reflective of district-wide averages for K-5 schools:

- For the 2019-20 school year, 31% of students identified as BIPOC; this is slightly than the K-5 school mean of (34%).
- For the 2020-21 school year, 24% of students qualified for free or reduced lunch, which is the same as the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Creston Elementary School is forecast at 47% utilization. By the 2030-31 school year, utilization is projected to decline to 42%.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Creston Elementary School is 73 years old, and in poor condition with a facility condition index (FCI) score of 0.16. As the average FCI score for K-5 schools in PPS is 0.18, the building is in slightly better condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- Most of the domestic water equipment had been replaced in the past eight years and was observed to be in good condition.
- The majority of HVAC equipment was original to the facility and had exceeded its typical design life.

Fire Protection

- The facility did not have a fire suppression system.

Electrical

- The majority of the site's electrical system, including the service entrance equipment and distribution panel boards, had exceeded their typical design lives. The lighting throughout both facilities had been retrofitted to LED.

Arch/Struct/Site

- The exterior wood trim was heavily weathered and cracking and much of the paint had flaked off.
- The brick wall had severe separation and crumbling mortar; primarily on the south and west walls.
- Many long, narrow cracks were observed in the finish layer on the exterior concrete walls. Much of the exterior paint on the exterior concrete walls or wood siding had been patched with different shades of paint.
- Many of the interior wood doors displayed above-average surface wear.
- Many of the interior finishes were in average condition but had exceeded their typical design lives, such as ACT ceiling tiles, vinyl tile flooring and ceramic tile floor and wall coverings.

RECENT CAPITAL EXPENDITURES

- Annex Playground Upgrades in 2017
- ADA Upgrades to ISC Restroom in 2020
- Boiler Reinsulation and Replacement of Condensate Tank in 2018
- Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

- General classrooms are generously sized, exceeding the size standard.
- The self-contained special education space in the school is a space originally designed for a music room. It does not have a sink, nor does it have an adjacent ADA restroom. The room also lacks natural light.
- A slightly undersized science classroom is present (87% of size standard).
- There is not a dedicated music room. Music is taught on the stage.
- There is not a dedicated art classroom.
- The gym is undersized (65% of standard) and lacks acoustical treatments.
- The school lacks an entry vestibule. The main office does not have remote control of the main entry doors.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.
- Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.

Moderate Priority

- Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
- Facilities upgrades to pre-k classrooms to support the needs of early learners.
- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

DUNIWAY ELEMENTARY SCHOOL

ADDRESS
7700 SE REED COLLEGE PL

CONSTRUCTION DATE
1926 (PRIMARY)

LEVELS
2

BLDG AREA
68,775 SF

SITE AREA
245,243 SF
5.63 ACRES

CLASSROOMS COUNT
27

FUNCTIONAL CAPACITY
552 STUDENTS

CLUSTER
CLEVELAND

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Situated in the Eastmoreland neighborhood of Southeast Portland, Duniway Elementary School is a two story L-shaped building is situated at the northwest corner of the parcel. The reinforced concrete structure, faced in red brick, rests on a poured concrete foundation. The gable roof that covers the central wing is clad in red clad pantiles. Designed in the Collegiate Gothic style, the building features prominent cross gable roofs that distinguish the entries to the building. The building also features a number of projecting bay windows typically situated above entries or at ends of an elevation.

The neighborhood is comprised primarily of single family residences built 1928-1950. An asphalt covered parking lot is located to the north of the building. Asphalt covered play areas and several grassy play fields occupy the south and east ends of the campus.

Duniway School retains a high degree of integrity and is therefore eligible for the National Register of Historic Places under Criterion A as an example of school planning and the emerging development of the Eastmoreland neighborhood. The school is also eligible under Criterion C as an example of the work of George Jones in the Collegiate Gothic style.

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Duniway serves a largely white student population with low poverty levels.

- For the 2019-20 school year, 10% of students are historically underserved, which is significantly less than the K-5 school mean (34%).
- For the 2020-21 school year, 5% of students qualified for free or reduced lunch, which is significantly lower than the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Duniway Elementary is forecast at 89% utilization. By the 2030-31 school year, utilization is projected to decline to 85%.

FACILITY CONDITION SUMMARY

Duniway Elementary School is 95 years old, and in poor condition as with a facility condition index (FCI) score of 0.13. As the average FCI score for K-5 schools in PPS is 0.18, the building is in better condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the plumbing fixtures had exceeded their design lives. The domestic water distribution equipment was recently replaced and is in good condition.
- The vast majority of the heating and cooling equipment, exhaust fans, and associated equipment had exceeded their design lives.

Fire Protection

- The building did not have a sprinkler system.
- An addressable fire alarm system headend (Silent Knight 5820XL) and associated detection and signal devices were installed (estimated) in 2014.

Electrical

- The building's main distribution switchboard was replaced in 1997, and a sub-distribution board had also been added at that time. A majority of the building's panel boards, however, were observed to have exceeded design life. Two new panel boards had been installed in 1997 as part of the telecommunications upgrade, and another in 2001 with the installation of the generator.

Arch/Struct/Site

- The window frames were aged, cracked and damaged.
- The roof sections had ponding and were aged. Frequent leaks were reported above the cafeteria and east end of the second floor.
- The majority of interior architectural components had exceeded design life.

RECENT CAPITAL EXPENDITURES

- Sidewalk / Curb Replacement in 2018
- Seismic Evaluation in 2018
- Abatement of Hazardous Substances in 2018-19
- Security Upgrades in 2020
- Roofing Replacement in 2020
- Drinking Fountain Fixture Replacements in 2021

EDUCATIONAL SUITABILITY

- Finishes are worn and dated.
- The average classroom size is 82% of the standard.
- The school lacks purposely designed special education spaces.
- A slightly undersized music room is present (88% of size standard).
- A very small (55% of size standard) art room is present, as well as a kiln (though not adjacent).
- Though two P.E. spaces are provided, the total sq. ft. of both gyms is only 76% of the standard.
- A small stage is provided (50% of size standard).
- The cafeteria and kitchen are undersized.
- The site is not adequately fenced.
- The main entrance is not supervised or controlled by the office.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area

to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.

Moderate Priority

» Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

FOREST PARK ELEMENTARY SCHOOL

ADDRESS
9935 NW DURRETT ST

CONSTRUCTION DATE
1998 (PRIMARY)

LEVELS
2

BLDG AREA
62,833 SF

SITE AREA
6.62 SF
288,367 ACRES

CLASSROOMS COUNT
22

FUNCTIONAL CAPACITY
546 STUDENTS

CLUSTER
LINCOLN

MODULAR CLASSROOMS
10

ZONING
R10 RESIDENTIAL 10,000 CU

HISTORICAL SUMMARY

No Data

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities. While Forest Park Elementary has a moderately diverse student body, it has the lowest student poverty rates of any school in the district..

» For the 2021-22 school year, 9% of students are historically underserved; this is below the K-5 school mean (34%).
» For the 2021-22 school year, 0% of students qualified for free or reduced lunch, which is significantly below the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Forest Park Elementary is forecast at 68% utilization. By the 2030-31 school year, utilization is projected to decline to 59%.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Forest Park Elementary School is 23 years old, and in good condition with a facility condition index (FCI) score of 0.05. As the average FCI score for K-5 schools in PPS is 0.18, the building is in significantly better condition than most of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The majority of the domestic water equipment was replaced in 2015 and was observed to be in good condition.
» The rooftop condensing unit serving the kitchen freezer had frozen cooling coils at the time of the assessment.

» Most of the HVAC equipment was original to the facility's construction in 1998.

Fire Protection

» The fire protection system was assumed to be original to construction and had exceeded typical design life.

Electrical

» The electrical distribution system appeared to have been original to construction and was in good condition with no major deficiencies observed.

Arch/Struct/Site

» The aluminum windows of the Main Building had evidence of water infiltration at the window frame/rough opening and at the perimeter glazing gasketing. (Second level windows at STR01 and room #128.)
» The superstructure (supporting the metal roof) of the covered play area was observed to be corroded.
» The roof coverings on all of the portable buildings (1-5) were observed to have moss and organic moss growth on the asphalt shingles causing accelerated deterioration.

RECENT CAPITAL EXPENDITURES

» Wireless Upgrades in 2018.
» Fire Alarm Upgrades in 2019.
» Drinking Fountain Fixture Replacements in 2021.

EDUCATIONAL SUITABILITY

» Half of the classrooms serving grades 3-5 are in portables. The average size of kindergarten classrooms is only 78% of the size standard.
» The school lacks purposely designed special education spaces.
» The music room is 78% of the recommended room size.
» The PE space is 65% of the recommended size.
» No art classroom is present.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
» Re-purpose space to create an art exhibition area.
» Security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
» Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.

Moderate Priority

» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

GLENCOE ELEMENTARY SCHOOL

ADDRESS
825 SE 51ST AVE

CONSTRUCTION DATE
1923 (PRIMARY)

LEVELS
2

BLDG AREA
60,094 SF

SITE AREA
252,648 SF
5.8 ACRES

CLASSROOMS COUNT
27

FUNCTIONAL CAPACITY
600 STUDENTS

CLUSTER
FRANKLIN

MODULAR CLASSROOMS
1

ZONING
R2.5 RESIDENTIAL 2,500 CU

HISTORICAL SUMMARY

Located in the Mt. Tabor neighborhood of East Portland, the 1923 Glencoe Elementary School consists of a two-story reinforced concrete that exhibits a stucco finish. The Mediterranean Revival building has a U-shaped plan with the auditorium and gymnasiums constructed between the arms that form the U-shape. Glencoe Elementary School is ornamented with simple concrete cornices and belt courses. The primary entrance, located on a central pavilion, is marked by a recessed opening with terra cotta detailing. Other entrances are marked by terra cotta surrounds, pilasters, and pediments. Bands of vinyl windows provide the fenestration. The building is capped by a hip roof with ceramic tile. Double loaded corridors provide access to the administrative offices, classrooms, and recreation spaces. The neighborhood consists of single family residences built primarily between 1920 and 1950. The primary entrance to the facility is from SE 51st Avenue. Play areas and open space occupy the western end of the campus. A rectangular portable classroom with flat roof and T-111 siding is located to the north of the primary school facility.

Glencoe Elementary School does not retain a level of historical integrity commensurate with other Portland Elementary Schools constructed during the same period and is therefore not eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities. Glencoe Elementary has a less diverse student body than many elementary schools and low student poverty rates.

» For the 2021-22 school year, 20% of students are historically underserved; this is below the K-5 school mean (34%).
» For the 2021-22 school year, 11% of students qualified for free or reduced lunch, significantly less than the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Glencoe Elementary is forecast at 70% utilization. By the 2030-31 school year, utilization is projected to decline to 66%.

FACILITY CONDITION SUMMARY

Glencoe Elementary School is 98 years old, and in critical condition with a facility condition index (FCI) score of 0.31. As the average FCI score for K-5 schools is 0.18, the building is in significantly worse condition than most of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» Plumbing fixtures were aged but operational. The water closet flush valves have been updated with dual-flush handles.
» Blowdown water from the steam boiler system was causing the floor finish to flake in the boiler room. These flakes were getting caught in the floor drain which reportedly causes flooding.
» The roof drains were blocked by debris build-up, which was causing ponding throughout the roof.
» The boilers were original to the facility but had been retrofitted with gas burners in the past five years.

Fire Protection

» The fire protection system appeared to have been renovated and was in good condition with no major deficiencies observed.

Electrical

» There were 13 distribution panels that were original to construction and had exceeded their typical design life. The remaining electrical distribution equipment was in good condition with no major deficiencies observed.

Arch/Struct/Site

» The stucco exterior wall finish was observed to be cracked in numerous locations.
» The flat roof covering was observed to be aged with blisters in various locations on the surface and the skylights were aged beyond typical design life. The sloped ceramic tile roof was observed to be cracked and had many loose, stained, cracked, and dislodged tiles.
» Portable 1 was observed to be generally aged and had varying degrees of deteriorated interior and exterior systems.
» The retaining walls located throughout the site were observed to have cracks throughout.
» The built-up roof covering's top coats had excessive cracking and the roof had areas of blistering typically caused by moisture intrusion.
» The sloped clay tile roof covering had many cracked and missing tiles throughout. The missing tile locations exposed the wood nailers to the elements and were rotting.
» Two of the five roof hatches were made of wood with a sheet metal covering. They had far exceeded typical design life and had aged and loose hardware. One of the wood roof hatches was not locked from below, which causes a safety and security hazard.
» The fiberglass domes on the skylights on the upper and lower roofs had a deteriorated top gel coat and exposed fiberglass mesh, which was also beginning to deteriorate.
» The spectator seating in the auditorium mezzanine had exceeded typical design life, had worn surfaces, and broken and missing seating.

RECENT CAPITAL EXPENDITURES

» Select Flooring Replacements in 2018
» Wireless Upgrades in 2018
» Installation of Climbing Wall in Gym in 2020
» Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

» This school has no designed spaces to provide flexible groupings or differentiated learning activities.
» General classrooms meet approximately 76% of the size standard.
» No elevator is present.
» The school lacks purposely designed special education spaces.
» The music room is slightly undersized (85% of standard) with acoustical issues.

- There are two PE spaces: the gym and a second space also used for "indoor recess."
- The performing arts space is also the cafeteria. The room has both a main floor and a balcony area with fixed seating. An undersized stage is also present.
- A small art room is present.
- The cafeteria is adequately sized, but the kitchen is small. Acoustical treatments are needed in the cafeteria.
- The main entrance lacks a buzzer or camera and the main office does not have active supervision of the door.
- The campus lacks drop-off lanes; all vehicle and bus access is along the street.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.

Moderate Priority

- Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

GROUT ELEMENTARY SCHOOL

ADDRESS
3119 SE HOLGATE BLVD

CONSTRUCTION DATE
1927 (PRIMARY)

LEVELS
3

BLDG AREA
73,066 SF

SITE AREA
101,930 SF
2.34 ACRES

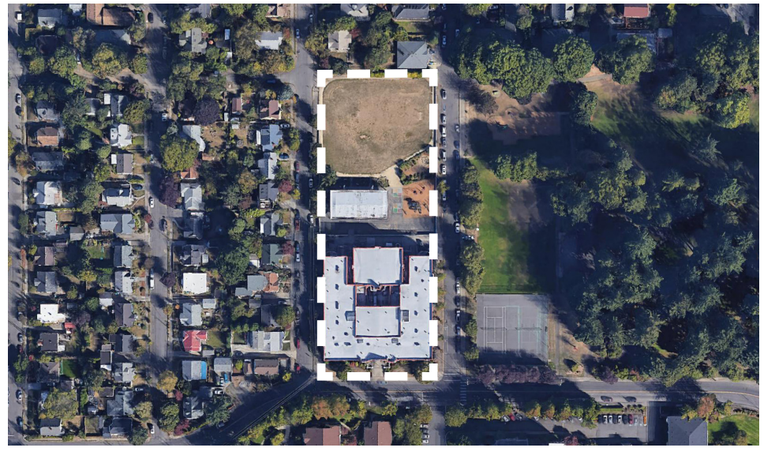
CLASSROOMS COUNT
27

FUNCTIONAL CAPACITY
510 STUDENTS

CLUSTER
CLEVELAND

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU



HISTORICAL SUMMARY

The two-story school building is situated at the south corner of the parcel in the Creston-Kenilworth neighborhood of Southeast Portland. The reinforced concrete structure, faced in red brick rests on a poured concrete foundation. The flat roof is covered in asphalt roofing material. Variations in the brick work including the utilization of bands of soldier courses and sloping brick window sills, provides additional relief on the long elevations.

The Creston-Kelinworth neighborhood of southeast Portland is comprised primarily of single family residences built between 1928-1960. An asphalt-covered parking lot is located to the north of the building. Asphalt-covered play areas and several play fields occupy the north end of the parcel. The property does not contain any other ancillary buildings.

Grout Elementary School retains a high degree of integrity and is therefore eligible for the National Register of Historic Places under Criterion A as an example of school planning and development of the Creston-Kenilworth neighborhood. The school is also eligible under Criterion C as an example of the work of George Jones in the Mediterranean style.

RESJ CONSIDERATIONS

Grout Elementary School has attributes that place it in a moderately high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals.

- For the 2021-22 school year, 25% of students are historically underserved, below the K-5 school mean (34%).
- For the 2021-22 school year, 32% of students qualified for free or reduced lunch; this is above the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Grout Elementary is forecast at 71% utilization. Utilization is projected to

increase slightly to 73% by 2030-31.

FACILITY CONDITION SUMMARY

Grout Elementary School is 94 years old, and in poor condition with a facility condition index (FCI) score of 0.28. As the average FCI score for K-5 schools in PPS is 0.18, the building is in significantly worse condition than most of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The roof drains were blocked by debris build-up which was causing ponding in some areas. The building reportedly has had multiple instances of domestic water pipe failure.
- The classroom unit ventilators were replaced in the 1980s, but the majority of the remaining HVAC equipment was original to facility construction.
- The urinals had exceeded typical design life and were corroded.

Fire Protection

- The school had a wet pipe sprinkler system that served the entire building.
- The fire alarm control panel and alarm devices had no deficiencies observed.

Electrical

- The electrical distribution equipment had no deficiencies observed. Distribution branch wiring and grounding systems were not visible for assessment, but had no deficiencies reported.

Arch/Struct/Site

- The roof covering was moderately deteriorated with ponding occurring throughout.
- The boys restroom on the main floor had daylight coming through a fist-sized hole in the ceiling indicating a hole in the roofing.
- Many of the student lockers were dented and the paint was worn and chipped.
- The carpet was worn and bunching in several classrooms.
- The laminated wood flooring had water damage in the cafeteria and some delamination occurring in a couple areas.

RECENT CAPITAL EXPENDITURES

- Play structure Replacement in 2018
- Boiler Reinsulate in 2018
- Fire Alarm Upgrades in 2019
- Drinking Fountain Fixture Replacements in 2021

EDUCATIONAL SUITABILITY

- Classroom sizes are 71% of the standard. Flexible learning areas are very limited.
- Finishes are worn and dated.
- Special education classrooms are undersized (76% of standard) and not located near supportive areas.
- No dedicated music room is present.
- A general classroom has been converted into a small art room (58% of size standard).
- The gym is 36% of the recommended standard.
- Aesthetically striking performing arts spaces is provided with a small stage.
- The library media center is an inviting and creative space, but somewhat small (80% of size standard).
- The cafeteria, kitchen and servery are well-placed but undersized.
- No visibility of controlled entry point to allow for monitoring of the main entry by office staff.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.

Moderate Priority

- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

HAYHURST ELEMENTARY SCHOOL

ADDRESS
5037 SW IOWA ST

CONSTRUCTION DATE
1954 (PRIMARY)

LEVELS
2

BLDG AREA
50,314 SF

SITE AREA
323,215 SF
7.42 ACRES

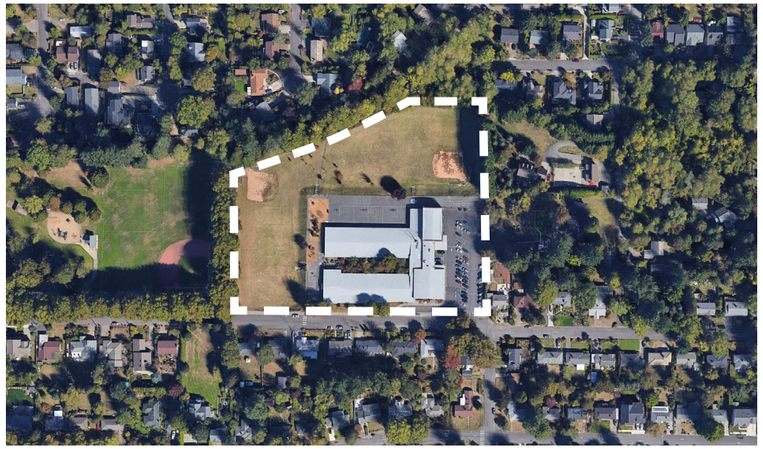
CLASSROOMS COUNT
23

FUNCTIONAL CAPACITY
546 STUDENTS

CLUSTER
WELLS-BARNETT

MODULAR CLASSROOMS
0

ZONING
R7 RESIDENTIAL 7,000 CU



HISTORICAL SUMMARY

The primary school building is immediately surrounded by playgrounds and an asphalt-covered parking lot. Situated at the crest of a hill, several play fields associated with Pendleton Park are located on a terrace to the west of the school building. The U-shaped, finger plan type school incorporates an interior garden to provide maximum light and ventilation to the classrooms. Both variegated brick and board-and- batten siding cover the exterior of the building. A moderately pitched gable roof covers the Northwest Regional style building. Fenestration consists of grouped wood frame windows.

Hayhurst Elementary School in Southwest Portland. The school's campus is located at the northeast corner of Pendleton Park. Development in the neighborhood consists primarily of large-lot, single family residences built between 1950 and 2000.

A good example of the finger plan type school that retains its integrity with its floor plan and many exterior and interior finishes intact, Hayhurst Elementary School is recommended as eligible for the NRHP.

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Hayhurst serves a less diverse student population with relatively low poverty levels compared to the district average.

» For the 2021-22 school year, 21% of students are historically underserved, well below the K-5 school mean (34%).
» For the 2020-21 school year, 20% of students qualified for free or reduced lunch, well below the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Hayhurst Elementary is forecast at 72% utilization. By the 2030-31 school year, utilization is projected to decrease to 64%.

FACILITY CONDITION SUMMARY

Hayhurst Elementary School is 67 years old, and in poor condition with a facility condition index (FCI) score of 0.21. As the average FCI score for K-5 schools in PPS is 0.18, the building is in slightly worse condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» There were abandoned plumbing fixtures in the gym and in the restroom between classrooms 7 and 8. Rodents have reportedly entered the building through the water closet in the classroom restroom.
» The boilers were original to the facility but had been retrofitted with gas burners within the past five years.

Fire Protection

» The fire protection system appeared to have been renovated and was in good condition with no major deficiencies observed.

Electrical

» There were approximately 10 panel boards that were original to facility construction. These panel boards were produced by Federal Electric Products and utilized Stab-Lok breakers. These breakers are known to not trip properly when overloaded, leading to a potential fire hazard.

Arch/Struct/Site

» The building envelope was observed to be in good to average condition given the age of the building. No immediate deficiencies were observed.
» What appeared to be original metal toilet partitions had exceeded typical design life, had excessive wear, and had been retrofitted with pieces of newer partition components.
» The painted concrete floor finish in the kitchen and mechanical/ boiler room was heavily worn. In several areas in the mechanical room, the paint had completely worn away to bare concrete.
» The roof hatch opened toward an approximate 4-5 ft drop-off with no railing or caution striping.

RECENT CAPITAL EXPENDITURES

» Lead Paint Abatement in 2017
» Installation of Climbing Wall in Gym in 2019
» Seismic Upgrades in 2019

EDUCATIONAL SUITABILITY

» The school has no designated spaces to support flexible groupings and different learning styles.
» Two SPED rooms are present. They have poor acoustical separation and lack access to an adjacent ADA restroom.
» The school does not have a dedicated music room.
» An art room / makerspace is provided, as well as a kiln.
» A cafeteria with a stage is present. The kitchen and servery are undersized.
» The gym is undersized (68% of size standard).
» The front door has no active control or supervision and no security vestibule.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
» Re-purpose space to create an art exhibition area.
» Security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.

Moderate Priority

» Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

IRVINGTON ELEMENTARY SCHOOL

ADDRESS
1320 NE BRAZEE ST

CONSTRUCTION DATE
1932 (PRIMARY)

LEVELS
2

BLDG AREA
59,874 SF

SITE AREA
150,282 SF
3.45 ACRES

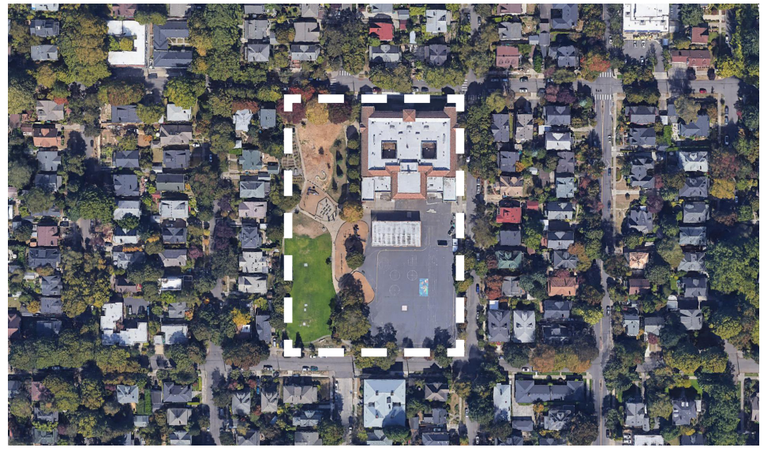
CLASSROOMS COUNT
31

FUNCTIONAL CAPACITY
547 STUDENTS

CLUSTER
GRANT

MODULAR CLASSROOMS
0

ZONING
OS OPEN SPACE CU



HISTORICAL SUMMARY

The two story school building is situated at the northeast corner of the parcel. The reinforced concrete structure, faced in sand colored brick, rests on a poured concrete foundation. Designed in the Mediterranean Revival style, the gable roof is clad in red pantiles. Terra cotta embellishments include decorative panels, label moldings, quoins at the entry, and arched openings at the entries. Fenestration consists of a mixture of metal frame and multi-light wood frame windows.

The school is centered in the Irvington neighborhood of Northeast Portland. The neighborhood is comprised primarily of single family residences built between 1900-1950. A covered play shed and asphalt playground are located at the southeast corner of the campus. The west side of the campus features play equipment, an outdoor stage, and a community garden.

Irvington Elementary School is a good example of the schools designed by George Jones during his tenure as PPS Superintendent of Building. The only school built by Portland Public Schools during the Depression, the school is an important example of community development during the period. In comparison with other Portland schools developed during the same period and constructed of similar styles, Irvington Elementary School retains a high degree of integrity and is therefore eligible for the National Register of Historic Places under Criterion A.

RESJ CONSIDERATIONS

Irvington Elementary School has a moderately diverse student population with lower student poverty levels.

» For the 2021-22 school year, 30% of students are historically underserved, slightly below the K-5 school mean (34%).
» For the 2021-22 school year, 20% of students qualified for free or reduced lunch, below the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Irvington Elementary School is forecast at 58% utilization. Utilization is project to remain steady at 58% through 2030-31.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Irvington Elementary School is 89 years old, and in poor condition with a facility condition index (FCI) score of 0.28. As the average FCI score for K-5 schools in PPS is 0.18, the building is in worse condition than most of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The majority of the HVAC system had exceeded its typical design life. The boilers were aged; however, their burners were retrofitted to natural gas in 2012. The condensate pump package was corroded and degraded; the boiler feed water package was corroded and had signs of leaks. Most of the facility was conditioned by air handling units with heating coils as well as fin tube radiators. The supply air fan serving the classrooms made excessive noise during the time of assessment and required preventative maintenance. Unit ventilators were observed in classrooms 100, 101, 110 and 111.
» The facility had two water heaters located in Room 99. One of the water heaters was replaced in 2019 and was in excellent condition. The other water heater was installed in 2005 and had exceeded its typical design life.
» The plumbing fixtures were aged but operational. The majority of the water closet flush valves had been updated with dual-flush handles. A water cooler in this facility had signage stating that a lead hazard was present

Fire Protection

» The fire alarm control panel and fire alarm devices had recently been replaced and had no major deficiencies observed or reported.
» No fire suppression system was observed in the facility.

Electrical

» The majority of the electrical distribution system, including the main switchboard, went through a full replacement in 1989; the system had exceeded its typical design life. The panel boards supporting the IT systems were the only exception as these panels were installed in 1998. It appeared that the majority of the lighting was also replaced around the 1989 electrical renovation; this system had also exceeded its typical design life with the exception of some new exterior LED lights and some interior exit lighting.

Arch/Struct/Site

» The roof was significantly cracked, and the skylights were beyond design life.
» There were leaks in the boiler room and storage area. Staff reported that the source of the water may be from the adjacent playground hard surface.
» Staff reported the flagpole was hit by a truck and not replaced.

RECENT CAPITAL EXPENDITURES

» Concrete Stairs Repair in 2018
» Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

» Educational suitability information was unavailable for this site.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
» Re-purpose space to create an art exhibition area.
» Security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
» Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.
» Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.

Moderate Priority

» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the District's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

JAMES JOHN ELEMENTARY SCHOOL

ADDRESS
7439 N CHARLESTON AVE

CONSTRUCTION DATE
1929 (PRIMARY)

LEVELS
2

BLDG AREA
64,285 SF

SITE AREA
144,184 SF
3.31 ACRES

CLASSROOMS COUNT
27

FUNCTIONAL CAPACITY
513 STUDENTS

CLUSTER
ROOSEVELT

MODULAR CLASSROOMS
0

ZONING
R1 RESIDENTIAL 1,000 CU
CM2 COMMERCIAL MIXED USE 2

HISTORICAL SUMMARY

James John Elementary School is a two story reinforced concrete building with brick veneer. The campus consists of a U-shaped building, a portable, and a play shed. Constructed in 1929, the school exhibits extensive use of cast-stone ornamentation to express its Classical Revival style.

The school features a central projecting bay and bay windows. Symmetrically arranged aluminum windows provide the fenestration. The middle bay of the front façade projects slightly from the rest of the building. The bay is trimmed with a dentil cornice, cast-stone quoins, and a decorative panel bearing the school's name. The main portals, located at the sides of the bay, are accented with Tuscan columns and a portico topped by an entablature. These classical elements, in addition to the building's symmetrical plan and fenestration, serve to reinforce the ideals of order, balance, and formality.

The North Portland neighborhood consists of a mixture of single family residences, multi-story apartments, and commercial buildings built primarily between 1920 and 1950. The James John Elementary School campus occupies three city blocks and the vacated Kellogg Street/ John Street right-of-way; the school is located on the northeast end of the campus and play areas and open space are on the south and west ends of the campus. A 1944 portable building and 1978 play shed are located to the west of the primary building.

The 1929 Classical Revival school is recommended as eligible for the National Register of Historic Places (NRHP) as a strong example of the principles that characterized the design of schools during this era (Criterion A).

RESJ CONSIDERATIONS

James John Elementary School has multiple attributes that place it in a high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals.

- For the 2021-22 school year, 53% of students are historically underserved, greater than the K-5 school mean (34%).
- For the 2020-21 school year, 36% of students qualified for free or reduced lunch, significantly more than the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, James John School is forecast at 68% utilization. By the 2030-31 school year, utilization is projected to decrease to 64%.

FACILITY CONDITION SUMMARY

James John Elementary School is 92 years old, and in fair condition with a facility condition index (FCI) score of 0.1. As the average FCI score for K-5 schools in PPS is 0.18, the building is in better condition than most of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- Multiple roof drains were blocked by debris and vegetation.
- The rooftop exhaust fans were replaced in 2014 and the majority of the remaining HVAC equipment was original to facility construction.
- The plumbing fixtures had no deficiencies observed. The domestic water piping and sanitary waste piping

Fire Protection

- The building did not have a fire suppression system.
- The fire alarm control panel and alarm devices had no deficiencies observed.

Electrical

- The office staff do not have access to the security camera feed. They reported they lost access after the camera system was upgraded.
- The electrical distribution equipment had no deficiencies observed. Distribution branch wiring and grounding systems were not visible for assessment, but had no deficiencies reported.

Arch/Struct/Site

- In the gym, the recently repaired wood floor was already delaminated, splitting and water damaged.
- In the west addition, the wood floor in the hallways was delaminating and separating.
- The exterior wood doors and windows on the west addition were heavily weathered and worn.
- The majority of the exterior and interior building components were well maintained, but beyond typical design life.
- The exterior window frames in the portable were weathered and cracking.

RECENT CAPITAL EXPENDITURES

- Reinsulated Boiler in 2018
- Playground Replacement in 2018
- Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

- There are few designed spaces to support differentiated learning or flexible groupings.
- General classrooms vary in size, but typically meet approximately 68% of the size standard.
- The SPED classroom is undersized, dimly lit, and lacks a sink, restroom and changing table.
- A music room is not present.
- A small art room is provided (65% of size standard).
- The gym has poor acoustics and only meets approximately 59% of the size standard.
- The performing arts space maintains an inviting and stimulating environment with fixed seating.
- The library media center is centrally located but only meets approximately 72% of the size standard.
- The campus lacks drop-off lanes; all vehicle and bus access is along the street.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security /

alarm system.

- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.
- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

Moderate Priority

- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

KELLY ELEMENTARY SCHOOL

ADDRESS
9030 SE COOPER ST

CONSTRUCTION DATE
1952 (PRIMARY)

LEVELS
1

BLDG AREA
77,995 SF

SITE AREA
400,316 SF
9.19 ACRES

CLASSROOMS COUNT
38

FUNCTIONAL CAPACITY
670 STUDENTS

CLUSTER
FRANKLIN

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Kelly Elementary School is located in Southeast Portland. The campus consists of the primary school building built in 1952 with additional wings added in 1958, a detached portable classroom built in 1969, and a detached L-shaped building built in 1969. The finger plan type school incorporates an interior garden to provide maximum light and ventilation to the classrooms. The single story building rests on a poured concrete foundation. Cladding on the wood frame building consists of a mixture of brick, board-and-batten, and stone. Moderately sloped butterfly and shed roofs cover the irregular mass of the building. Fenestration consists of grouped metal frame windows.

The school's campus is located at the southeast corner of Glenwood Park. Development in the neighborhood consists primarily of single family residences built between 1950-2000. The campus includes asphalt covered parking and play areas surrounding the school buildings. Play fields occupy the northwest portion of the parcel.

A good example of the finger plan type school that retains its integrity with its floor plan and many exterior and interior finishes intact, Kelly Elementary School is recommended as eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Kelly Elementary School has attributes that place it in a moderately high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals.

- For the 2021-22 school year, 34% of students are historically underserved, slightly below the K-5 school mean (34%).
- For the 2021-22 school year, 46% of students qualified for free or reduced lunch, significantly more than the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Kelly

Elementary is forecast at 68% utilization. By the 2030-31 school year, utilization is projected to decline slightly to 67%.

FACILITY CONDITION SUMMARY

Kelly Elementary School is 69 years old, and in poor condition with a facility condition index (FCI) score of 0.24. As the average FCI score for K-5 schools in PPS is 0.18, the building is in worse condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The water heater serving the kitchen and the water heater serving the building had both exceeded their typical design lives.
» Most of the HVAC equipment was original to the facility's construction in 1961 and had exceeded its typical design life.

Fire Protection

» The facility did not have a fire suppression system.

Electrical

» The site's service entrance equipment and a portion of the electrical system's interior distribution was replaced in 1998. However, most of the site's distribution panels and the lighting in the main facility had exceeded their typical design lives.

Arch/Struct/Site

» There was moderate ponding occurring across the roof covering. The coating on the roof covering was heavily deteriorated and cracking throughout. There were many leaks reported, and recent patching failed to address the issues.
» There was a one-foot size hole in the wood panel exterior wall at the east mezzanine fan room, and the rest of the panels were heavily weathered, splintering and flaking paint.
» Leaks were reported in the roof covering on the covered play area canopy.
» The caulk had crumbled away from most of the exterior window frames, and some of the frame caps were loose or had been drilled through multiple times.
» Many of the interior finishes had exceeded their typical design lives, such as ACT ceiling tiles, vinyl tile flooring and ceramic tile floor and wall coverings.
» The wood flooring in the gym was becoming delaminated.

RECENT CAPITAL EXPENDITURES

» Play Structure Addition in 2018
» Courtyard Improvements in 2017
» Radon Mitigation in 2018
» Drinking Fountain Fixture Replacements in 2020
» Seismic Strengthened Roof in 2020

EDUCATIONAL SUITABILITY

» Both the main building and the Annex lack designed spaces to support differentiated learning. Few spaces can accommodate flexible groupings.
» Fixtures and finishes are worn and dated.
» Some general classrooms have carpet, rather than sink/wet area flooring.
» There are several rooms in the Annex used for Head Start. Only one room meets the size standard. The other rooms meet approximately 60% of the standard.
» Special education classrooms are undersized (76% of size standard) and not located near supportive areas.
» The music room is in a large, stand-alone building not connected to the main school building.
» The art room meets approximately 68% of the size standard. There is no separate room for the kiln.
» The gym meets approximately 70% of the size standard.
» The library is located at the end of a hall of classrooms. It is impacted by playground noise.
» The food service area is small for the enrollment and number of daily meals served. Some equipment is stored/serviced in the cafeteria.
» Although the office in the main building is located near the entrance, it lacks visual or active supervision of the door. There is no security vestibule, no buzzer or camera at the entrance.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
» Re-purpose space to create an art exhibition area.
» Security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.

Moderate Priority

» Expand, relocate and/or re-purpose pre-k classroom space to support effective early childhood instruction and programming.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

LEE ELEMENTARY SCHOOL

ADDRESS
2222 NE 92ND AVE

CONSTRUCTION DATE
1953 (PRIMARY)

LEVELS
1

BLDG AREA
63,170 SF

SITE AREA
396,396 SF
9.1 ACRES

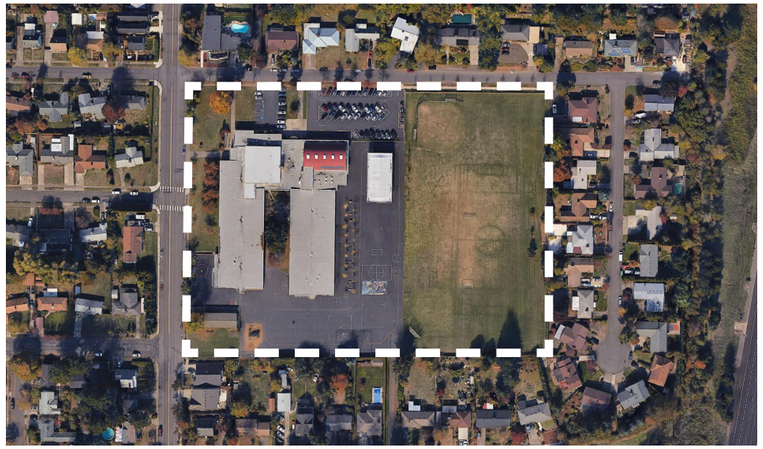
CLASSROOMS COUNT
25

FUNCTIONAL CAPACITY
443 STUDENTS

CLUSTER
MCDANIEL

MODULAR CLASSROOMS
1

ZONING
R5 RESIDENTIAL 5,000 CU



HISTORICAL SUMMARY

Lee Elementary School is situated in a primarily residential neighborhood in Northeast Portland. Facilities on the grass and asphalt-covered campus include the U-shaped school building and a covered playshed. Built in 1953, the International style school building is clad in red brick. The one-story building sits on a poured concrete foundation. The wings that comprise the U-shaped plan are covered with a mixture of shed and flat roofs. The school provides facilities for classrooms, a gymnasium, a cafetorium, a library, and an administrative office. Entry to the school is from the west on NE 92nd Street. The playground, playfields, and a covered play shed are located directly south and east of the school. The parking area is located directly north of the building.

A good example of the finger plan type school in the International style that exhibits a high degree of integrity with its floor plan, cladding, and many interior finishes intact, Jason Lee Elementary School is recommended as eligible for the NRHP.

RESJ CONSIDERATIONS

Lee Elementary School has multiple attributes that place it in a high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals.

- For the 2021-22 school year, 44% of students are historically underserved, well above the K-5 school mean (34%).
- For the 2021-22 school year, 40% of students qualified for free or reduced lunch, significantly higher than the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Lee Elementary is forecast at 60% utilization. By the 2030-31 school year, utilization is projected to decrease to 56%.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Lee Elementary School is 68 years old, and in poor condition with a facility condition index (FCI) score of 0.16 As the average FCI score for K-5 schools in PPS is 0.18, the building is in slightly better condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the plumbing fixtures were aged but operational. The majority of the water closet flush valves had been updated with dual-flush handles.
- The facility's water heater, located in Room 125, had exceeded its typical design life.
- The main facility's boilers were original to the facility but had been retrofitted with gas burners in 2012.
- Six PACE ventilation units were observed throughout the facility and had exceeded their typical design lives.

Fire Protection

- The fire alarm control panel and fire alarm devices had been recently replaced and did not have any major deficiencies observed or reported.
- The facility did not have a fire suppression system.

Electrical

- While several panel boards were recently installed or replaced, including the 1000 amp main distribution panel and several panels supporting the IT equipment, the majority of the electrical distribution equipment had exceeded its typical design life.
- The exterior lighting had been upgraded to LED or CFL fixtures, but the majority of the interior lighting had exceeded its typical design life.

Arch/Struct/Site

- There was cracking and signs of water intrusion on the store room basement walls.
- The exterior wood walls at the roof elevation were deteriorated.
- The gymnasium floor was nearing its end of its design life.
- The exterior wood siding of the covered play area structure was deteriorated.
- Dated and worn finishes throughout the building.
- There is no restroom in the SPED communication behavior classroom. There is a changing table, but it is located in a restroom on the other side of the building.
- The art and music rooms are both undersized.
- The gym is 78% of the size standard
- The stage adjacent to the multipurpose room is undersized.
- The library media center is located in two conjoined classrooms (with an open divider curtain).
- The main entrance doors cannot be remotely controlled by the main office.

RECENT CAPITAL EXPENDITURES

- Roof Repairs in 2018
- Parking Lot Restriping in 2018
- Security Upgrades (Fencing) in 2019
- Playground Expansion for Head Start in 2019
- Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

- There are few spaces that allow for flexible, differentiated instruction.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating

options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.

Moderate Priority

» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

LENT ELEMENTARY SCHOOL

ADDRESS
5105 SE 97TH AVE

CONSTRUCTION DATE
1949 (PRIMARY)

LEVELS
1

BLDG AREA
78,100 SF

SITE AREA
468,270 SF
10.75 ACRES

CLASSROOMS COUNT
32

FUNCTIONAL CAPACITY
707 STUDENTS

CLUSTER
FRANKLIN

MODULAR CLASSROOMS
3

ZONING
R5 RESIDENTIAL 5,000 CU
OS OPEN SPACE CU

HISTORICAL SUMMARY

Situated in the Lents neighborhood of east Portland, the Oliver P. Lent Elementary School campus consists of primary classroom building, an annex, and two portable buildings. The primary building is a single story brick structure ornamented by detailed brick work and roofs clad in copper panels. Aluminum frame windows provide the fenestration. Double loaded corridors provide access to the classroom wings that are located at the north and south wings of the building.

The neighborhood consists of a mixture of single family residences built primarily between 1950 and 2000. The primary entrance to the facility is from SE 97th Street. Play areas and an open space that occupy the western edge of the campus provide a buffer between the school and Interstate 205. Although Lent Elementary School retains excellent integrity with its floor plan and many exterior and interior finishes intact, it is not recommended as eligible for the NRHP.

RESJ CONSIDERATIONS

Lent Elementary School has multiple attributes that place it in a high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals.

» For the 2021-22 school year, 65% of students are historically underserved, much higher than the K-5 school mean (34%).
» For the 2021-22 school year, 46% of students qualified for free or reduced lunch, significantly higher than the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Lent Elementary is forecast at 43% utilization. By the 2030-31 school year, utilization is projected to decrease to 41%.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Lee Elementary School is 72 years old, and in poor condition with a facility condition index (FCI) score of 0.28. As the average FCI score for K-5 schools in PPS is 0.18, the building is in significantly worse condition than most of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The remaining equipment was original to facility construction.
- The plumbing fixtures had no deficiencies observed. The domestic water piping and sanitary waste piping were not visible for assessment, but had no deficiencies reported.

Fire Protection

- The school had a wet pipe sprinkler system that served the entire building.
- The fire alarm control panel and alarm devices had no deficiencies observed.

Electrical

- The electrical distribution equipment had no deficiencies observed. Distribution branch wiring and grounding systems were not visible for assessment, but had no deficiencies reported.

Arch/Struct/Site

- Moderate cracking was occurring in the south exterior concrete wall.
- One roof hatch was tearing at its hinge. Moderate surface corrosion was present on both roof hatches.
- Multiple concrete exterior stairs had cracks or were crumbling or broken.
- The VCT in the cafeteria was coming loose in spots, with stress cracking in many of the tiles.
- The wood floor was delaminating throughout the cafeteria and gymnasiums.
- There was a major crack in the southwest retaining wall.

RECENT CAPITAL EXPENDITURES

- Select Carpet Replacements in 2018
- Wireless Upgrades in 2019
- Fire Alarm Upgrades in 2019
- Drinking Fountain Fixture Replacements in 2020
- Roof Design for SRGP Grant in 2020

EDUCATIONAL SUITABILITY

- General classrooms are appropriately sized.
- The finishes are worn and dated throughout the building.
- The school lacks purposely designed special education spaces.
- The science classrooms are converted general classrooms.
- Music is taught in a portable classroom.
- A dedicated art room is present. The space is somewhat undersized (82% of size standard).
- The gym is small (70% of size standard), dated, and lacking acoustical treatments.
- The library media center is significantly undersized (52% of size standard).
- There is no line of sight from the main office to the main entrance (even though office is positioned relatively closely).

EDUCATIONAL PROGRAM FORECAST

High Priority

- Add or re-purpose space to provide two (2) appropriately sized and designed pre-k classrooms to support the needs of early learners.
- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications. Music is currently taught in a portable classroom.

Moderate Priority

- Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

LEWIS ELEMENTARY SCHOOL

ADDRESS
4401 SE EVERGREEN ST

CONSTRUCTION DATE
1952 (PRIMARY)

LEVELS
1

BLDG AREA
47,389 SF

SITE AREA
237,402 SF
5.45 ACRES

CLASSROOMS COUNT
20

FUNCTIONAL CAPACITY
444 STUDENTS

CLUSTER
CLEVELAND

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Situated in the Woodstock neighborhood of Southeast Portland, Meriwether Lewis Elementary School occupies the northwest portion of the campus. The primary entrance to the campus is from the south on SE Evergreen Street. The L-shaped wood frame building features a variety of cladding including brick veneer, tongue-and-groove wood, and concrete block. The single story building rests on a poured concrete foundation. The wings of the building are clad in a variety of intersecting shed and shallow pitched gable roofs. Fenestration consists of grouped metal and wood frame windows.

Development in the vicinity of the school consists of a mixture of single family residence, larger multi-family residential buildings, and commercial buildings. Asphalt covered play areas are located on the southeast side of the campus. The campus features notable gardens located along its northwest and south east elevations, developed through community partnerships that provide opportunities for environmental education.

Although Lewis Elementary School retains its integrity with its floor plan and many exterior and interior finishes intact, it is not recommended as eligible for the NRHP.

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Lewis serves a less diverse student population with relatively low poverty levels compared to the district average.

» For the 2019-20 school year, 15% of students are historically underserved, well below the K-5 school mean (34%).
» For the 2020-21 school year, 15% of students qualified for free or reduced lunch, well below the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Meriwether Lewis Elementary is forecast at 90% utilization. By the 2030-31 school year, utilization is projected to decrease to 82%.

FACILITY CONDITION SUMMARY

Lewis Elementary School is 69 years old, and in poor condition with a facility condition index (FCI) score of 0.2. As the average FCI score for K-5 schools in PPS is 0.18, the building is in slightly worse condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The classrooms in the north addition were experiencing temperature control issues at the time of the assessment. Staff reported classrooms reaching temperatures of 80 degrees Fahrenheit.
» The plumbing fixtures were aged but operational. The water closet flush valves had been updated with dual-flush handles.
» The boilers were original to the facility and reportedly have constant issues with piping leaks.
» The urinals had exceeded typical design life and were corroded. The domestic water piping and sanitary waste piping were not visible for assessment, but had no deficiencies reported.

Fire Protection

» The school had a wet pipe sprinkler system that served the entire building.
» The fire alarm control panel and alarm devices had no deficiencies observed.

Electrical

» The electrical distribution equipment had no deficiencies observed. Distribution branch wiring and grounding systems were not visible for assessment, but had no deficiencies reported.

Arch/Struct/Site

» Cracking was noted in the exterior brick wall around the gym.
» In the north addition, wood frames were moderately weathered with some cracking caulk and paint. Several cracked window panes were noted.
» In the north addition, exterior metal doors were heavily dented with some minor surface corrosion.
» Most of the wood window frames were heavily weathered with flaking paint.

RECENT CAPITAL EXPENDITURES

» Repaved and Replaced Catch Basin on Site Grounds in 2018
» Seismic Retrofit in 2018

EDUCATIONAL SUITABILITY

» Most general classrooms are sufficiently sized. There are some areas to accommodate flexible learning activities. The kindergarten classrooms are undersized (73% of standard).
» The SPED classroom is undersized and lacks an adjacent ADA restroom.
» The library media center is greatly undersized (63% of standard).
» No art room is present.
» The school has a small dedicated music room.
» The gym is greatly undersized (66% of standard).
» The cafeteria is undersized and lacks natural light.
» The office does not have remote control of the main entry doors.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
» Re-purpose space to create an art exhibition area.
» Security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.

- » Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- » Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.

Moderate Priority

- » Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
- » Re-purpose an existing space into a wellness room.
- » Allocate an area for a Reconnection Services office.
- » Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- » Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- » Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- » Expand P.E. storage by repurposing space and/or adding casework.
- » Allocate instructional, office, and meeting space for Virtual Scholars.

LLEWELLYN ELEMENTARY SCHOOL

ADDRESS
6301 SE 14TH AVE

CONSTRUCTION DATE
1928 (PRIMARY)

LEVELS
2

BLDG AREA
52,204 SF

SITE AREA
143,312 SF
3.29 ACRES

CLASSROOMS COUNT
24

FUNCTIONAL CAPACITY
528 STUDENTS

CLUSTER
CLEVELAND

MODULAR CLASSROOMS
3

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Llewellyn Elementary School is situated in the Moreland neighborhood of Southeast Portland. Aligned on a north south axis, the two-story school building is situated at the east side of the campus. In addition to the main school building, the campus has a portable classroom located at its northwest corner and covered play structure at the southeast end. The reinforced concrete building, faced with a pale brown brick, rests on a poured concrete foundation. A flat roof with a parapet covers the rectangular building. Designed with Mediterranean Revival style components, cast stone is utilized as architectural ornament throughout the exterior elevations. Fenestration consists of a mixture of grouped metal frame and wood frame windows.

Development in the surrounding neighborhood consists primarily of single family residences. Much of the neighborhood had been developed by the 1920s but the area continued to experience growth through the 1950s. Asphalt covered play areas are situated at the west and south sides of the building. Grass covered play fields are located at the south end of the campus.

Llewellyn Elementary School does not retain a level of historical significance and integrity commensurate with other Portland Elementary Schools constructed of similar styles during the same period and is therefore not eligible for the National Register of Historic Places.

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Llewellyn serves a less diverse student population with relatively low poverty levels compared to the district average.

- » For the 2021-22 school year, 16% of students are historically underserved, well below the K-5 school mean (34%).
- » For the 2021-22 school year, 7% of students qualified for free or reduced lunch, significantly less

than the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Llewellyn Elementary is forecast at 93% utilization. By the 2030-31 school year, utilization is projected to decrease to 88%.

FACILITY CONDITION SUMMARY

Llewellyn Elementary School is 93 years old, and in critical condition with a facility condition index (FCI) score of 0.4. As the average FCI score for K-5 schools in PPS is 0.18, the building is in significantly worse condition than most of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The remaining equipment was original to facility construction.
- The plumbing fixtures had no deficiencies observed. The domestic water piping and sanitary waste piping were not visible for assessment, but had no deficiencies reported.

Fire Protection

- The school had a wet pipe sprinkler system that served the entire building.
- The fire alarm control panel and alarm devices had no deficiencies observed.

Electrical

- The electrical distribution equipment had no deficiencies observed. Distribution branch wiring and grounding systems were not visible for assessment, but had no deficiencies reported.

Arch/Struct/Site

- Moderate cracking was occurring in the south exterior concrete wall.
- One roof hatch was tearing at its hinge. Moderate surface corrosion was present on both roof hatches.
- Multiple concrete exterior stairs had cracks or were crumbling or broken.
- The VCT in the cafeteria was coming loose in spots, with stress cracking in many of the tiles.
- The wood floor was delaminating throughout the cafeteria and gymnasiums.
- There was a major crack in the southwest retaining wall.

RECENT CAPITAL EXPENDITURES

- Restroom Door Replacements in 2018
- Select Flooring Replacements in 2018
- Drinking Fountain Fixture Replacements in 2021

EDUCATIONAL SUITABILITY

- Most classrooms are approximately 70% of size standard and do not support flexible learning.
- The music room is located in a portable classroom.
- The school does not have an art classroom.
- The gym is greatly undersized (54% of standard).
- Finishes are worn and dated.
- No nurse's office is present.
- There is no security vestibule at the main entry.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications. Music is currently held in a portable classroom.
- Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.

Moderate Priority

- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the District's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

MAPLEWOOD ELEMENTARY SCHOOL

ADDRESS
7452 SW 52ND AVE

CONSTRUCTION DATE
1948 (PRIMARY)

LEVELS
2

BLDG AREA
40,636 SF

SITE AREA
187,308 SF
4.3 ACRES

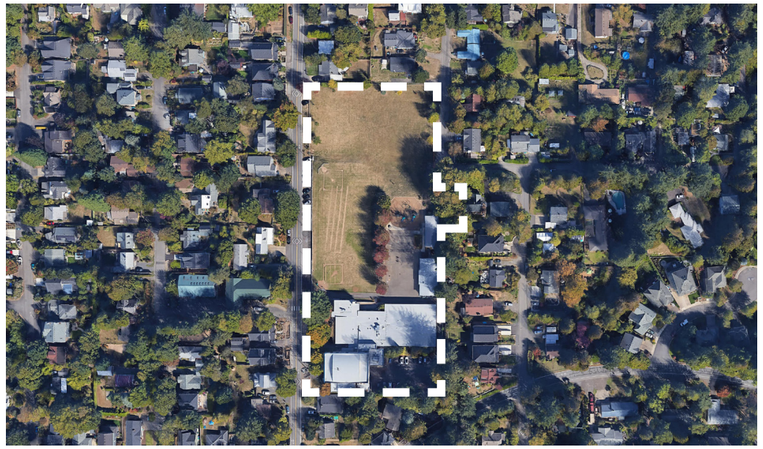
CLASSROOMS COUNT
21

FUNCTIONAL CAPACITY
467 STUDENTS

CLUSTER
WELLS-BARNETT

MODULAR CLASSROOMS
6

ZONING
R7 RESIDENTIAL 7,000 CU



HISTORICAL SUMMARY

Maplewood Elementary School is located in Southwest Portland. The campus consists of the primary school building built in 1945 with additional wings added in 1953 and 1954 and a detached portable classroom built in 1961. The school expresses a modest inspiration from the Streamline Moderne style and rests on a poured concrete foundation. Cladding on the wood frame building consists of a mixture of brick, glass block, horizontal board, concrete panels, and board and batten. With the exception of the barrel vault that covers the two story gymnasium wing, the mass of the single story school is covered by a flat roof. Fenestration consists of grouped metal frame windows.

Development in the neighborhood consists primarily of single family residences on large parcels of land built between 1950 and 2000. Asphalt covered parking and play areas surround the school buildings. Play fields occupy the northwest portion of the parcel.

Maplewood Elementary School lacks integrity due to the extensive and incompatible additions and alterations and resulting lack of coherent building vocabulary, therefore, it is not eligible for the NRHP.

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Maplewood serves a less diverse student population with relatively low poverty levels compared to the district average.

- For the 2021-22 school year, 13% of students are historically underserved well below the K-5 school mean (34%).
- For the 2021-22 school year, 10% of students qualified for free or reduced lunch, significantly less than the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Maplewood Elementary is forecast at 77% utilization. By the 2030-31 school year, utilization is projected to decrease to 72%.

FACILITY CONDITION SUMMARY

Maplewood Elementary School is 73 years old, and in poor condition with a facility condition index (FCI) score of 0.28. As the average FCI score for K-5 schools in PPS is 0.18, the building is in worse condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of domestic water equipment was replaced in 2019 and observed to be in good condition.
- The drains on the roof area above the elevator shaft were blocked by debris build-up which was causing ponding.
- The boiler was original to the facility but had been retrofitted with a gas burner within the past five years.

Fire Protection

- The fire protection system appeared to have been renovated around 2018 and was in good condition with no major deficiencies observed.

Electrical

- There were four distribution panels that were original to construction and had exceeded their typical design life. The remaining electrical distribution equipment was in good condition with no major deficiencies observed.

Arch/Struct/Site

- The site was experiencing poor drainage (especially at the paved play area) due to a broken drainage pipe or an obstruction. Hazard cones have to be set up to keep the students away from the affected areas. Some of the drainage inlets around the site were observed to be clogged with debris and grass.
- Portable 1 was observed to be in average to poor condition with aged and deteriorated interior finishes and aged exterior windows.
- A new portable building (Portable 3) was recently installed at the site in the summer of 2019.
- The exterior metal and wood windows were observed to be in poor condition. The frames were corroded, rotted, and deteriorated.
- The exterior glass block and Masonite panel walls were observed to be aged and deteriorated. Some of the glass blocks were cracked and the Masonite panels were chipped, cracked, and deteriorated at the south and west elevations near the gym.
- The roof hatches had deteriorated and corroding surfaces, worn seals, and broken and missing hardware.
- The attic access door had a missing latch, hardware that made it difficult to open the door, and weak springs that would allow the door to swing down freely causing a life safety hazard to a person trying to open the access door from the wall mounted ladder.
- The VCT in the office addition was heavily cracked throughout.
- The carpet throughout was heavily worn and had excessive staining in high traffic areas. Damaged carpet transitions to vinyl tile had been taped with duct tape causing a trip hazard.
- The painted concrete and sealed concrete surfaces throughout were heavily worn and had areas of wear showing bare concrete.
- The non-slip rubber sheet flooring on a corridor ramp was heavily worn down which decreased its slip resistance and caused a possible slip hazard.

RECENT CAPITAL EXPENDITURES

- Installation of Modular Classroom in 2019.
- Drinking Fountain Fixture Replacements in 2021.

EDUCATIONAL SUITABILITY

- There are limited spaces for small group instruction.
- The school lacks purposely designed special education spaces.
- The school lacks a dedicated music room.
- An undersized art room is provided; however, the space is poorly configured and not well-ventilated.
- The physical education space is a shared space with the auditorium and is located on the second floor of the school making access challenging. The space is undersized (77% of

space standard)
» The library / media center meets 62% of the required size standard..
» The basement-level cafeteria/ kitchen are undersized.
» There is no separation between vehicle, pedestrian, and bus traffic creating a significant safety hazard.
» There is no single controlled access point for entrance into the building.

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EDUCATIONAL PROGRAM FORECAST

High Priority

» Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
» Re-purpose space to create an art exhibition area.
» Security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
» Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.

Moderate Priority

» Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

MARKHAM ELEMENTARY SCHOOL

ADDRESS
10531 SW CAPITOL HWY

CONSTRUCTION DATE
1951 (PRIMARY)

LEVELS
1

BLDG AREA
79,714 SF

SITE AREA
399,881 SF
9.18 ACRES

CLASSROOMS COUNT
27

FUNCTIONAL CAPACITY
588 STUDENTS

CLUSTER
WELLS-BARNETT

MODULAR CLASSROOMS
0

ZONING
R2 RESIDENTIAL 2,000 CU
CM2 COMMERCIAL MIXED USE 2

HISTORICAL SUMMARY

Markham Elementary School is situated in a residential neighborhood of Southwest Portland. Built in 1951, the Colonial Revival style school building is situated on a mostly grass-covered campus which includes a grass-covered commons in front of the main entrance. The modified H-shaped building has a wood frame clad with red brick which sits on a poured concrete foundation. The single story building is covered by gable roofs. The school building houses classrooms, an auditorium, a gymnasium, a media center/library, a cafeteria, and an administrative office. Playfields are located at the rear and to the west of the school. An asphalt- covered half-circular driveway is located in front of the northeast wing (Cafeteria). Parking areas are situated at the southeast corner of the property off Capitol Way, and another at the rear of the school.

Markham Elementary School retains excellent integrity with its floor plan, cladding, fenestration, and many interior finishes intact. The school is recommended as eligible for the NRHP under Criterion A and C.

RESJ CONSIDERATIONS

Markham's student population is largely reflective of district-wide averages for K-5 schools:

» For the 2021-22 school year, 39% of students are historically underserved, slightly above the K-5 school mean (34%).
» For the 2020-21 school year, 31% of students qualified for free or reduced lunch, slightly below the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Markham Elementary is forecast at 73% utilization. By the 2030-31 school year, utilization is projected to increase slightly to 74%.

FACILITY CONDITION SUMMARY

Markham Elementary School is 70

years old, and in poor condition with a facility condition index (FCI) score of 0.19. As the average FCI score for K-5 schools in PPS is 0.18, the building is in slightly worse condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the plumbing fixtures had exceeded typical design life.
- The domestic water piping and sanitary waste piping was assumed to be original and assumed to have exceeded typical design life.
- One of the water heaters had exceeded typical design life.
- The ventilation exhaust fans/ supply fans had exceeded typical design life.
- The classroom ventilators and heaters had exceeded typical design life.
- The pneumatic controls and associated air compressor had exceeded typical design life.

Fire Protection

- The fire alarm control panel and alarm devices were in good condition and had no deficiencies observed.
- The fire suppression system had exceeded its design life.

Electrical

- The main distribution switchgear and 18 of the distribution panels had exceeded typical design life.
- The interior lighting was approaching the end of typical design life.

Arch/Struct/Site

- Recommend review of the asphalt hard surface play area. The uneven surface presents trip hazards for the frequently used play area.
- The roof was observed with organic growth and there was evidence of leaks. The roof was nearing the end of design life.
- The wood windows and exterior doors were damaged and beyond typical design life.
- The majority of interior architectural components had exceeded design life.
- The asphalt at the north side of the play fields was damaged by tree roots. It was reported that the tree roots also impacted drainage and underground piping.

RECENT CAPITAL EXPENDITURES

- ADA Upgrades (Restrooms) in 2018
- Replacement of Boiler Condensate Tank in 2018
- Asphalt Replacement at Play Areas in 2019
- Stormwater Upgrades in 2018
- Fire Alarm Upgrades in 2020
- Drinking Fountain Fixture Replacements in 2021

EDUCATIONAL SUITABILITY

- The ECE room meets approximately 75% of the size standard. There is no in-room restroom.
- There are two rooms used for special education. One is a small general classroom that meets approximately 72% of the size standard. There are two restrooms with electric lift tables for changing, but only one of them is located near these two classrooms.
- The art room is large and cavernous and the single sink is located distant from the instructional area.
- There is a main gym that meets approximately 85% of the size standard, as well as a smaller gym.
- An auditorium with stage is present.
- A dedicated music room is present.
- A long, narrow library media center is present.
- The cafeteria is adequately sized; however, the food prep area is undersized.
- There is no security vestibule or active supervision of the entrances.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Re-purpose space to provide two (2) appropriately sized and designed pre-k classrooms to support the needs of early learners.
- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.

Moderate Priority

- Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

MARYSVILLE ELEMENTARY SCHOOL

ADDRESS
7733 SE RAYMOND ST

CONSTRUCTION DATE
1921 (PRIMARY)

LEVELS
1

BLDG AREA
52,724 SF

SITE AREA
226,512 SF
5.2 ACRES

CLASSROOMS COUNT
26

FUNCTIONAL CAPACITY
533 STUDENTS

CLUSTER
FRANKLIN

MODULAR CLASSROOMS
0

ZONING
R2.5 RESIDENTIAL 2,500 CU

HISTORICAL SUMMARY

Marysville Elementary School is situated in the Foster-Powell neighborhood of Southeast Portland. The school facility, oriented on an east-west axis, consists of a U-shaped building that surrounds a central courtyard. The single story building rests on a poured concrete foundation. The wings that comprise the Colonial Revival style building are covered with hipped roofs. Cladding consists of horizontal vinyl siding. Fenestration consists primarily of groups of eight-over-twelve triple hung wood windows. The centrally located entry to the school is emphasized by an open bed pediment portico supported by four Tuscan columns. A cupola caps the south wing. Additional entries are located beneath more modest open bed pediment entries flanked by paired Tuscan columns.

The neighborhood is comprised of primarily single family residences built between 1900-1950. The primary entrance to the school is from the south on SE Raymond Street. Grass and asphalt covered play areas occupy the north portion of the parcel.

The 1922 Colonial Revival school building is recommended as eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Marysville Elementary School has multiple attributes that place it in a high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals.

- For the 2021-22 school year, 43% of students are historically underserved, greater than the K-5 school mean (34%).
- For the 2020-21 school year, 45% of students qualified for free or reduced lunch, well above the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Marysville Elementary is forecast at 51% utilization. By the 2030-31 school year, utilization is projected to decrease to 48%.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Marysville Elementary School is 100 years old, and in poor condition with a facility condition index (FCI) score of 0.19. As the average FCI score for K-5 schools in PPS is 0.18, the building is in slightly worse condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The water heater serving the kitchen and the water heater serving the building had both exceeded their typical design lives.
- One of the two boilers was original to the facility but had been retrofitted with a gas burner.
- The unit ventilators on the west side of the facility were replaced in 2012 due to a fire.

Fire Protection

- A fire suppression system serving the entire building was installed 2012.

Electrical

- The site's service entrance equipment and the majority of the electrical system's interior distribution was replaced in 2013. However, ten distribution panels located throughout the facility were observed to have exceeded their typical design lives.

Arch/Struct/Site

- Many of the exterior concrete steps were observed to be cracked or crumbling.
- The historic wooden window frames, wood trim, and wood exterior doors had cracking paint. The exterior windows and doors had exceeded their typical design lives.
- Though the east half of the school was rebuilt after a fire, many of the interior finishes in the west half had exceeded their typical design lives.
- The exterior brick around the boiler room was heavily weathered with many chipped bricks.

RECENT CAPITAL EXPENDITURES

- ADA Access Upgrades (Exterior Doors) in 2017
- Radon Mitigation in 2018-19
- Replacement of Boiler Condensate Tank in 2018
- Gym Soundproofing in 2019
- Stair Replacement in 2020
- Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

- Classrooms are generally undersized (68-83% of size standard).
- Kindergarten classrooms lack dedicated, adjacent restrooms.
- Two (2) undersized SPED classrooms are present. One of the SPED classrooms is located next to the gym and experiences a high level of noise transference. The SPED rooms do not have adjacent, dedicated ADA restrooms or a changing table.
- There is no dedicated music room.
- A small art room (67% of size standard) is present, but is partially carpeted. The kiln is positioned in an outdoor storage shed.
- The gym is severely undersized (33% of size standard) with poor acoustics.
- A small multipurpose room and stage are provided.
- The library media center is a converted gym space with an awkward layout.
- There is no buzzer or other active control of the main entrance.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Evaluate Marysville as a possible candidate for adding or repurposing space to provide two (2) appropriately sized and designed pre-k classrooms to support the needs of early learners in southeast Portland.
- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including

new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
» Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.

Moderate Priority

» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

MLK JR ELEMENTARY SCHOOL

ADDRESS
4906 NE 6TH AVE

CONSTRUCTION DATE
1925 (PRIMARY)

LEVELS
2

BLDG AREA
108,598 SF

SITE AREA
213,880 SF
4.91 ACRES

CLASSROOMS COUNT
35

FUNCTIONAL CAPACITY
635 STUDENTS

CLUSTER
JEFFERSON

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU
OS OPEN SPACE CU

HISTORICAL SUMMARY

Situated in the King neighborhood of Northeast Portland, MLK Jr. Elementary School was constructed over three distinct periods. The original 1926 section, consisting of the northernmost part of the building, rises two stories. It is a reinforced concrete building, faced with red brick that rests on a poured concrete foundation. A flat roof is concealed behind a parapet that exhibits widely spaced crenels and terra cotta coping. The 1926 building conveys its Collegiate Gothic style through the strategic use of cast stone architectural ornamentation at critical parts of the building.

The 1952 one and two story wing to the south is also constructed of concrete with red brick facing, but is largely stripped of architectural elaboration. The entrances are recessed into the building and are emphasized by the use of plain concrete. Fenestration consists primarily of grouped metal frame windows set in the original wood surrounds. The 1976 addition is also constructed of red brick but reflects the influences of Brutalism in its asymmetrical fenestration and angular roof forms.

The school does not retain a level of historical integrity commensurate with other Portland Elementary Schools constructed of similar styles during the same period and is therefore not eligible for the National Register of Historic Places. While the Collegiate Gothic style is clearly discernible on the building, several alterations have diminished the building's integrity of materials, design, and feeling. These alterations include the removal of windows, prominent addition on the south elevation, construction of the Neighborhood facility at the south end of the property, extensive interior modifications that have blurred the original corridor plan and altered major spaces that included the original auditorium. Due to the loss of integrity, Martin Luther King Jr. Elementary School is not eligible under NRHP Criteria A, B, or C.

RESJ CONSIDERATIONS

MLK Jr. Elementary School has multiple attributes that place it in a high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals.

- For the 2021-22 school year, 61% of students are historically underserved, significantly greater than the K-5 school mean (34%).
- For the 2020-21 school year, 45% of students qualified for free or reduced lunch, significantly more than the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, MLK Jr. Elementary is forecast at 54% utilization. By the 2030-31 school year, utilization is projected to increase to 56%.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

MLK Jr. Elementary School is 96 years old, and in fair condition with a facility condition index (FCI) score of 0.09. As the average FCI score for K-5 schools in PPS is 0.18, the building is in better condition than most of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the HVAC system had exceeded its typical design life. The facility's three boilers were aged; however, their burners were retrofitted to natural gas in 2012. The condensate pump package and boiler feed water package were both corroded and had signs of leaks. The classrooms in the main facility had unit ventilators, while classrooms in the south addition and other areas throughout the buildings were heated via fin tube radiators and air handling units. The NBRHD facility had an air handling unit with a heating coil and a new rooftop package unit conditioning the facility.
- An elevator was installed in the facility in 2018. The elevator served three floors and had no major deficiencies.
- The facility had two water heaters located in Room 1. Both water heaters were installed in 2018. The NBRHD facility had an electric water heater located in the mechanical room that had exceeded its typical design life.
- Plumbing fixtures were aged but operational. The majority of the water closet flush valves had been updated with dual-flush handles. A water cooler in this facility had signage stating that a lead hazard was present.

Fire Protection

- The fire alarm control panel and fire alarm devices had recently been replaced and did not have any major deficiencies observed or reported.
- The main facility, south addition, and NBRHD facility were all protected by a wet pipe sprinkler system. There were no major deficiencies observed or reported.

Electrical

- The majority of the electrical distribution system, including the main switchboard, had exceeded its typical design life. The panels supporting the IT systems were installed in 1997. The majority of the interior lighting was much newer than the distribution equipment, but had exceeded its typical design life.

Arch/Struct/Site

- The roof was installed in 2018, however, there were known issues and water leaks.
- There were interior water leaks in the NBRHD facility. Staff reported some of the roof drains were backing up.
- There were leaks in the boiler room and adjacent storage room.
- The kitchen flooring was beyond its typical design life. Staff reported the floor would be refinished over the holidays.

RECENT CAPITAL EXPENDITURES

- Wireless Upgrades in 2019
- Drinking Fountain Fixture Upgrades in 2021

EDUCATIONAL SUITABILITY

- This school has been renovated to create flexible learning and working spaces adjacent to general classrooms.
- Classrooms are undersized (approximately 71% of size standard) and many open to adjoining spaces that are used for flexible grouping, acoustic separation is inadequate.
- The school lacks purposely designed special education spaces.
- While the school does have a dedicated science lab, it has neither an art classroom nor a music room.
- The school has a small gym (75% of standard) and a separate dance room.
- A cafeteria with a small stage is provided.
- The library media center is located in a converted auditorium; the space is poorly configured.
- There is no buzzer or camera at the main entry and the office is located across the corridor, providing no active control of the entrance.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Re-purpose space to provide two (2) appropriately sized and designed pre-k classrooms to support the needs of early learners.
- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.
- Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.

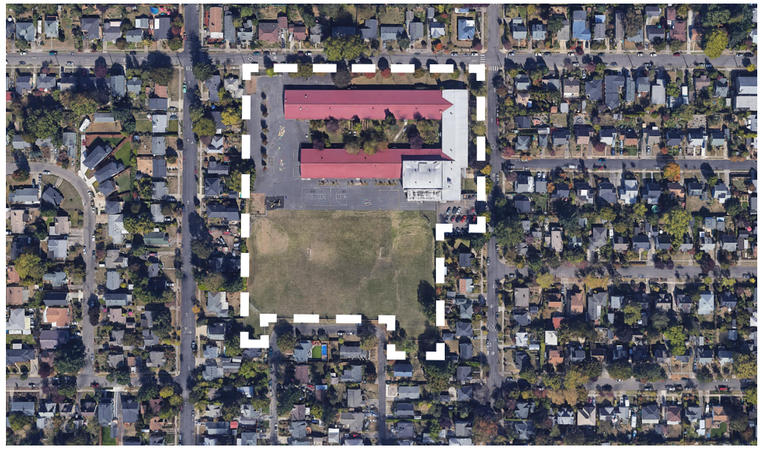
Moderate Priority

- Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

PENINSULA ELEMENTARY SCHOOL



ADDRESS
8125 N EMERALD AVE

CONSTRUCTION DATE
1952 (PRIMARY)

LEVELS
1

BLDG AREA
62,231 SF

SITE AREA
293,159 SF
6.73 ACRES

CLASSROOMS COUNT
29

FUNCTIONAL CAPACITY
613 STUDENTS

CLUSTER
MCDANIEL

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

The Peninsula Elementary School is a one story brick veneer building designed in the International style. The campus consists of a 1952 single story brick-faced building that forms a U-shaped plan. The wings that make up the U-shaped plan are separated by a courtyard and form a variation on a finger plan type school. The building features International style elements such as a linear composition, bands of aluminum windows, flat roofs, overhangs, and a lack of ornamentation. These elements serve to reinforce the ideals of functionalism and minimalism.

Peninsula Elementary School is situated in the Portsmouth neighborhood of North Portland. The campus occupies a rectangular parcel between N Emerald Avenue on the east, N Halleck Street on the north, and single family residences on the south and west. The school is located on the north end of the campus, play grounds surround the south and east sides of the building, and play fields are located on the south end of the campus.

Peninsula Elementary School retains excellent integrity of location, design, setting, materials, workmanship, feeling, and association with its plan and exterior and interior finishes. The 1952 International style influenced school is recommended as eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Peninsula Elementary School has attributes that place it in a moderately high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals.

- For the 2021-22 school year, 44% of students are historically underserved, slightly above the K-5 school mean (34%).
- For the 2020-21 school year, 27% of students qualified for free or reduced lunch; this is greater than the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Peninsula Elementary is forecast at 45% utilization. By the 2030-31 school year, utilization is projected to decrease to 42%.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Peninsula Elementary School is 69 years old, and in fair condition with a facility condition index (FCI) score of 0.09. As the average FCI score for K-5 schools in PPS is 0.18, the building is in better condition than most of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the plumbing fixtures were aged, but operational. The majority of the water closet flush valves had been updated with dual-flush handles.
- The main facility's boilers were original to the facility but had been retrofitted with gas burners in 2012.
- Four PACE ventilation units and four supply fans were observed in the attic space. All units had exceeded their typical design lives.
- The vacuum pump in Room 131 was discharging excessive water and was heavily corroded.

Fire Protection

- The fire alarm control panel and fire alarm devices had been recently replaced and did not have any major deficiencies observed or reported.
- The facility did not have a fire suppression system.

Electrical

- While several panel boards were recently installed or replaced, including the 1000 amp main distribution panel and several panels supporting the IT equipment, the majority of the electrical distribution equipment was original to the 1953 building construction and was antiquated.
- The exterior lighting had been upgraded to LED or CFL fixtures, but the majority of the interior lighting had exceeded its typical design life.

Arch/Struct/Site

- The gymnasium roof structure had failed and was recently repaired.
- The gymnasium walls and ACT had water damage and were delaminated.
- There was evidence of water intrusion and deterioration of attic insulation.
- The roof was aged and had exceeded its design life.

RECENT CAPITAL EXPENDITURES

- Radon Mitigation in 2017-18
- Emergency Generator Replacement in 2018
- Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

- A number of regular classrooms have been converted to space that can be used for multiple learning styles.
- Four regular classrooms are used for special education programs (undersized for SPED with no specialized features).
- Music is held in a traditional general classroom that is undersized for music with poor acoustics.
- Art is held in a general classroom without storage, casework, or equipment needed for effective art instruction.
- The multipurpose room is equipped with a stage.
- The library media center is located in a repurposed space that was formerly two general classrooms.
- The gym is undersized (75% of standard).
- The cafeteria is adequately sized; however, the kitchen is small.
- No entry vestibule is present at the main entry.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including

new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
» Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications. Music is currently held in a general classroom.
» Facilities upgrades to general classroom currently used for art to create a space configured and equipped for visual arts, per current Ed Specifications, with a working, properly ventilated kiln. Art instruction currently occurs in a general classroom.

Moderate Priority

» Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

RICHMOND ELEMENTARY SCHOOL

ADDRESS
2276 SE 41ST AVE

CONSTRUCTION DATE
1908 (PRIMARY)

LEVELS
3

BLDG AREA
79,894 SF

SITE AREA
166,399 SF
3.82 ACRES

CLASSROOMS COUNT
30

FUNCTIONAL CAPACITY
723 STUDENTS

CLUSTER
FRANKLIN

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

The Richmond School is situated in the Richmond neighborhood of Southeast Portland. The campus includes a two-story school building with a basement. Built in 1908, the building originally featured Classical Revival detailing, but all of these architectural embellishments were covered by a subsequent veneer of yellow brick. The building retains its interconnecting hip and gable roofs. The building's irregular shaped plan includes classrooms, a multi-purpose room, a gymnasium, a library, and an administrative office.

The Richmond School, which faces SE 41st Avenue, is situated on a grass-covered and asphalt campus with playgrounds and ball fields located to the south of the school. The primary entrance to the building is on SE 41st Avenue. The parking area occupies the north side of the building.

Although designed by Thomas Jones, the first district architect for Portland Schools, Richmond School does not retain a level of historical integrity commensurate with other schools constructed during the early twentieth century and is therefore not eligible for the National Register of Historic Places.

RESJ CONSIDERATIONS

While Richmond serves a fairly diverse student population, student poverty levels are among the lowest of district's elementary schools.

» For the 2021-22 school year, 10% of students are historically underserved; this is greater than the K-5 school mean (34%).
» For the 2021-22 school year, 4% of students qualified for free or reduced lunch; this is far below the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Richmond Elementary is forecast at 84% utilization. By the 2030-31 school year, utilization is projected to decrease slightly to 83%.

FACILITY CONDITION SUMMARY

Richmond Elementary School is 113 years old, and in poor condition with a facility condition index (FCI) score of 0.2. As the average FCI score for K-5 schools in PPS is 0.18, the building is in worse condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The domestic water distribution equipment was approaching the end if its typical design life.
» Most of the HVAC equipment was replaced during the 1953 cafetorium addition and had exceeded its typical design life.

Fire Protection

» A wet pipe sprinkler system served the entire building.

Electrical

» The site's service entrance equipment and a portion of the electrical system's interior distribution was replaced in 1998. However, a portion of the system including distribution panels, transformers, and lighting throughout the facility had exceeded their typical design lives.

Arch/Struct/Site

» Many of the acoustic ceiling tiles were patched, loose, missing, or stained.
» The majority of the interior finishes were beyond their design lives including loose vinyl tile floor and wall coverings and stained ceiling tiles.
» Many of the shingles on the pitched roof were sagging or had detached and slid down the roof.
» The interior vinyl tile wall finish in the annex was loose or missing in a few areas.
» The exterior brick wall was heavily weathered in spots, with deep grooves in the mortar joints, or brick faces worn down to the mortar.

RECENT CAPITAL EXPENDITURES

» Select Flooring Replacements in 2018
» Roof Repairs in 2018
» Fire Alarm Upgrades in 2020

EDUCATIONAL SUITABILITY

» The school has some small spaces to accommodate differentiated learning or different grouping patterns. Eight general classrooms have small anterooms that provide limited space for small groups to work.
» The school lacks purposely designed special education spaces.
» No music room is present.
» The small art room is long, narrow, and poorly configured. The kiln is in a separate room.
» A large P.E. activity space is provided, but has poor acoustics.
» The cafegymatorium has a small stage.
» The main entrance is not locked and has no buzzer/camera or security vestibule and is not under active supervision from the office which is located a floor above the doors.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
» Re-purpose space to create an art exhibition area.
» Security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
» Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.

Moderate Priority

» Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

RIEKE ELEMENTARY SCHOOL

ADDRESS
1405 SW VERMONT ST

CONSTRUCTION DATE
1961 (PRIMARY)

LEVELS
1

BLDG AREA
34,272 SF

SITE AREA
550,163 SF
12.63 ACRES

CLASSROOMS COUNT
20

FUNCTIONAL CAPACITY
492 STUDENTS

CLUSTER
WELLS-BARNETT

MODULAR CLASSROOMS
6

ZONING
CM2 COMMERCIAL MIXED USE 2
R7 RESIDENTIAL 7,000 CU
OS OPEN SPACE CU

HISTORICAL SUMMARY

Rieke Elementary School is located in the Hillsdale neighborhood of Southwest Portland. The property includes the main school building, a multi-purpose building (1968), a playshed (1977), and a portable (2007). The one story building reflects International style influences through its horizontal appearance, glazed curtain walls, low sloping butterfly roof, and wide overhanging eaves.

The campus is bounded by the Ida B Wells (formerly Wilson) High School property to the east, Vermont St. to the south, SW Bertha Blvd. to the west, and commercial strip development to the north. The school occupies the south side of the lot along Vermont St. and is well shaded by trees to the south. Development in the surrounding area consists primarily of single family residences built between 1950 and 1990. Playing fields are largely located to the north of the school. Although the Rieke School retains its integrity with its floor plan and many of the exterior and interior finishes intact, it is not recommended as eligible for the NRHP.

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Rieke serves a less diverse student population with relatively low poverty levels compared to the district average.

- For the 2021-22 school year, 15% of students are historically underserved, significantly below the K-5 school mean (34%).
- For the 2021-22 school year, 6% of students qualified for free or reduced lunch, significantly below the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Rieke Elementary is forecast at 74% utilization. By the 2030-31 school year, utilization is projected to decrease to 68%.

FACILITY CONDITION SUMMARY

Rieke Elementary School is 60 years old, and in poor condition with a facility condition index (FCI) score of 0.17. As the average FCI score for K-5 schools in PPS is 0.18, the building condition is in slightly worse condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the plumbing fixtures had exceeded typical design life.
- The domestic water piping and sanitary waste piping was assumed to be original and had assumed to have exceeded typical design life.
- The water heater and both boilers had exceeded typical design life.
- The air handling units had exceeded typical design life.
- The classroom ventilators and heaters had exceeded typical design life.
- The pneumatic controls and associated air compressor had exceeded typical design life.

Fire Protection

- The fire alarm control panel and alarm devices were in good condition and had no deficiencies observed.
- There was no sprinkler system observed.

Electrical

- The main distribution switchgear and eight of the distribution panels had exceeded typical design life.
- The interior lighting was approaching the end of typical design life.
- The natural gas generator and associated automatic transfer switch had exceeded typical design life.

Arch/Struct/Site

- The main building had evidence of roof leaks.
- The north addition soffit was damaged.
- The carpeting in Portable 1 had exceeded design life.
- The wood canopy at the covered play area was aged beyond typical design life. The paint was weathered and there were areas of isolated damage.
- The asphalt drive and parking lot had large areas of alligator cracking.

RECENT CAPITAL EXPENDITURES

- ADA Upgrades in 2018-19
- Gym Flooring Replacement in 2019
- Installation of Gym Climbing Wall in 2019
- Playground Drainage Improvements in 2019
- Drinking Fountain Fixture Replacements in 2021
- Roof Replacement in 2021

EDUCATIONAL SUITABILITY

- The school lacks purposely designed special education spaces.
- No dedicated music room is present.
- A small art room is provided (78% of standard).
- A small cafegymatorium is present, limiting use of the space.
- No performing arts space or stage is provided at this school.
- The library media center is undersized (72% of standard) with poor acoustics.
- This school is on a high traffic street with no fencing between school building and road.
- The main entry lacks a secure vestibule; remote control of doors from the office is not provided.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Add or re-purpose space for a structured movement room (2,000 SF) to support P.E. instruction. If space for a structured movement area is unavailable, construct an additional covered play structure.
- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force,

including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
» Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.

Moderate Priority

» Construct a new gymnasium.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

RIGLER ELEMENTARY SCHOOL

ADDRESS
5401 NE PRESCOTT ST

CONSTRUCTION DATE
1931 (PRIMARY)

LEVELS
3

BLDG AREA
69,143 SF

SITE AREA
382,021 SF
8.77 ACRES

CLASSROOMS COUNT
30

FUNCTIONAL CAPACITY
589 STUDENTS

CLUSTER
MCDANIEL

MODULAR CLASSROOMS
8

ZONING
R7 RESIDENTIAL 7,000 CU

HISTORICAL SUMMARY

Situated in the primarily single family residential neighborhood of Northeast Portland, the Rigler Elementary School is located on a campus that consists of a multi-story school building and four detached portable/modular classrooms. Built in 1931, the Mediterranean Revival style building with minor Art Deco influences and a pantile roof is a reinforced concrete structure with brick veneer and cast stone ornamentation. The building's modified L-shaped plan includes classrooms, a library, an auditorium, a gymnasium, a cafeteria, and an administrative office.

The school faces NE Prescott Street and is situated on a grass-covered and asphalt campus with play fields, a play shed, and playgrounds north and west of the school. During the mid-1950s, a one story brick addition was constructed onto the rear (east wing) of the building. The school's parking area is located to the southwest of the main building. Rigler School retains its integrity with minimal alterations to its plan and exterior and interior finishes. The 1931 school is recommended as eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Rigler Elementary School has multiple attributes that place it in a high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals..

» For the 2021-22 school year, 81% of students are historically underserved, significantly above the K-5 school mean (34%).
» For the 2020-21 school year, 46% of students qualified for free or reduced lunch, more than double the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Rigler Elementary is forecast at 47% utilization. By the 2030-31 school year, utilization is projected to decrease to 45%.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Rigler Elementary School is 90 years old, and in poor condition with a facility condition index (FCI) score of 0.14. As the average FCI score for K-5 schools in PPS is 0.18, the building is in slightly better condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the plumbing fixtures were aged but operational. The majority of the water closet flush valves had been updated with dual-flush handles.
- The main facility's boilers were original to the facility but had been retrofitted with gas burners in 2006.
- All unit ventilators in the classrooms and air handling units throughout the facility had exceeded their typical design lives.
- All rooftop exhaust fans had been replaced during the roof renovation in the summer of 2019.
- Facility staff reported issues with the steam piping serving the portable units.
- Both thru-wall heat pumps at Portable 5 used R-22 refrigerant.
- Construction was underway on a new passenger elevator for the main facility.

Fire Protection

- The fire alarm control panel and fire alarm devices had been recently replaced and did not have any major deficiencies observed or reported.
- The facility did not have a fire suppression system.

Electrical

- The main distribution panel and the majority of the remaining distribution panels were installed around 1970 and had exceeded their typical design life. The remaining electrical distribution equipment was more recently installed or replaced.
- The majority of the exterior lighting had been upgraded to LED fixtures; however, staff reported that the exterior lighting was not sufficient. The exterior CFL fixtures and the majority of the interior lighting had exceeded it typical design life and needs replacement.

Arch/Struct/Site

- The roofs of the main school and portables were replaced in 2019.
- Staff reported the portables flooring was rotted from steam piping.

RECENT CAPITAL EXPENDITURES

- Asbestos Remediation in 2020
- Seismic Strengthened Roof in 2019
- Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

- General classrooms vary in size. Most rooms meet approximately 75% of the size standard.
- The school lacks purposely designed special education spaces.
- No dedicated music room is present.
- The art room is partially carpeted. The kiln is located down 2 flights of stairs in the boiler room.
- The gym meets approximately 50% of the size standard and has poor acoustics.
- A large auditorium is provided with a small stage area.
- The cafeteria is large enough for the enrollment, but has several large columns located in the space that limit seating arrangements. The kitchen is undersized.
- The main entrance lacks a buzzer or camera and the door is kept unlocked. The office has a view of the main door, but no active control of the entrance.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.

Moderate Priority

- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

ROSA PARKS ELEMENTARY SCHOOL

ADDRESS
8960 N WOOLSEY AVE

CONSTRUCTION DATE
2006 (PRIMARY)

LEVELS
2

BLDG AREA
68,176 SF

SITE AREA
117,612 SF
2.7 ACRES

CLASSROOMS COUNT
26

FUNCTIONAL CAPACITY
594 STUDENTS

CLUSTER
ROOSEVELT

MODULAR CLASSROOMS
0

ZONING
R2 RESIDENTIAL 2,000 CU
CM2 COMMERCIAL MIXED USE 2

HISTORICAL SUMMARY

Rosa Parks Elementary School was constructed in 2006 and does not have significant history.

RESJ CONSIDERATIONS

Rosa Parks Elementary School has multiple attributes that place it in a high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals.

- For the 2021-22 school year, 86% of students are historically underserved; this is significantly above the K-5 school mean (34%).
- For the 2021-22 school year, 65% of students qualified for free or reduced lunch, the highest of any elementary school in the district and significantly above the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Rosa Parks Elementary is forecast at 46% utilization. By the 2030-31 school year, utilization is projected to decrease to 38%.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Rosa Parks Elementary School is 15 years old, and in good condition with a facility condition index (FCI) score of 0.01. As the average FCI score for K-5 schools in PPS is 0.18, the building is in significantly better condition than other elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- One of the condensing units for the kitchen refrigeration equipment had ice buildup on its refrigerant piping indicative of low refrigerant levels.
- Two rooftop exhaust fans, EF-2 and EF-6, made excessive noise at the time of assessment indicating an alignment issue or failing bearings
- The domestic water heaters at this facility had exceeded their typical design life and were in need of replacement. The remaining assets within the plumbing system were installed in 2006 during building construction and had no major deficiencies.

Fire Protection

- The fire alarm control panel and fire alarm devices had been recently replaced and had no major deficiencies observed or reported.
- There was a wet pipe sprinkler system observed throughout the entire facility. No deficiencies were observed or reported with the system.

Electrical

- The electrical distribution was original to building construction in 2006 and had no major deficiencies observed or reported. The majority of the lighting at this facility had been recently updated to LED.

Arch/Struct/Site

- The CMU wall at the trash bin area had signs of efflorescence.
- There was an area of sidewalk at the northeast elevation that was displaced.

RECENT CAPITAL EXPENDITURES

- Select Carpet Replacements in 2018
- Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

- The school lacks purposely designed special education spaces.
- A separate art room is provided with access to an outdoor patio. It is slightly undersized (78% of standard).
- A dedicated music room is present.
- There is no fixed-platform performing arts space at the school.
- The cafeteria is appropriately sized for the student population.
- The main office has a camera/buzzer to open the main entrance, but has no active supervision/control over the door.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.

Moderate Priority

- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

ROSE CITY PARK ELEMENTARY SCHOOL

ADDRESS
2334 NE 57TH AVE

CONSTRUCTION DATE
1912 (PRIMARY)

LEVELS
3

BLDG AREA
73,719 SF

SITE AREA
161,172 SF
3.7 ACRES

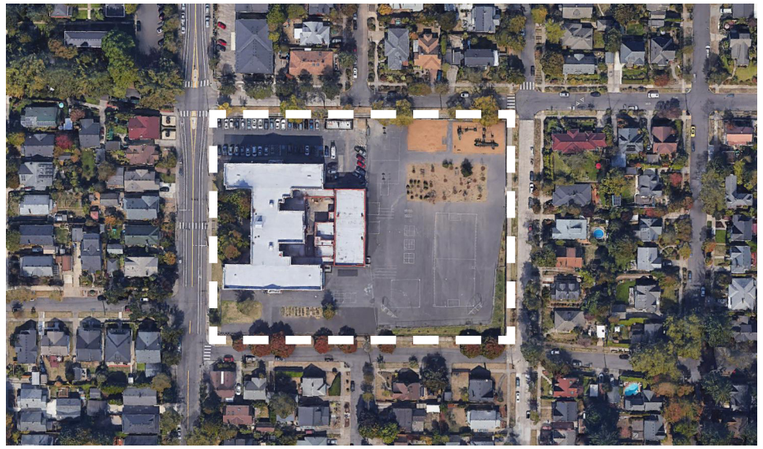
CLASSROOMS COUNT
28

FUNCTIONAL CAPACITY
636 STUDENTS

CLUSTER
MCDANIEL

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU



HISTORICAL SUMMARY

Rose City Park Elementary School is located in Northeast Portland. The campus includes a primary, multi-story building surrounded by asphalt covered parking and play areas. The red brick building is covered by a flat roof. The irregular shaped mass of the building rests on a poured concrete foundation. The fenestration consists of a mixture of original wood frame and grouped metal frame windows. Designed in the Collegiate Gothic style, the school features glazed terra cotta coping, belt cornice, cartouches, window surrounds, and a cap for the poured concrete water table. Four-centered arches cap the entries to the building.

The primary school building is situated at the west end of a rectangular parcel. Development in the surrounding area consists primarily of single family residences built between 1900 and 1950. An asphalt parking area is located at the north end of the parcel.

Despite the alterations to the school, Rose City Park School is an important historic resource in the city of Portland that is eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Rose City Park's student population is largely reflective of district-wide averages for K-5 schools:

- For the 2021-22 school year, 16% of students are historically underserved, slightly less than the K-5 school mean (34%).
- For the 2021-22 school year, 17% of students qualified for free or reduced lunch; this is below the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Rose City Park Elementary is forecast at 89% utilization. By the 2030-31 school year, utilization is projected to decrease to 78%.

FACILITY CONDITION SUMMARY

Rose City Park Elementary School is 109 years old, and in poor condition with a facility condition index (FCI) score of 0.12. As the average FCI score for K-5 schools in PPS is 0.18, the building is in better condition than most of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the plumbing fixtures had exceeded their typical design lives. The domestic water distribution equipment had no major deficiencies.
- The vast majority of the heating and cooling equipment, exhaust fans, and associated equipment had exceeded their design lives.

Fire Protection

- An addressable fire alarm system headend (Potter PFC-6800) and associated detection and signal devices were installed in 2019.
- The building was partially sprinkled.

Electrical

- The building's 208Y/120V main electrical switchboard was last upgraded in 1977, and had exceeded its typical design life. Most of the panel boards had exceeded their design lives as well, with some dating before 1977. A sub-distribution panel board (SDP-IT) had been added in 1997 as part of a telecommunications upgrade, along with three subfed panel boards (E, IT1, and IT2).

Arch/Struct/Site

- The roof hatch had exceeded typical design life and had a degraded surface finish, weak springs, and rusted hardware.
- The original skylight had exceeded typical design life and had corroded frames and missing flashing.

RECENT CAPITAL EXPENDITURES

- ADA Upgrades in 2017
- Wireless Upgrades in 2018
- Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

- Rose City Park Elementary does include some flexible areas to support collaboration and differentiated instruction.
- General classrooms are undersized (70% of size standard), particularly kindergarten classrooms (60% of size standard).
- The school lacks purposely designed special education spaces.
- An undersized (65% of size standard) music room is provided, though it provides a poor environment for music instruction.
- No art room is present.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.

Moderate Priority

- Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
- Re-purpose an existing space into a wellness room.

- » Allocate an area for a Reconnection Services office.
- » Renovate the main entry to align with the District's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- » Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- » Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- » Expand P.E. storage by repurposing space and/or adding casework.
- » Allocate instructional, office, and meeting space for Virtual Scholars.

SABIN ELEMENTARY SCHOOL

ADDRESS
4013 NE 18TH AVE

CONSTRUCTION DATE
1928 (PRIMARY)

LEVELS
3

BLDG AREA
65,769 SF

SITE AREA
158,123 SF
3.63 ACRES

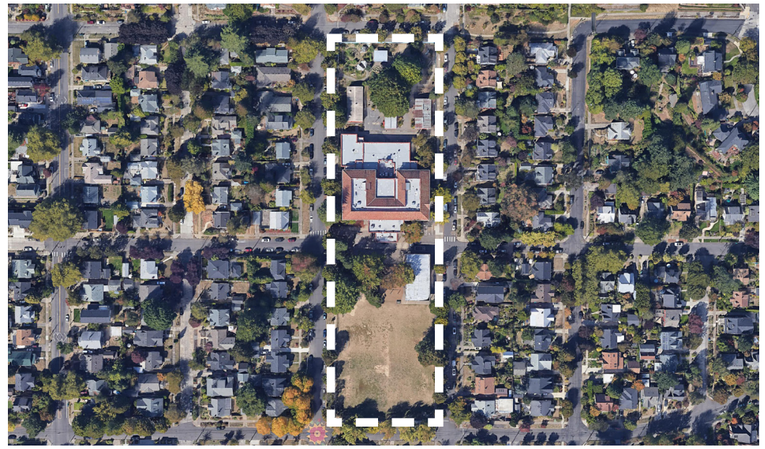
CLASSROOMS COUNT
31

FUNCTIONAL CAPACITY
610 STUDENTS

CLUSTER
JEFFERSON

MODULAR CLASSROOMS
4

ZONING
R5 RESIDENTIAL 5,000 CU



HISTORICAL SUMMARY

Sabin Elementary School is situated in the Sabin neighborhood of northeast Portland. The campus consists of a primary school building, three portables, and a covered play structure. The reinforced concrete structure, faced with red brick, rests on a poured concrete foundation. Red pantiles cover the hipped roof. Designed in the Mediterranean Revival style, cast stone belt course, quoins, and cartouches divide the building horizontally and embellish significant architectural spaces. Fenestration consists primarily of grouped, metal frame windows and some original multi-light wood frame windows.

Development in the surrounding neighborhood consists primarily of single family residence built between 1900-1950. The campus consists of a primary school building, three portables, and a covered play structure. The north and south portions of the campus are utilized for play areas.

Due to the loss of integrity, Sabin Elementary School is not eligible under either NRHP Criteria A, B, or C.

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Sabin serves a less diverse student population with relatively low poverty levels compared to the district average.

- » For the 2021-22 school year, 29% of students are historically underserved, well below the K-5 school mean (34%).
- » For the 2020-21 school year, 18% of students qualified for free or reduced lunch, significantly less than the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Sabin Elementary is forecast at 60% utilization. Utilization is projected to remain steady over the next several years, staying at 60% in 2030-31.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Sabin Elementary School is 93 years old, and in fair condition with a facility condition index (FCI) score of 0.08. As the average FCI score for K-5 schools in PPS is 0.18, the building is in much better condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the HVAC system had exceeded its typical design life. The boilers were aged; however, their burners were retrofitted to natural gas in 2012. Both boilers' chemical circulation pumps had signs of leaks and were corroded. The classrooms had unit ventilators, while other areas of the facility utilized air handling units and fin tube radiators.
- An elevator was installed in the facility in 2007. The elevator served three floors and no major deficiencies were observed.
- The main facility had one water heater located in Room 102B, which was installed in 2018. Portable 1 had a small water heater located in a closet adjacent to the restroom. Portable 1's water heater was installed around 2013.
- Plumbing fixtures were aged but operational. The majority of the water closet flush valves had been updated with dual-flush handles.

Fire Protection

- The fire alarm control panel and fire alarm devices had been recently replaced and were observed to be in good condition with no major deficiencies noted or reported.
- The main facility was protected by a wet pipe sprinkler system covering the corridors, stairwells, and classroom entrances. There were no major deficiencies observed or reported.

Electrical

- With the exception of several newer panel boards, the electrical distribution system was installed during a 1978 electrical renovation which had exceeded its typical design life. All the exterior lighting had recently been upgraded to LED fixtures. The majority of the interior lighting was installed around 1990 and had exceeded its typical design life.

Arch/Struct/Site

- A portion of the interior flooring finishes and classroom casework have exceeded their design lives.

RECENT CAPITAL EXPENDITURES

- Fire Alarm Upgrades in 2020
- Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

- Some classrooms are accessed by going through other classrooms, causing disruption.
- Several classrooms and the library media center have very limited access to natural light.
- Half of the SPED classrooms do not meet the size standard. None of the SPED classrooms have dedicated ADA restrooms.
- The school does not have a dedicated music room, nor does it have an art room.
- The school has a cafegymatorium, limiting use of the space.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Add or re-purpose space for a structured movement room (2,000 SF) to support P.E. instruction. If space for a structured movement area is unavailable, construct an additional covered play structure.
- Re-purpose space to create an art exhibition area.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.
- Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.

Moderate Priority

- Construct a new gymnasium.
- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

SCOTT ELEMENTARY SCHOOL

ADDRESS
6700 NE PRESCOTT ST

CONSTRUCTION DATE
1949 (PRIMARY)

LEVELS
2

BLDG AREA
68,805 SF

SITE AREA
248,728 SF
5.71 ACRES

CLASSROOMS COUNT
29

FUNCTIONAL CAPACITY
643 STUDENTS

CLUSTER
MCDANIEL

MODULAR CLASSROOMS
2

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Situated in the Roseway neighborhood of Portland, Harvey Scott Elementary School occupies the northeast corner of Wellington Park. The school was designed to be expanded as enrollment increased. The campus buildings include a 1949 main building in a modified H-shaped plan, a 1951 detached secondary classroom building, a 1967 industrial arts building, and a 1977 covered play shed. The single-story brick buildings, separated by courtyard spaces, form a variation on a finger plan type school.

The neighborhood consists of a mixture of single family residences built primarily between 1930 and 1950. The primary entrance to the facility is from NE Prescott Street. The play areas and ball fields that occupy the south portion of the campus provide visual continuity with the tree shaded areas of neighboring Wellington Park. The base of the main building features a concrete foundation, while the exterior concrete walls are faced with all stretcher bond bricks exhibiting variegated colors. Harvey Scott School retains excellent integrity with its floor plan, cladding, fenestration, and many interior finishes intact. The school is recommended eligible for the NRHP.

RESJ CONSIDERATIONS

Scott School has multiple attributes that place it in a high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals..

- For the 2021-22 school year, 61% of students identified as BIPOC, significantly greater than the K-5 school mean (34%).
- For the 2021-22 school year, 47% of students qualified for free or reduced lunch, nearly double the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Scott Elementary is forecast at 74% utilization. By the 2030-31 school year, utilization is projected to decrease slightly to 73%.

FACILITY CONDITION SUMMARY

Scott Elementary School is 72 years old, and in fair condition with a facility condition index (FCI) score of 0.08. As the average FCI score for K-5 schools in PPS is 0.18, the building is in much better condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- Several water coolers, including two in the east addition, had signage stating that a lead hazard was present.
- Plumbing fixtures were aged, but operational. The majority of the water closet flush valves had been updated with dual-flush handles.
- Two condensate pump packages were corroded and leaking. These condensate recovery systems had exceeded their typical design lives.
- Air handling units throughout the main facility, shop building, and east addition had exceeded their typical design lives.
- The main facility's boilers were original to the facility but had been retrofitted with gas burners in 2007. The two boilers in the east addition were replaced in 2012.
- The main facility had two new gas water heaters that were installed in 2017.
- The facility had a new passenger elevator connecting the cafeteria, classrooms, and gym levels.

Fire Protection

- The fire alarm control panel and fire alarm devices had been recently replaced and did not have any major deficiencies observed or reported.
- The facility did not have a fire suppression system.

Electrical

- While several panel boards were recently installed or replaced, including the 800 amp main distribution panel, the majority of the electrical distribution equipment had exceeded its typical design life.
- The majority of the lighting at this facility was upgraded to LED at the end of 2018.
- Staff reported that the solar array for the photovoltaic system was no longer functioning and required additional investigation to determine the issue.

Arch/Struct/Site

- Several of the exterior wood doors were deteriorated and had exceeded their design life.
- The front pavement was cracked and uneven near the entrance along Prescott Street.

RECENT CAPITAL EXPENDITURES

- Replacement of Select Playground Equipment in 2017
- Wireless Upgrades in 2018-19
- ADA Upgrades in 2020
- Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

- All kindergarten classrooms share use of one restroom.
- Some finishes are dated and worn.
- The art and music classrooms are in an out-building that looks to be a converted storage shed with cinder block walls. Both rooms are undersized; the music room is 63% of standard and the art room is 61% of the standard.
- The gym is undersized (73% of the size standard) and lacks acoustical treatments. A stage is present.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Add or re-purpose space for a structured movement room (2,000 SF) to support P.E. instruction. If space for a structured movement area is unavailable, construct an additional covered play structure.
- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force,

including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
» Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications. Music is currently taught in a former storage shed.
» Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln. Art is currently taught in a former storage shed.

Moderate Priority

» Construct a new gymnasium.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

SITTON ELEMENTARY SCHOOL

ADDRESS
9930 N SMITH ST

CONSTRUCTION DATE
1949 (PRIMARY)

LEVELS
1

BLDG AREA
58,487 SF

SITE AREA
302,742 SF
6.95 ACRES

CLASSROOMS COUNT
29

FUNCTIONAL CAPACITY
467 STUDENTS

CLUSTER
ROOSEVELT

MODULAR CLASSROOMS
2

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Sitton Elementary School is situated in the primarily residential neighborhood of St. Johns in North Portland. Built in 1949, the school is a simplified version of the Northwest Regional style. The school building is situated on a grass and asphalt-covered campus. The single story building sits on a poured concrete foundation. Cladding for the wood frame structure consists of vertical boards with narrow battens. The building is covered by flat and low pitched gable roofs. The rectangular shape plan houses classrooms, a gymnasium, a covered play area, a courtyard, a media center, a cafeteria and an administrative office.

The playground and playfields are located directly to the south, west and north of the school. The parking area is located directly north of the school building.

Although Sitton School was one of the first schools constructed by Portland Public Schools after World War II, the building is not recommended as eligible for the National Register of Historic Places.

RESJ CONSIDERATIONS

Sitton Elementary School has multiple attributes that place it in a high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals.

» For the 2021-22 school year, 61% of students are historically underserved, significantly above the K-5 school mean (34%).
» For the 2020-21 school year, 47% of students qualified for free or reduced lunch, more than double the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Sitton Elementary is forecast at 76% utilization. By the 2030-31 school year, utilization is projected to decrease to 70%.

FACILITY CONDITION SUMMARY

Sitton Elementary School is 72 years old, and in poor condition with a facility condition index (FCI) score of 0.14. As the average FCI score for K-5 schools in PPS is 0.18, the building is in slightly better condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- A water cooler in this facility had signage stating that a lead hazard was present.
- The plumbing fixtures were aged, but operational. The majority of the water closet flush valves had been updated with dual-flush handles.
- The boilers were original to the facility but had been retrofitted with gas burners in 2012.
- There were 13 unit ventilators located in classrooms throughout the facility. The unit ventilators had exceeded their typical design lives. Many teachers complained the units did not function properly and made excessive noise during class.
- Air handling units observed throughout the facility had exceeded their typical design lives.
- The facility had three gas water heaters located in Room 27. Two of the three water heaters were replaced in 2015 and the third water heater was replaced in 2017. All were in good condition and functioning properly.

Fire Protection

- The fire alarm control panel and fire alarm devices had been recently replaced and had no major deficiencies observed or reported.
- There was a wet pipe sprinkler system observed in the corridors and classrooms. No deficiencies were observed or reported with the system.

Electrical

- While the main switchboard and panel boards supporting the IT equipment were installed in 1998 with no major deficiencies observed, the majority of the electrical distribution equipment had exceeded its typical design life and was in need of replacement.
- Exterior lighting had been upgraded to LED was reported by staff to be insufficient. The interior lighting had mostly exceeded its typical design life.

Arch/Struct/Site

- The roof was replaced in 2019.
- The wood exterior enclosure of the main building was deteriorated.
- There were moderate areas of cracking and repairs to the west walls of the main building.
- The kitchen cooler was recently repainted; however, the paint was deteriorated.
- The small wood retaining wall along the east property fence line was deteriorated.
- Staff reported that the playground equipment had deteriorated.

RECENT CAPITAL EXPENDITURES

- Sidewalk/Curb Replacement in 2018
- Playground Improvements in 2018 and 2020
- Select Flooring Replacements in 2018-19
- Generator Replacement in 2019
- Health and Safety Improvements in 2019
- ADA Upgrades in 2019
- Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

- There are few flexible spaces to support differentiated instruction.
- Classrooms (including general, kindergarten, and ECE) range in size from 80-98% of the standard.
- The SPED classroom does not have a dedicated ADA restroom.
- A science classroom is provided.
- The art classroom is located in a portable.
- A dedicated music room is present.
- The gym is undersized (63% of standard) with dated finishes.
- The office does not have remote control of the main entry doors.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln (note: art is currently taught in a portable classroom).

Moderate Priority

- Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

STEPHENSON ELEMENTARY SCHOOL

ADDRESS
2627 SW STEPHENSON ST

CONSTRUCTION DATE
1965 (PRIMARY)

LEVELS
2

BLDG AREA
40,460 SF

SITE AREA
381,150 SF
8.75 ACRES

CLASSROOMS COUNT
20

FUNCTIONAL CAPACITY
552 STUDENTS

CLUSTER
WELLS-BARNETT

MODULAR CLASSROOMS
0

ZONING
R10 RESIDENTIAL 10,000 CU

HISTORICAL SUMMARY

Stephenson Elementary School is situated in the residential neighborhood of Arnold Creek in Southwest Portland. The 1964 building features elements of the Northwest Regional style including a variety of cladding, roof types, and massing organized to furnish light and ventilation, and provide easy access to the outdoors. The wood frame building features an irregular massing comprised of several wings. The various wings are covered by a mixture of gable, flat and hip roofs. Siding consists of vertical board with battens and wood shingle. Facilities provided by the building include classrooms, a gymnasium/ cafetorium, media center/library and an administrative office.

The campus provides plentiful space for play fields and future school expansion. There is an asphalt-covered half-circle driveway and parking lots located opposite the school's main entrance. An asphalt-covered playground is located directly to the east of the school. Stephenson School is not eligible for listing in the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Stephenson serves a less diverse student population with relatively low poverty levels compared to the district average.

» For the 2021-22 school year, 15% of students are historically underserved, significantly below the K-5 school mean (36%).
» For the 2021-22 school year, 9% of students qualified for free or reduced lunch, significantly below the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Stephenson Elementary is forecast at 66% utilization. By the 2030-31 school year, utilization is projected to decrease to 62%.

FACILITY CONDITION SUMMARY

Stephenson Elementary School is 56 years old, and in poor condition with a facility condition index (FCI) score of 0.15. As the average FCI score for K-5 schools in PPS is 0.18, the building is in slightly better condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The majority of the plumbing fixtures had exceeded typical design life.
» The domestic water piping and sanitary waste piping was assumed to be original and had assumed to have exceeded typical design life.
» The ventilation supply/exhaust fans had exceeded typical design life.
» The classroom ventilators and heaters had exceeded typical design life.
» The pneumatic controls and associated air compressor had exceeded typical design life.

Fire Protection

» The fire alarm control panel and alarm devices were in good condition and had no deficiencies observed.
» There was no sprinkler system observed.

Electrical

» The main distribution panel and 10 of the distribution panels had exceeded typical design life.
» The interior lighting was approaching the end of typical design life.
» The natural gas generator had exceeded typical design life.

Arch/Struct/Site

» Recommend investigation of the sub-floor in the main office and corridor areas. Flex in flooring was observed and tile was damaged.
» The exterior wood siding showed signs of deterioration.
» The VCT flooring was aged beyond design life and damaged throughout. The sub-floor appeared to be damaged in isolated areas.
» The bus loop driveway had large areas of alligator cracking.

RECENT CAPITAL EXPENDITURES

» Select Flooring Replacements in 2018
» Lead Paint Abatement in 2018
» Asbestos Remediation in 2020
» Fire Alarm Upgrades in 2020
» Drinking Fountain Fixture Replacements in 2021

EDUCATIONAL SUITABILITY

» There are no group spaces, individual workstations or collaborative areas for students. The instructional spaces have little spatial configuration capability or flexibility.
» The general education classrooms meet 72% of the size standard.
» SPED spaces are not aligned for the instructional program needs and lack dedicated ADA restrooms.
» An appropriately-sized, dedicated music room is provided.
» The school lacks an art room.
» The school has a small (53% of standard) cafegymatorium, limiting use of the space. A stage is present.
» The food service / kitchen is undersized and can only be used primarily to warm prepared food from the PPS central kitchen.
» The media center is an open concept layout, causing acoustical challenges.
» There are no controlled entrances at the building doorways.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Add or re-purpose space for a structured movement room (2,000 SF) to support P.E. instruction. If space for a structured movement area is unavailable, construct an additional covered play structure.
» Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
» Re-purpose space to create an art exhibition area.
» Security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations

of PPS' All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
» Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.

Moderate Priority

» Construct a new gymnasium.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

VESTAL ELEMENTARY SCHOOL

ADDRESS
161 NE 82ND AVE

CONSTRUCTION DATE
1929 (PRIMARY)

LEVELS
2

BLDG AREA
72,906 SF

SITE AREA
206,474 SF
4.74 ACRES

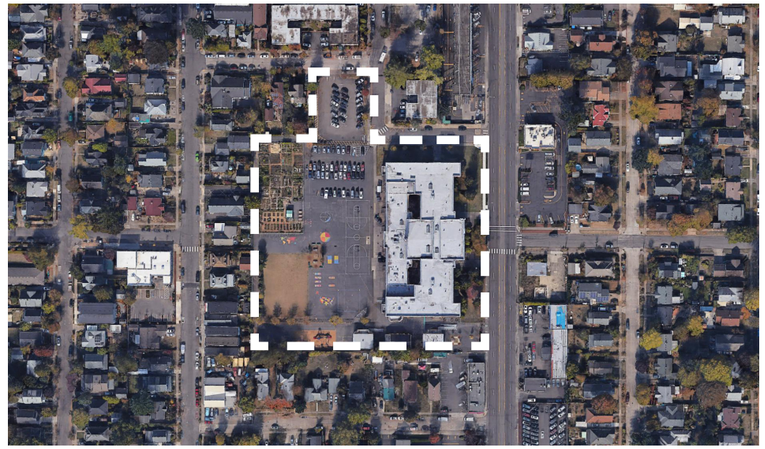
CLASSROOMS COUNT
23

FUNCTIONAL CAPACITY
554 STUDENTS

CLUSTER
MCDANIEL

MODULAR CLASSROOMS
3

ZONING
R1 RESIDENTIAL 1,000 CU
R2.5 RESIDENTIAL 2,500 CU



HISTORICAL SUMMARY

Vestal Elementary School is situated in the Montavilla neighborhood of east Portland. The campus consists of a primary rectangular shaped building and three portable buildings. The primary building is two-stories in height and constructed of reinforced concrete with brick veneer. The 1929 Collegiate Gothic style building is ornamented with buttresses, stone belt courses, and decorative motifs. Bands of aluminum windows with stone surrounds provide the fenestration. The front entrances, located along a central projecting bay with Tudor arched windows, feature stone surrounds and fan lights. The building is covered by a flat roof with stone cap along the parapet. The rectangular mass rests on a poured concrete foundation. Double loaded corridors provide access to the administrative offices, classrooms, and recreation spaces.

The neighborhood consists of single family residences built around the 1920s. The primary entrances to the facility are from NE 82nd Avenue.

Play areas and open space occupy the western end of the campus. South of the main building are three rectangular portable buildings arranged in a row from east to west featuring drop siding, fixed and hopper windows, and poured concrete foundations. The western and eastern buildings have flat roofs, while the central building is capped by a gable roof with shed roofed addition. .

Vestal School retains excellent integrity of location, design, setting, materials, workmanship, feeling, and association with minimal alterations to its plan and finishes and is recommended as eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Vestal School has attributes that place it in a moderately high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals.

» For the 2021-22 school year,

43% of students are historically underserved, exceeding the K-5 school mean (34%).
» For the 2021-22 school year, 44% of students qualified for free or reduced lunch; this is greater than the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Vestel Elementary is forecast at 43% utilization. By the 2030-31 school year, utilization is projected to decrease to 41%.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Vestal Elementary School is 92 years old, and in poor condition with a facility condition index (FCI) score of 0.21. As the average FCI score for K-5 schools in PPS is 0.18, the building is in worse condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The majority of the plumbing fixtures were aged, but operational. The majority of the water closet flush valves had been updated with dual-flush handles.
» The main facility's boilers were original to the facility but had been retrofitted with gas burners in 2012. The boilers' chemical circulation pumps were corroded.
» All unit ventilators in the classrooms and air handling units throughout the facility had exceeded their typical design lives.

Fire Protection

» The fire alarm control panel and fire alarm devices had been recently replaced in the main school. The fire alarm devices in the three portables were not replaced during the recent upgrade and had exceeded their typical design life.
» The facility did not have a fire suppression system.

Electrical

» While several panel boards were recently installed or replaced, including the 800 amp main distribution panel, the majority of the electrical distribution equipment had exceeded its typical design life.
» The exterior lighting had been upgraded to LED recently, but the majority of the interior lighting had exceeded its typical design life.

Arch/Struct/Site

» The roof was deteriorated and has exceeded its design life.
» Window leaks were observed in gymnasium causing interior damage to gym floor and interior walls.
» The concrete slab above the boiler room was deteriorated and had signs of water intrusion.
» The majority of interior architectural components have exceeded their design life.

RECENT CAPITAL EXPENDITURES

» ADA Upgrades in 2018
» Wireless Upgrades in 2018
» Construction of Select Permanent Walls in 2019-20
» Asbestos Remediation in 2020
» Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

» Most of the general classrooms are 68% of the size standard, whereas kindergarten classrooms are 58% of the size standard. Additionally, one kindergarten classroom is located in a portable. There are few spaces to support differentiated learning.
» The K-2 intensive skills classroom is 84% of the size standard. The 3-5th grade intensive skills classroom is 79% of the size standard.
» The school does not have a dedicated music classroom.
» The art classroom is located in a portable.
» A small cafegymatorium is provided (60% of size standard), limiting use of the space.
» There is an auditorium with a small stage that lacks acoustical treatments.
» The main entrance is actively controlled, but is not located near the main office.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Add or re-purpose space for a structured movement room (2,000 SF) to support P.E. instruction. If space for a structured movement area is unavailable, construct an additional covered play structure.
» Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
» Re-purpose space to create an art exhibition area.
» Security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
» Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.
» Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln. Art is currently taught in a portable classroom.

Moderate Priority

» Construct a new gymnasium.
» Re-purpose an existing space into a wellness room.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

WHITMAN ELEMENTARY SCHOOL

ADDRESS
7326 SE FLAVEL ST

CONSTRUCTION DATE
1954 (PRIMARY)

LEVELS
1

BLDG AREA
57,244 SF

SITE AREA
316,681 SF
7.27 ACRES

CLASSROOMS COUNT
26

FUNCTIONAL CAPACITY
493 STUDENTS

CLUSTER
CLEVELAND

MODULAR CLASSROOMS
0

ZONING
R2 RESIDENTIAL 2,000 CU

HISTORICAL SUMMARY

Marcus Whitman Elementary School is located in Southeast Portland. The campus consists of a U-shaped building built in 1954. The Northwest Regional style school incorporates an interior garden to provide maximum light and ventilation to the classrooms. Moderately sloped gable roofs cover the single story building. Fenestration consists of grouped metal frame windows. Also illustrative of the Northwest Regional style is the prominent gabled portico that marks the front entry, the exposed beam structure, and variations in massing to express internal functions on the building's exterior. The wood frame building, clad in red brick, rests on a poured concrete foundation. Moderately sloped gable roofs cover the single story building.

Recreational facilities include asphalt play areas located on the west side of the building and grass playfields on the south end of the campus. A good example of the finger plan type school in the Northwest Regional style that exhibits a high degree of integrity with its floor plan, cladding, and many interior finishes intact, Marcus Whitman Elementary School is recommended as eligible for the NRHP.

RESJ CONSIDERATIONS

Marcus Whitman Elementary School has multiple attributes that place it in a high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals.

» For the 2021-22 school year, 46% of students are historically underserved significantly greater than the K-5 school mean (34%).
» For the 2021-22 school year, 45% of students qualified for free or reduced lunch, exceeding the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Whitman Elementary is forecast at 43% utilization. By the 2030-31 school year, utilization is projected to decrease to 41%.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Whitman School is 67 years old, and in poor condition with a facility condition index (FCI) score of 0.18. As the average FCI score for K-5 schools in PPS is 0.18, the building is in similar condition to many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The majority of the domestic water distribution equipment had been replaced in the past five years.
» The HVAC controls had been updated to DDC controls.
» The majority of the HVAC equipment was original to facility construction in 1954.
» The plumbing fixtures had no deficiencies observed. The domestic water piping and sanitary waste piping were not visible for assessment, but had no deficiencies reported.

Fire Protection

» The school had a wet pipe sprinkler system that served the entire building.
» The fire alarm control panel and alarm devices had no deficiencies observed.

Electrical

» The electrical distribution equipment had no deficiencies observed. Distribution branch wiring and grounding systems were not visible for assessment, but had no deficiencies reported.

Arch/Struct/Site

» The wood window frames were weathered, and much of the caulk was cracked and failing. The aluminum window frames were warped, old screw holes remained unfilled and many seals were failed around the window edges.
» Many of the vinyl tiles in the cafeteria were crumbling or patched, with epoxy seal failing.
» The majority of the interior finishes had exceeded their design lives.

RECENT CAPITAL EXPENDITURES

» ADA Upgrades in 2018
» Construction of Head Start Playground in 2018
» Wireless Upgrades in 2019
» Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

» General classrooms are well-sized; however, kindergarten classrooms only meet 75% of the size standard and lack dedicated restroom access.
» The school lacks purposely designed special education spaces.
» A small music room is present (62% of size standard).
» The school lacks a dedicated art classroom, but I kiln is present off of the faculty dining room.
» The gym meets 78% of the size standard.
» The cafeteria is equipped with a stage. The kitchen is undersized.
» The main entrance has no visual or active control from the office. There is no buzzer/camera system and no security vestibule.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
» Re-purpose space to create an art exhibition area.
» Security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom

per the district's Educational Specifications
» Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications (kiln is present).

Moderate Priority

» Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

WOODLAWN ELEMENTARY SCHOOL

ADDRESS
7200 NE 11TH AVE

CONSTRUCTION DATE
1926 (PRIMARY)

LEVELS
2

BLDG AREA
106,432 SF

SITE AREA
223,898 SF
5.14 ACRES

CLASSROOMS COUNT
32

FUNCTIONAL CAPACITY
644 STUDENTS

CLUSTER
JEFFERSON

MODULAR CLASSROOMS
3

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Situated in the Woodlawn neighborhood of Northeast Portland, the Woodlawn Elementary School campus consists of a primary U-shaped building and three detached buildings that house classrooms. The primary building was built in 1926 in the Collegiate Gothic style. The building is two-stories in height and constructed of reinforced concrete with brick veneer. It is ornamented with stone belt courses, quoins, and decorative motifs. Bands of aluminum windows with stone surrounds provide the fenestration. The primary entry to the building is through doors that flank a central projecting bay on the west elevation. Double loaded corridors provide access to the administrative offices, classrooms, and recreation spaces.

The neighborhood consists of single family residences built between 1920 and 1950 in association with the Scoffin's Addition to the City of Portland. The primary entrances to the facility are from 7200 NE 11th Avenue. Play areas and open spaces occupy the eastern end of the campus. To the south of the main building are two portable buildings and a concrete block building arranged in a row from east to west. The portable buildings (1965, 1966) have gable roofs, aluminum hopper sash windows, and board and bat siding. The concrete block building (1966) features a flat roof and fixed aluminum windows.

Due to this loss of integrity, Woodlawn School is not eligible under either NRHP Criteria A, B, or C.

RESJ CONSIDERATIONS

Woodlawn Elementary School has multiple attributes that place it in a high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals.

» For the 2021-22 school year, 60% of students are historically underserved, significantly greater than the K-5 school mean (34%).
» For the 2021-22school year, 36% of students qualified for free or

reduced lunch, exceeding the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Woodlawn Elementary is forecast at 52% utilization. By the 2030-31 school year, utilization is projected to decrease to 47%.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Woodland Elementary School is 95 years old, and in fair condition with a facility condition index (FCI) score of 0.07. As the average FCI score for K-5 schools in PPS is 0.18, the building is in considerably better condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the HVAC system had exceeded its typical design life. The boilers were aged; however, their burners were retrofitted to natural gas in 2004. The classrooms had unit ventilators, most of which appeared to have been replaced around 2000. Other areas of the facility utilized air handling units and fin tube radiators.
- An elevator was installed in the facility in 2017. The elevator served two floors and did not have any major deficiencies.
- The main facility had two water heaters located in Room 1. The water heaters were installed in 2011 and 2013.
- Plumbing fixtures were aged but operational. The majority of the water closet flush valves had been updated with dual-flush handles.

Fire Protection

- While the fire alarm control panel was fairly new, the majority of the fire alarm devices had exceeded their typical design lives.
- The main facility was protected by a wet pipe sprinkler system covering the corridors and stairwells. There were no major deficiencies observed or reported.

Electrical

- The main distribution switchboard had been replaced in 2017 and the panels supporting the IT equipment were installed in 1997. The remaining pieces of the electrical distribution system were much older and had exceeded their typical design lives. The exterior lighting had recently been upgraded to predominantly LED fixtures. The majority of the interior lighting had exceeded its typical design life.

Arch/Struct/Site

- There was evidence of significant water intrusion in the locker room, storage room and gym. The large and small roof sections were ponding at several locations.
- Portable 1 and 2 roofs have exceeded their typical design life.
- Staff reported the boiler room floods from the site drain located just outside at the exterior stairs.
- The acoustical ceiling tiles were detached throughout the second floor.
- The paint was deteriorating inside the kitchen cooler.

RECENT CAPITAL EXPENDITURES

- Drinking Fountain Fixture Replacements in 2020
- Partial Roof Replacement in 2021

EDUCATIONAL SUITABILITY

- Classrooms are undersized. The kindergarten classroom lack dedicated restrooms.
- The school lacks purposely designed special education spaces.
- The gym is greatly undersized (less than 38% of standard).
- The school lacks a dedicated music room.
- Core areas, such as the library media center and cafeteria, are undersized.
- An art classroom is provided.
- The school lacks a controlled main entry.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.

Moderate Priority

- Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

WOODMERE ELEMENTARY SCHOOL

ADDRESS
7900 SE DUKE ST

CONSTRUCTION DATE
1954 (PRIMARY)

LEVELS
1

BLDG AREA
51,900 SF

SITE AREA
240,887 SF
5.53 ACRES

CLASSROOMS COUNT
24

FUNCTIONAL CAPACITY
473 STUDENTS

CLUSTER
FRANKLIN

MODULAR CLASSROOMS
4

ZONING
R2.5 RESIDENTIAL 2,500 CU

HISTORICAL SUMMARY

Woodmere Elementary School is located in the Brentwood Darlington neighborhood of Southeast Portland. The campus consists of an H-shaped building built in 1954 and two portable classrooms buildings. The Northwest Regional style school incorporates an interior garden to provide maximum light and ventilation to the classrooms. The wood frame building is clad in red brick. Moderately sloped gable roofs cover the single story building. Fenestration consists of grouped metal frame windows. Development in the neighborhood consists primarily of single family residences built between 1950 and 2000. Recreational facilities include asphalt play areas located on the south side of the building and grass playfields situated at the west end of the campus.

The Woodmere School is a good example of the finger plan type school in the Northwest Regional style that exhibits a high degree of integrity with its floor plan, cladding, and many intact interior finishes and is eligible for the NRHP under Criterion A.

RESJ CONSIDERATIONS

Woodmere Elementary School has multiple attributes that place it in a high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals.

» For the 2021-22 school year, 44% of students are historically underserved significantly greater than the K-5 school mean (47%).
» For the 2021-22 school year, 50% of students qualified for free or reduced lunch, nearly double the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Woodmere Elementary is forecast at 57% utilization. By the 2030-31 school year, utilization is projected to decrease to 55%.

Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Woodmere Elementary School is 67 years old, and in poor condition with a facility condition index (FCI) score of 0.21. As the average FCI score for K-5 schools in PPS is 0.18, the building is in worse condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The majority of the mechanical and plumbing system were aged and had exceeded their intended design lives.
» Signage was present throughout indicating pipe and equipment insulation contained asbestos.
» Kitchen staff stated the kitchen's AHU had not operated for the last two years.

Fire Protection

» The fire alarm control panel and devices were upgraded in 2018 and were in good condition with no deficiencies observed.
» The main facility had a wet-pipe sprinkler system typically that served the auditorium's back of stage area. No major deficiencies were observed or reported with the fire protection system at the time of assessment.

Electrical

» Approximately 85% of the distribution panel boards had exceeded design life.

Arch/Struct/Site

» The exterior wood cladding on was moderately to heavily weathered with flaking paint and some splintering panels on the roof.
» The rolled roof covering had been coated but was severely deteriorated and cracking. A leak was reported in the YMCA room, but there were many stained ceiling tiles indicating other leaks. There was moderate ponding above the gym. Some of the gutters and downspouts were clogged causing water to drain into the soffit.
» The brick stack at the boiler exhaust was heavily deteriorated with major separation at some joints.
» The exterior metal doors were moderately dented, and some had been vandalized with graffiti.
» The wood floor of the stage was heavily worn and chipped.
» The carpeting in the classrooms was moderately worn.
» The carpet was worn and stained in Portables 1 and 2.
» The exterior metal doors of Portables 1 and 2 were heavily dented and damaged.
» The exterior ramp and stairs of Portables 1 and 2 were weathered with flaking paint and signs of water damage.
» The exterior engineered wood cladding of Portables 1 and 2 was moderately weathered with flaking paint. Staff reported that gutters were overflowing at door entrances.
» The exterior steps at SE Duke Street was missing a handrail.

RECENT CAPITAL EXPENDITURES

» Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

» There are no designed spaces in the school to support differentiated learning activities or different sized groups
» Classrooms are generally well-sized.
» The two (2) SPED classrooms are located adjacent to a pair of restrooms, but do not have dedicated access from within the room. The changing table is located in the gender-neutral restroom across the hall from the classrooms.
» No art room is present. A kiln is present but not vented.
» Music is held in a general classroom that is undersized for music instruction (75% of size standard) and has poor acoustics.
» The gym is undersized (63% of size standard).
» While the cafeteria is appropriately sized (with a stage), the kitchen is small and poorly configured.
» The main entrance is kept locked and has a buzzer to gain access, but there is no working camera and no active control of visitors once they have been admitted.
» The campus lacks drop-off lanes; all vehicle and bus access is along the street.

EDUCATIONAL PROGRAM

FORECAST

High Priority

» Evaluate Woodmere as a possible candidate for adding or repurposing space to provide two (2) appropriately sized and designed pre-k classrooms to support the needs of early learners in southeast Portland.
» Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
» Re-purpose space to create an art exhibition area.
» Security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
» Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications. Music is currently held in a general classroom.
» Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.

Moderate Priority

» Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

WOODSTOCK ELEMENTARY SCHOOL

ADDRESS
5601 SE 50TH AVE

CONSTRUCTION DATE
1910 (PRIMARY)

LEVELS
1

BLDG AREA
65,221 SF

SITE AREA
219,542 SF
5.04 ACRES

CLASSROOMS COUNT
28

FUNCTIONAL CAPACITY
648 STUDENTS

CLUSTER
CLEVELAND

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Situated in the Woodstock neighborhood of Southeast Portland, Woodstock Elementary School occupies the south portion of Woodstock Park. The school facility consists of a modified E-shaped building. Built in the Classical Revival style, the entry to the school is located beneath a portico supported by Doric columns that divides the building bilaterally. Fenestration consists primarily of vinyl six-over-one double-hung windows with wood surrounds. Architectural embellishments in the Classical Revival style include a water table, entablature, and Tuscan corner boards with pilasters.
The neighborhood is comprised of primarily single family residences built between 1900 and 1950.

The primary entrance to the school is from the east on SE 50th Street. Grass and asphalt covered play areas occupy the west portion of the parcel.

The Woodstock School is recommended as eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

While Woodstock serves a fairly diverse student population, student poverty levels are relatively low compared to other elementary schools in the district.

» For the 2021-22 school year, 10% of students are historically underserved, below the K-5 school mean (34%).
» For the 2021-22 school year, 13% of students qualified for free or reduced lunch, below the K-5 school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Woodstock Elementary is forecast at 87% utilization. By the 2030-31 school year, utilization is projected to decrease to 81%.

FACILITY CONDITION SUMMARY

Woodstock Elementary School is 111 years old, and in fair condition with a facility condition index (FCI) score of 0.06 As the average FCI score for K-5 schools in PPS is 0.18, the building is in significantly better condition than many of the elementary schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The drinking fountain in the cafeteria was not operable due to lead. There were frequent problems with students using the portable drinking station.
- The majority of the plumbing fixtures had exceeded their design lives.
- The vast majority of the heating and cooling equipment, exhaust fans, and associated equipment had exceeded their design lives.

Fire Protection

- The building did not have a sprinkler system.
- A new addressable fire alarm system headend (Potter PFC-6800) and associated detection and signal devices were installed within the past year.

Electrical

- The site's main distribution switchboard was installed in 1985 and had exceeded its design life. A sub-distribution board had been installed in 1997 and was observed to be in good condition. All of the building's panel boards had been replaced in 1985 and had exceeded their design lives, save for three panel boards added in 1997 as part of the telecommunications upgrade. A generator had been installed in 1997.

Arch/Struct/Site

- The windows were difficult to operate and a portion of the windows had metal grates covering the window. The operability of the windows was a safety concern in the event of an emergency. There were sections of broken glass block window.
- The sidewalk around the school was heaving and presented a trip hazard.
- The VCT flooring was aged beyond design life and damaged. It was reported that the mastic possibly contained a hazardous substance.

RECENT CAPITAL EXPENDITURES

- Lead Paint Abatement in 2017
- Asbestos Remediation in 2018 and 2020
- Drainage Improvements in 2018
- Select Flooring Replacements in 2020

EDUCATIONAL SUITABILITY

- The general classrooms meet 80% of the size guideline with limited access to spaces that support flexible learning.
- The music room lacks acoustical treatments.
- A converted general classroom is used for art instruction.
- A cafegymatorium (with stage) is present, limiting the use of the space.
- The layout of the servery area in the cafeteria creates congestion.
- Entrances are not well controlled.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln (Note: art is currently taught in a general classroom)..

Moderate Priority

- Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

K-8 SCHOOLS

ASTOR K-8 SCHOOL

ADDRESS
5601 N YALE ST

CONSTRUCTION DATE
1949 (PRIMARY)

LEVELS
1

BLDG AREA
49,434 SF

SITE AREA
175,111 SF
4.02 ACRES

CLASSROOMS COUNT
26

FUNCTIONAL CAPACITY
559 STUDENTS

CLUSTER
ROOSEVELT

MODULAR CLASSROOMS
4

ZONING
OS - OPEN SPACE CU

HISTORICAL SUMMARY

The Astor K-8 School is situated in the residential neighborhood of University Park in North Portland. Built in 1949, the Northwest Regional style school building is situated on a grass and asphalt-covered campus. Directly northeast of the school is an asphalt-covered playground with a covered play shed. The building is a one-story with a wood frame.

The H-shaped mass of the school is oriented on a north-south axis and rests on a poured concrete foundation. The wood frame building is clad with vertical board and batten siding. Shallow pitched gable roofs cover the two parallel wings of the single story building. The finger plan facilitates direct access to the playground and other outdoor spaces from the classrooms.

The school was built in response to the residential development in North Portland during the PPS program of post-war construction and is eligible for the NRHP under Criterion A.

RESJ CONSIDERATIONS

Astor's student population is largely reflective of district-wide averages for K-8 schools:

- For the 2021-22 school year, 36% of students are historically underserved, slightly greater than the K-8 school mean (29%).
- For the 2021-22 school year, 21% of students qualified for free or reduced lunch, slightly above the K-8 school mean (19%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Astor K-8 is forecast at 72% utilization. By the 2030-31 school year, utilization is projected to decrease to 60%.

FACILITY CONDITION SUMMARY

Astor K-8 School is 72 years old, and in poor condition with a facility condition index (FCI) score of 0.16. As the average FCI score for K-8 schools in PPS is 0.16, the building is typical of other K-8 schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The domestic water boiler and storage tank were replaced in the 1990s and observed to be in average condition.
- The majority of HVAC equipment was original to facility construction.
- The plumbing fixtures had no deficiencies observed. The domestic water piping and sanitary waste piping were not visible for assessment, but had no deficiencies reported.
- The AC units utilized R22 refrigerant which is being phased out of use.

Fire Protection

- The school had a wet pipe sprinkler system that served only the stage area.
- The fire alarm control panel and alarm devices had no deficiencies observed.

Electrical

- The electrical distribution equipment had no deficiencies observed. Distribution branch wiring and grounding systems were not visible for assessment, but had no deficiencies reported.

Arch/Struct/Site

- In the north addition, the aluminum window frames were moderately deteriorated with bent frames and many errant screw holes.
- The VCT flooring in the cafeteria had stress cracking throughout.
- The majority of the interior finishes had exceeded their design lives.

RECENT CAPITAL EXPENDITURES

- Lead Paint Abatement in 2017
- Radon Mitigation in 2018
- Wireless Upgrades in 2018
- Select Flooring Replacements in 2020
- Fire Alarm Upgrades in 2020

EDUCATIONAL SUITABILITY

- There are few designed spaces to support differentiated learning. Most areas lack flexible break-out space.
- The SPED classroom is undersized (70% of size standard) and lacks a dedicated ADA restroom. Students must use a staff restroom across the hall. A large Learning Resource Center is present.
- Three (3) STEM classrooms are provided. All are equipped with appropriate sinks and casework. Two of the rooms have overhead power. One of the classrooms has inadequate ventilation. No formal art classroom is present.
- The music room is located in a portable building.
- The gym is undersized (66% of size standard).
- The cafeteria is adequately sized with a small stage.
- The school does not have a buzzer/camera at the front door and there is no active supervision of the door from the office.

EDUCATIONAL PROGRAM

FORECAST

High Priority

- Re-purpose space to create an art exhibition area.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications. Music is currently taught in a portable classroom.
- Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.

Moderate Priority

- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align

with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

BEVERLY CLEARY - FERNWOOD K-8 SCHOOL

ADDRESS
1915 NE 33RD AVE

CONSTRUCTION DATE
1911 (PRIMARY)

LEVELS
3

BLDG AREA
88,815 SF

SITE AREA
186,001 SF
4.27 ACRES

CLASSROOMS COUNT
28

FUNCTIONAL CAPACITY
555 STUDENTS

CLUSTER
GRANT

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Situated in the Grant Park neighborhood of East Portland, the Fernwood K-8 School campus consists of a 1911-1924 U-shaped building with a large 1978 addition. The main building retains Classical Revival-style elements and is two-stories in height with a lighted basement. It is a reinforced concrete building with brick veneer. Ornamentation includes decorative brickwork, terra cotta belt courses, and terra cotta tiles. Other ornamentation includes pronounced terra cotta cornices and flat roofs with terra cotta caps along the parapets. Bands of aluminum windows provide the fenestration. The main entrance is marked by double doors, a terra cotta segmental pediment, and columns. Double loaded corridors provide access to the administrative offices, classrooms, and recreation spaces.

The Grant Park neighborhood consists of single family residences built primarily between 1920 and 1950. Play areas and open space occupy the western end of the campus and are sited to the north of NE Hancock Street.

The Fernwood Middle School does not have integrity of design and materials to consider it eligible for listing in the National Register of Historic Places.

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Fernwood serves a less diverse student population with relatively low poverty levels compared to the district average.

» For the 2021-22 school year, 13% of students are historically underserved, well below the K-8 school mean (29%).
» For the 2021-22 school year, 5% of students qualified for free or reduced lunch, significantly below the K-8 school mean (19%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Beverly Cleary (both Fernwood and Hollyrood combined) is forecast at 80%. Enrollment is expected to decline over the next several years, reaching 68% (for both Fernwood and Hollyrood combined) by 2030-31.

FACILITY CONDITION SUMMARY

Beverly Cleary - Fernwood K-8 School is 110 years old, and in fair condition with a facility condition index (FCI) score of 0.1. As the average FCI score for K-8 schools in PPS is 0.16, the building is in comparatively better condition than most other K-8 schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of plumbing fixtures had exceeded their design lives. The domestic water distribution equipment was recently replaced and in excellent condition.
- The vast majority of the steam heating equipment, exhaust fans, air handling units, fan coil units, controls and associated equipment had exceeded their design lives.

Fire Protection

- The building was observed to be fully sprinklered.
- An addressable fire alarm system headend (Silent Knight 5820) and associated detection and signal devices were installed (estimated) in 2014.

Electrical

- The site's main distribution switchboard was installed in 1978 and had exceeded its design life. The majority of the school's panel boards were installed in the same year and had exceeded their design lives. Three panel boards had been installed in 1998 as part of the technology upgrade and had no major deficiencies. One panel board was installed in 2005 for additional coverage of the kitchen and had no major deficiencies.
- An exterior lighting upgrade occurred in late 2019 to bring exterior light levels up to code.

Arch/Struct/Site

- The carpet floor finish in the main building was aged and had excessive wear in high traffic areas.
- The painted concrete floor finish in the main building was aged and had excessive wear and chipping.

RECENT CAPITAL EXPENDITURES

- ADA Improvements in 2018
- Seismic Strengthened Roof in 2018
- Water Heater Replacement in 2018
- Plumbing Upgrades in 2019
- Fire Alarm Upgrades in 2020
- Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

- Science labs are undersized but in good overall condition.
- SPED classrooms are undersized (69% of size standard).
- Dedicated art and music rooms are present.
- The gym is adequately sized but with worn finishes.
- An auditorium is present.
- The entrance to the school is not controlled or supervised.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.

Moderate Priority

- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

CESAR CHAVEZ K-8 SCHOOL

ADDRESS
5103 N WILLIS BLVD.

CONSTRUCTION DATE
1928 (PRIMARY)

LEVELS
2

BLDG AREA
78,061 SF

SITE AREA
211,266 SF
4.85 ACRES

CLASSROOMS COUNT
32

FUNCTIONAL CAPACITY
589 STUDENTS

CLUSTER
ROOSEVELT

MODULAR CLASSROOMS
2

ZONING
R2 RESIDENTIAL 2,000 CU

HISTORICAL SUMMARY

Situated in the primarily single family residential neighborhood of Portsmouth in North Portland, Cesar Chavez, formerly Clarendon-Portsmouth, School is a two-story school building with a ground floor basement. Built in 1928, the hybrid style building features Classical Revival detailing as well as Spanish Revival/Mediterranean Revival style tile roof. Cladding for the reinforced concrete structure consists of brick veneer with cast stone ornamentation. The building's irregularly shaped plan provides spaces for classrooms, a media center, an auditorium, a gymnasium, a cafeteria, and an administrative office.

Situated in the primarily single family, residential neighborhood of Portsmouth in North Portland, Cesar Chavez School, which faces North Willis Boulevard, is situated at the south side of the campus. The building is surrounded by asphalt covered parking lots and play areas. Grass covered play areas occupy the northeast portion of the campus.

While Portsmouth School is a notable historic resource that is representative of public school planning during the progressive era and the work of George Jones, it does not retain a level of historical integrity commensurate with other Portland Schools constructed during the same period; therefore, it is not eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Chavez School has multiple attributes that place it in a high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals.

- For the 2021-22 school year, 77% of students are historically underserved, more than double the K-8 mean (29%).
- For the 2021-22 school year, 47% of students qualified for free or reduced lunch, more than double the K-8 mean (19%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Cesar Chavez K-8 School is forecast at 92% utilization. By the 2030-31 school year, utilization is projected to decrease to 80%.

FACILITY CONDITION SUMMARY

Cesar Chavez K-8 School is 93 years old, and in poor condition with a facility condition index (FCI) score of 0.14. As the average FCI score for K-8 schools in PPS is 0.16, the building is in slightly better condition than many K-8 schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the domestic water distribution equipment had been replaced in the past five years.
- Most of the air handling units had been replaced around 1990 and the condensate recovery equipment was replaced in 2017.
- The plumbing fixtures had no deficiencies observed. The domestic water piping and sanitary waste piping were not visible for assessment, but had no deficiencies reported.

Fire Protection

- The building did not have a fire suppression system.
- The fire alarm control panel and alarm devices had no deficiencies observed.

Electrical

- The electrical distribution equipment had no deficiencies observed.

Arch/Struct/Site

- On the roof, the flashing around the parapet wall was heavily deteriorated. Significant ponding was occurring on the lower west roof.
- The skylight frames had moderate corrosion, tears and dents.
- The majority of the interior components were aged beyond typical design life.

RECENT CAPITAL EXPENDITURES

- Select Flooring Replacements in 2018
- Refinished Gym Floor in 2019
- Exterior Fencing Extension in 2018
- Wireless Upgrades in 2018
- Installation of Restroom at Modular Classroom
- Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

- Classrooms are generally undersized (approximately 69% of size standards), particularly the kindergarten classrooms (60% of size standard). Some kindergarten classrooms lack a sink; others lack a dedicated restroom.
- One small science lab is present (71% of size standard) and lacks an emergency shower.
- The music room is located in the basement; an area with low ceilings and little natural light.
- The art classroom is very small (58% of size standard).
- The gym is only slightly undersized, but has poor acoustics. Locker rooms are dated.
- A large library media center is present; however, the layout is awkward to navigate.
- The main office retains active control of the main entry doors.
- The servery in the cafeteria is undersized, causing bottlenecks.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space

to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
» Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.

Moderate Priority

» Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entries of non-modernized schools to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

CLARK K-8 CREATIVE SCIENCE SCHOOL

ADDRESS
1231 SE 92ND AVE

CONSTRUCTION DATE
1955 (PRIMARY)

LEVELS
1

BLDG AREA
50,227 SF

SITE AREA
300,564 SF
6.9 ACRES

CLASSROOMS COUNT
23

FUNCTIONAL CAPACITY
495 STUDENTS

CLUSTER
MCDANIEL

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

The former William Clark Elementary School is now known as Creative Science School. The school is a one-story brick veneer building designed in the International style. The campus consists of the 1955 single story brick-faced building that forms a modified H-shaped plan. The single-story brick wings that comprise the building are separated by a courtyard and form a variation on a finger plan type school. The building features International style elements such as a linear composition and an asymmetrical plan. In addition, bands of aluminum windows, flat roofs, overhangs, and a lack of ornamentation serves to reinforce the ideals of functionalism and minimalism.

The Creative Science School is situated in the Montavilla neighborhood of East Portland. The campus occupies a long, narrow parcel between SE 92nd Avenue on the east and SE 89th Avenue on the west. The school is located on the east end of the campus, and parking is to the north. Recreational facilities include play fields at the western end of the campus, and playgrounds at the south end of the campus. Berrydale Park is located immediately to the north of the school campus.

The school retains excellent integrity of location, design, setting, materials, workmanship, feeling, and association with its plan and exterior and interior finishes. The 1955 International style influenced school is recommended as eligible for the National Register of Historic Places (NRHP) for its association with the PPS program of post-war construction.

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Creative Science School serves a less diverse student population with relatively low poverty levels compared to the district average.

» For the 2021-22 school year, 17% of students are historically underserved, below the K-8

school mean (29%).
» For the 2021-22 school year, 14% of students qualified for free or reduced lunch, slightly below the K-8 mean (19%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Clark K-8 Creative Science School is forecast at 92% utilization. By the 2030-31 school year, utilization is projected to increase slightly to 93%.

FACILITY CONDITION SUMMARY

Clark K-8 Creative Science School is 66 years old, and in poor condition with a facility condition index (FCI) score of 0.17. As the average FCI score for K-8 schools in PPS is 0.16, the building is in slightly worse condition than many K-8 schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The supply fan located in the gym fan room was not operating at the time of the assessment.
» Most of the domestic water equipment had been replaced in the past eight years and was observed to be in good condition.
» All the rooftop exhaust fans were replaced in 2015 and were in good condition. Most of the remaining HVAC equipment was original to the facility's construction.

Fire Protection

» There was a wet pipe sprinkler system that only served the stage area in the cafetorium.

Electrical

» The majority of the site's electrical system, including the service entrance equipment and distribution panel boards appeared to be original to the facility's construction and had exceeded typical design life.

Arch/Struct/Site

» The exterior brick wall was heavily weathered in spots, with some areas of minor to moderate cracking and patching. A major crack on the north wall of the gym had been patched but had since cracked through the repair.
» Most of the interior architectural assets were observed to be in average condition. The ceramic tile flooring in the restrooms had exceeded its design life.
» Many of the clerestory glass blocks in the north walls of the cafeteria and gym have been cracked or patched with unlike blocks.
» The exterior metal doors had exceeded their design lives. The exterior doors to the gym were heavily dented.
»

RECENT CAPITAL EXPENDITURES

» ADA Upgrades in 2019-20
» Design for SRGP Grant in 2021
» Drinking Fountain Fixture Replacements in 2021

EDUCATIONAL SUITABILITY

» Classrooms are generally appropriately sized.
» The school lacks purposely designed special education spaces.
» The science labs are partially-converted general classrooms with only one sink, no gas, and insufficient outlets.
» A separate music room is not provided; music instruction is held on the stage.
» A small art room is provided, as well as a kiln (not adjacent).
» The gym is significantly undersized (59% of size standard) and lacks acoustical treatments.
» The library media center is adequately sized and in good condition.
» The main office does not have active control of the main entry doors.
» A multipurpose cafeteria/auditorium is provided with a small kitchen.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
» Re-purpose space to create an art exhibition area.
» Security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
» Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.

Moderate Priority

» Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

EAST SYLVAN K-8 SCHOOL

ADDRESS
1849 SW 58TH AVE

CONSTRUCTION DATE
1933 (PRIMARY)

LEVELS
2

BLDG AREA
24,875 SF

SITE AREA
270,072 SF
6.2 ACRES

CLASSROOMS COUNT
11

FUNCTIONAL CAPACITY
174 STUDENTS

CLUSTER
LINCOLN

MODULAR CLASSROOMS
0

ZONING
R20 RESIDENTIAL 20,000 CU

HISTORICAL SUMMARY

Situated near the residential neighborhood of Sylvan Hills in West Portland, the East Sylvan Middle School was built in 1933. The Colonial Revival style school building rests at the crest of a hill on a mostly grass-covered campus. The main wing of the school is located in the upper story with additional classrooms located in a daylight basement. On the lower level of the school, a single story attached wing projects to the north. The modified L-shaped mass of the building is covered with cross-hip roofs. Clad with red brick, the wood frame building sits on a poured concrete basement. The school facilities include classrooms, a gymnasium/ cafeteria, a library and computer lab, and an administrative office. The entry to the school is from the east on SW 58th Avenue. Recreational facilities on the campus consist of playfields that are situated to the west (rear) and north of the school. A driveway encircles the north and east sides of the school. An asphalt-covered parking area is located to the south of the school.

While the building is associated with a prominent architect and features some characteristic elements of schools designed in the early twentieth century, several alterations have diminished the building's integrity of materials, design, and feeling. Due to this loss of integrity, East Sylvan Middle School is not eligible under either NRHP Criteria A, B, or C.

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities; East Sylvan has low poverty levels compared to the district average.

» For the 2021-22 school year, 10% of students are historically underserved, below the K-8 mean (29%)
» For the 2021-22 school year, 13% of students qualified for free or reduced lunch, below the K-8 school mean (19%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, East Sylvan is forecast at 140% utilization. By the 2030-31 school year, utilization is projected to increase slightly to 143%.

FACILITY CONDITION SUMMARY

East Sylvan K-8 School is 88 years old, and in critical condition with a facility condition index (FCI) score of 0.32. As the average FCI score for K-8 schools in PPS is 0.16, the building is in significantly worse condition than most other K-8 schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The majority of the mechanical and plumbing system were aged and had exceeded their intended design lives. Signage was present throughout indicating pipe and equipment insulation contained asbestos. There were signs of an active leak in the domestic water distribution piping in Room 26B.

Fire Protection

» The fire alarm control panel and devices were upgraded in 2018 and were in good condition with no deficiencies observed.
» The main facility had a wet-pipe sprinkler system typically covering the classrooms and corridors. No major deficiencies were observed or reported with the fire protection system at the time of assessment.

Electrical

» Less than half of the distribution panel boards had exceeded design life. The 400-amp switchboard in the compressor room had exceeded design life.

Arch/Struct/Site

» The wood window frames and trim have flaking paint and cracked sealant.
» There were a few cracked glass blocks on the west exterior.
» Minor cracking was observed on most concrete exterior walls.
» Stains on brick beneath windows indicate water may not be draining properly.
» Interior stair treads were heavily worn.

RECENT CAPITAL EXPENDITURES

» Select Auditorium/Stage Upgrades in 2017
» Drinking Fountain Fixture Replacements in 2021

EDUCATIONAL SUITABILITY

» The spatial configuration of some of the general classrooms does not align with the instructional program.
» The school lacks purposely designed special education spaces.
» A dedicated music room is not present.
» The school does not have a dedicated art classroom.
» A small cafegymatorium is present.
» The school site lacks appropriate fencing.
» The main office does not have remote control of the main entry doors.
» The library media center is located in a converted general classroom; it is undersized.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
» Re-purpose space to create an art exhibition area.
» Security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.

- » Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.
- » Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.

Moderate Priority

- » Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
- » Re-purpose an existing space into a wellness room.
- » Allocate an area for a Reconnection Services office.
- » Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- » Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- » Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- » Expand P.E. storage by repurposing space and/or adding casework.
- » Allocate instructional, office, and meeting space for Virtual Scholars.

FAUBION K-8 SCHOOL

ADDRESS
3039 NE ROSA PARKS WAY

CONSTRUCTION DATE
2016 (PRIMARY)

LEVELS
3

BLDG AREA
170,638 SF

SITE AREA
261,360 SF
6.0 ACRES

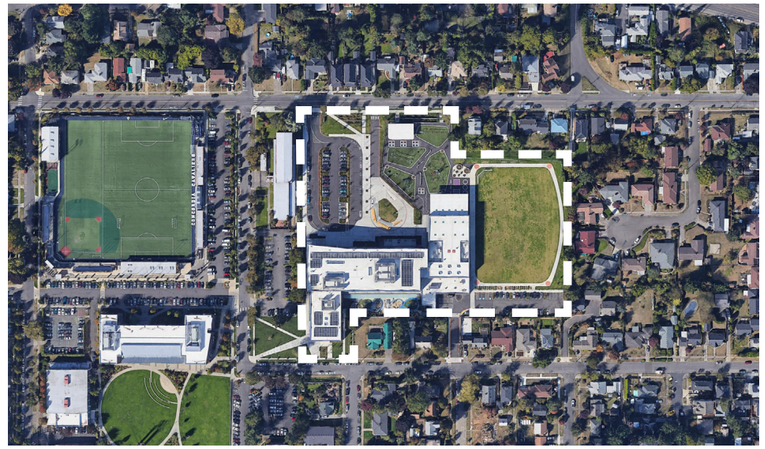
CLASSROOMS COUNT
44

FUNCTIONAL CAPACITY
710 STUDENTS

CLUSTER
JEFFERSON

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU



HISTORICAL SUMMARY

The Faubion K-8 School has undergone a modernization program and is a new building.

Faubion K-8 School is situated in the Concordia neighborhood of Northeast Portland. The campus occupies portions of two city blocks between NE Portland Street on the south and NE Dekum Street on the north. The school is located on the west end of the campus. Parking is to the south, the playground is to the north, and play fields are to the east. The formal entrance to the building is from N.E. Dekum. However, the NE Rosa Parks Way entrances are used often since parking is located along this end of the building. Residential buildings provide a buffer between NE Rosa Parks Way and the school campus.

Faubion Elementary School is not eligible under either NRHP Criteria A, B, or C.

RESJ CONSIDERATIONS

Faubion School has multiple attributes that place it in a high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals..

- » For the 2021-22 school year, 72% of students are historically underserved, more than double the K-8 school mean (29%).
- » For the 2021-22 school year, 44% of students qualified for free or reduced lunch, more than double the K-8 school mean (19%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Faubion K-8 School is forecast at 101% utilization. By the 2030-31 school year, utilization is projected to decrease to 98%.

FACILITY CONDITION SUMMARY

Faubion K-8 School is five years old, and in good condition with a facility condition index (FCI) score of 0.0. As the average FCI score for K-8 schools in PPS is 0.16, the building is

in significantly better condition than other K-8 schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The HVAC and plumbing systems and equipment were renovated in 2016 and had no deficiencies observed.

Fire Protection

» Due to the 2016 full renovation, no major deficiencies were observed.

Electrical

» Due to the 2016 full renovation, no major deficiencies were observed.

Arch/Struct/Site

» Due to the 2016 full renovation, no major deficiencies were observed.

RECENT CAPITAL EXPENDITURES

No recent projects, as Faubion was constructed in 2016.

EDUCATIONAL SUITABILITY

» As a newer school building, Faubion was designed based on the district's Educational Specifications. As such, its educational suitability rating is very high.

EDUCATIONAL PROGRAM

FORECAST

High Priority

» Re-purpose space to create an art exhibition area.
» Security upgrades (as needed).
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.

Moderate Priority

» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

LAURELHURST K-8 SCHOOL

ADDRESS
840 NE 41ST AVE

CONSTRUCTION DATE
1923 (PRIMARY)

LEVELS
2

BLDG AREA
59,239 SF

SITE AREA
126,760 SF
2.91 ACRES

CLASSROOMS COUNT
31

FUNCTIONAL CAPACITY
657 STUDENTS

CLUSTER
GRANT

MODULAR CLASSROOMS
8

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Situated in the Laurelhurst neighborhood of East Portland, the 1923 Laurelhurst K-8 School consists of a two-story, reinforced concrete with brick veneer building and a single story wood structure constructed in 1951 and added onto in 1968. Laurelhurst K-8 School is ornamented with quoins, decorative brickwork, and terra cotta belt courses and geometric details. Other details include a central entrance pavilion with terra cotta cartouche and entry surround. Bands of aluminum windows and arched multi-light windows with terra-cotta keystones provide the primary fenestration. The building is capped by a flat roof with a terra cotta capped parapet. Double loaded corridors provide access to the administrative offices, classrooms, and recreation spaces.

The neighborhood consists of a mix of single family residences built primarily between 1910 and 1950. The primary entrances to the school are from NE 41st Street. Play areas and open space occupy the eastern end of the campus. Located to the northeast of the primary building is a 1951 single story annex with flat roof and wood shingle and brick veneer siding. A two room portable with flat roof and plywood walls was added to the east end of the annex in 1968.

The school is neither an exemplar of the Colonial Revival style nor does it retain a level of historical integrity commensurate with other Portland Elementary Schools constructed during the same period and is therefore not eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Laurelhurst serves a less diverse student population with relatively low poverty levels compared to the district average.

» For the 2021-22 school year, 14% of students are historically underserved; this is less than half the K-8 school mean (29%).
» For the 2021-22 school year, 6% of students qualified for free or reduced lunch, well below the K-8 school mean (19%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Laurelhurst is forecast at 106% utilization. By the 2030-31 school year, utilization is projected to decrease to 99%.

FACILITY CONDITION SUMMARY

Laurelhurst K-8 School is 98 years old, and in poor condition with a facility condition index (FCI) score of 0.11. As the average FCI score for K-8 schools in PPS is 0.16, the building is in comparatively better condition than most other K-8 schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The majority of the plumbing fixtures had exceeded their design lives. The domestic water distribution equipment was recently replaced.
» The vast majority of the heating equipment, air handlers, exhaust fans, and associated equipment had exceeded their design lives.

Fire Protection

» The building did not have a sprinkler system.
» An addressable fire alarm system headend (Potter PFC-6800) and associated detection and signal devices had been installed within the last year.

Electrical

» The site's main distribution switchboard was original to the building and had exceeded its design life. In 1998, a new sub-distribution had been added that in turn serves the building's panel boards. The majority of these panel boards were observed to have exceeded their respective design lives, though several had been installed in the last 20 years (including two as part of the telecommunications upgrade in 1997). A generator had been installed in 2002.

Arch/Struct/Site

» The exterior wood windows were aged beyond typical design life.
» The majority of interior architectural components had exceeded design life.

RECENT CAPITAL EXPENDITURES

» ADA Upgrades in 2019
» Fire Alarm Upgrades in 2020
» Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

» There are some open style classrooms which are used to supplement traditional instructional spaces.
» General classrooms average 80% of the size guideline.
» All Kindergarten classrooms are located in portables.
» The SPED classroom is undersized (68% of standard).
» The school has a small science lab (73% of size standard).
» The art room is undersized (61% of size standard).
» The school lacks a dedicated music room.
» The school has a small gym (61% of size standard) and a separate PE activity room that is approximately 1,286 SF.
» The school has a multipurpose cafetorium with dated finishes.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Re-purpose space to create an art exhibition area.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
» Re-purpose existing space to provide a dedicated music classroom configured and

equipped per current Ed Specifications.

Moderate Priority

» Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

SKYLINE K-8 SCHOOL

ADDRESS
11536 NW SKYLINE BLVD

CONSTRUCTION DATE
1939 (PRIMARY)

LEVELS
2

BLDG AREA
38,327 SF

SITE AREA
254,390 SF
5.84 ACRES

CLASSROOMS COUNT
14

FUNCTIONAL CAPACITY
282 STUDENTS

CLUSTER
LINCOLN

MODULAR CLASSROOMS
0

ZONING
RES RURAL ZONING
EFU EXCLUSIVE FARM USE

HISTORICAL SUMMARY

Situated on the rural fringes of Northwest Portland, Skyline School is located on NW Skyline Road. Built in 1939, the school building is situated on a mostly grass-covered campus. Additional structures on the parcel include a covered playshed located to the northwest of the main building and a garage building to the north. The school exhibits Minimal Traditional detailing. The modified U-shaped building is covered by a hipped roof and rests on a poured concrete foundation. The building is single story with a daylight basement. Cladding for the wood framing building consists of a mixture of brick veneer and vertical board siding. The school facilities include classrooms, a gymnasium, a library, and a cafeteria.

Development in the surrounding area is sparse with many large suburban residences set into the hills overlooking the Tualatin Valley. The building sits at the crest of a hill with playfields located on a terrace below the main level of the building. Additional grass covered play areas are located to the south and east of the school. An asphalt covered parking lot is situated on the east side of the school.

Skyline School is recommended as eligible for the National Register of Historic Places (NRHP) under Criterion A for its associations with the growth of the Portland Public School district in the rural fringes of the city by the mid twentieth century.

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Skyline serves a less diverse student population with relatively low poverty levels compared to the district average.

» For the 2021-22 school year, 12% of students are historically underserved; this is less than the K-8 school mean (29%).
» For the 2021-22 school year, 7% of students qualified for free or reduced lunch, well below the K-8 school mean (19%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Skyline K-8 School is forecast at 75% utilization. By the 2030-31 school year, utilization is projected to increase slightly to 76%.

FACILITY CONDITION SUMMARY

Skyline K-8 School is 82 years old, and in poor condition with a facility condition index (FCI) score of 0.18. As the average FCI score for K-8 schools in PPS is 0.16, the building is in slightly worse condition than many K-8 schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the plumbing fixtures had exceeded typical design life.
- The domestic water piping and sanitary waste piping was assumed to be original and had assumed to have exceeded typical design life.
- Both of the water heaters and the boiler had exceeded typical design life.
- The air handling unit and supply/exhaust fans had exceeded typical design life.
- The classroom ventilators and heaters had exceeded typical design life.
- The pneumatic controls and associated air compressor had exceeded typical design life

Fire Protection

- The fire alarm control panel and alarm devices were in good condition and had no deficiencies observed.
- The fire suppression system had exceeded its design life.

Electrical

- The main distribution switchgear and eight of the distribution panels had exceeded typical design life.
- The interior lighting was approaching the end of typical design life.
- The natural gas generator and associated automatic transfer switch had exceeded typical design life.
- School custodian and Principal reported that the backup generator is insufficient. Power outages are common and the generator can only power lights. No heat is provided when the children are waiting to be picked up. There is also no potable water during power outages because the school is on a well.

Arch/Struct/Site

- The windows in classrooms 109 and 110 were damaged and no longer opened. The windows were part of the emergency egress plan for students.
- The exterior doors were aged beyond design life. They had areas of damage and were beginning to warp and not properly seal.
- The majority of interior architectural components had exceeded design life.
- The asphalt surfaces had large areas of alligator cracking.

RECENT CAPITAL EXPENDITURES

- Radon Mitigation in 2018
- Select Flooring Replacements in 2018
- Stair Replacement in 2019
- Replacement of Damaged Ceiling Tiles in 2019

EDUCATIONAL SUITABILITY

- The school has no designed spaces to accommodate differentiated learning or grouping patterns.
- The room finishes are worn/dated with old window blinds and cabinetry.
- Most general classrooms meet approximately 78% of the size standard.
- The school lacks purposely designed special education spaces.
- The music room is located in an inaccessible basement and only meets approximately 50% of the size standard.
- A science lab is present.
- The school lacks a dedicated art room.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Add or re-purpose space for a structured movement room (2,000 SF) to support P.E. instruction. If space for a structured movement area is unavailable, construct an additional covered play structure.
- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications. Music is currently held in a small basement area.
- Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln.

Moderate Priority

- Construct a new gymnasium.
- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

SUNNYSIDE K-8 SCHOOL

ADDRESS
3421 SE SALMON ST

CONSTRUCTION DATE
1925 (PRIMARY)

LEVELS
2

BLDG AREA
56,245 SF

SITE AREA
135,036 SF
3.1 ACRES

CLASSROOMS COUNT
27

FUNCTIONAL CAPACITY
546 STUDENTS

CLUSTER
FRANKLIN

MODULAR CLASSROOMS
2

ZONING
OS OPEN SPACE CU

HISTORICAL SUMMARY

Sunnyside K-8 School is situated in the primarily single-family residential Sunnyside neighborhood of Southeast Portland. Built in 1925, the two-story school building with a ground floor basement has a reinforced concrete structure and is covered with brick veneer. The exterior is distinguished by its Classical Revival style cast stone and terra cotta ornamentation. The building's irregular shaped plan includes classrooms, an auditorium, a gymnasium, a cafeteria, a library, and an administrative office.

The school building faces SE Salmon Street, and is situated on a campus covered with a mixture of grass and asphalt. East of the school parcel is Sunnyside School Park, a City/School distinct joint-use property maintained by the City of Portland which contains playgrounds and play fields. An extensive garden is situated along the front elevation. The primary entrance to the building is on SE Salmon Street.

Due to the loss of integrity, Sunnyside K-8 School is not eligible under either NRHP Criteria A, B, or C.

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Sunnyside serves a less diverse student population with relatively low poverty levels compared to the district average.

- For the 2021-22 school year, 21% of students are historically underserved; this is less than the K-8 school mean (29%).
- For the 2020-21 school year, 17% of students qualified for free or reduced lunch, slightly below the K-8 school mean (19%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Sunnyside K-8 School is forecast at 96% utilization. By the 2030-31 school year, utilization is projected to decrease significantly to 77%.

FACILITY CONDITION SUMMARY

Sunnyside K-8 School is 96 years old, and in poor condition as with a facility condition index (FCI) score of 0.16. As the average FCI score for K-8 schools in PPS is 0.16, the building is typical of most K-8 schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the plumbing fixtures had exceeded their design lives.
- The vast majority of the steam heating equipment, exhaust fans, air handling units, and associated equipment had exceeded their design lives.

Fire Protection

- The building was sprinkled in a single room. The piping was estimated to be original to the building and had exceeded its typical design life.
- The fire alarm control panel (Silent Knight 5207) and associated detection and signal devices were installed in 1997 and had exceeded its typical design life.
- The fire alarm control panel and alarm devices were in good condition and had no deficiencies observed.
- The fire suppression system had exceeded its design life.

Electrical

- The site's main distribution switchboard had been replaced in 1998. A majority of the panel boards in the building had also been either replaced or added within the last 20 years. Five panel boards, however, appeared to be original to the building and had exceeded their design lives. A generator had been installed at the school in 1998.

Arch/Struct/Site

- The roof coverings of the main building had areas of ponding, degranulating and debris buildup. Infrequent leaks were reported.
- The asphalt shingle roof at the portable had a section of damaged shingles at the roof peak.

RECENT CAPITAL EXPENDITURES

- Exterior Fencing Extension in 2017-18
- Sink Hole Repairs in 2020
- Replacement of Auditorium Carpet in 2020
- Drinking Fountain Fixture Replacements in 2021

EDUCATIONAL SUITABILITY

- Classroom sizes are smaller than the size standard.
- The school lacks purposely designed special education spaces.
- A general classroom is used as a science classroom.
- There is not a dedicated music room at this school.
- The art classroom is undersized (70% of standard) and poorly configured.
- The gym is greatly undersized (50% of space standard).
- The library media center is undersized with worn finishes.
- The site is not fenced. The main entrance is not easily supervised.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Re-purpose space to create an art exhibition area.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.

Moderate Priority

- Add an outdoor covered play structure or construct/re-

purpose a structured movement room (2,000 SF) to support P.E. instruction.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

VERNON K-8 SCHOOL

ADDRESS
2044 NE KILLINGSWORTH ST

CONSTRUCTION DATE
1931 (PRIMARY)

LEVELS
3

BLDG AREA
70,833 SF

SITE AREA
162,914 SF
3.74 ACRES

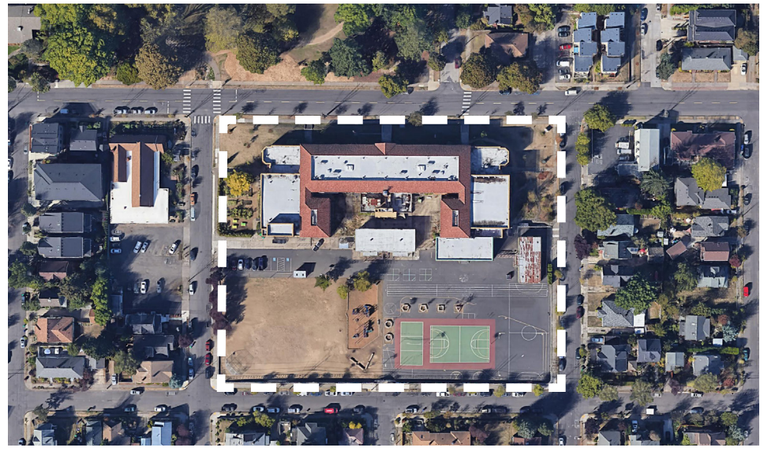
CLASSROOMS COUNT
25

FUNCTIONAL CAPACITY
579 STUDENTS

CLUSTER
JEFFERSON

MODULAR CLASSROOMS
4

ZONING
R2.5 RESIDENTIAL 2,500 CU



HISTORICAL SUMMARY

Vernon K-8 School is located in Northeast Portland. Aligned on an east-west axis, the two story school building is situated at the north end of the campus. Wood frame "portables" located at the south and east side of the main building provide additional classroom space. The 1931 reinforced concrete structure, faced with variegated brick, rests on a poured concrete foundation. A hipped roof, clad with red pantiles, covers the central mass of U-shaped building. The remaining bays of the irregular shaped school facility are covered by flat roofs with a parapet. Designed in a modified Georgian style, cast stone is utilized to divide the elevations horizontally and to distinguish significant architectural spaces on the exterior elevations. Fenestration consists of a mixture of grouped metal frame and wood frame windows. The surrounding neighborhood consists primarily of single family residences. Much of the neighborhood had been developed by the 1920s, but the area continued to experience growth through the 1950s.

Vernon K-8 School does not retain a level of historical significance and integrity commensurate with other Portland Elementary Schools constructed of similar styles during the same period and is therefore not eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Vernon's student population is largely reflective of district-wide averages for K-8 schools:

» For the 2021-22 school year, 38% of students are historically underserved, more than the K-8 school mean (29%).
» For the 2020-21 school year, 25% of students qualified for free or reduced lunch, slightly above the K-8 school mean (19%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Vernon K-8 School is forecast at 106% utilization. By the 2030-31 school year, utilization is projected to

decrease to 97%.

FACILITY CONDITION SUMMARY

Vernon K-8 School is 90 years old, and in poor condition with a facility condition index (FCI) score of 0.18. As the average FCI score for K-8 schools in PPS is 0.16, the building is in slightly worse condition than many K-8 schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the plumbing fixtures had exceeded their design lives. The domestic water distribution equipment was nearing the end of typical design life.
- The vast majority of the steam heating equipment, exhaust fans, air handling units, controls and associated equipment had exceeded their design lives.

Fire Protection

- The building was partially sprinklered.
- An addressable fire alarm system headend (Silent Knight SK-5208) and associated detection and signal devices were installed (estimated) in 2005.
-

Electrical

- The site's main distribution switchboard was replaced in 1998 and had no major deficiencies. The majority of the school's panel boards, however, appeared to be installed in 1979 and had exceeded their design lives. The original main distribution switchboard appeared to be re-fed from the new main distribution panel board and had exceeded its design life. Three panel boards had been installed in 1997 as part of a technology upgrade and had no major deficiencies. A generator had been installed in 2000 and had no major deficiencies.

Arch/Struct/Site

- One skylight on the main building roof over the boiler room appeared to be original to the building and had corroded frames, broken glazing and deteriorated sealant.
- The carpet floor finish in the main building was aged and had excessive wear in high traffic areas.
- The painted concrete floor finish in the main building was aged and had excessive wear and chipping.
- The wood cabinet casework in Portable 1 was aged and had aged and damaged hardware.
- The suspended acoustic panel ceiling in Portable 2 was aged and had discolored frames and mismatched, damaged, and dirty panels.

RECENT CAPITAL EXPENDITURES

- Installation of Climbing Wall in Gym in 2017
- Boiler Reinsulate in 2018
- Radon Mitigation in 2018
- HVAC Repairs in 2017-18
- Conversion of Courtyard to Outdoor Learning Center in 2020
- Asbestos Mitigation in 2020
- Fire Alarm Upgrades in 2020
- Drinking Fountain Fixture Replacements in 2020

EDUCATIONAL SUITABILITY

- Classrooms are generally undersized. Kindergarten classrooms are open with a shared ex space between them causing significant noise interference.
- The SPED classroom is significantly undersized (54% of size standard) and lacks a restroom.
- One small science classroom is present.
- Music and art are each taught in portable buildings.
- One small gym is present (51% of size standard).
- The library media center is small and uninviting.
- The main office does not have remote control of the main entry doors.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Re-purpose space to create an art exhibition area.
- Re-purpose an existing space into a sensory motor room.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
- Create an outdoor learning area to support STEM instruction and project-based learning.
- Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
- Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications. Music is currently taught in a portable classroom.
- Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln. Art is currently taught in a portable classroom.

Moderate Priority

- Add an outdoor covered play structure or construct/re-purpose a structured movement room (2,000 SF) to support P.E. instruction.
- Re-purpose an existing space into a wellness room.
- Allocate an area for a Reconnection Services office.
- Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
- Invest in facilities upgrades to support project-based learning activities.

Lower Priority

- Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

WINTERHAVEN K-8 SCHOOL

ADDRESS
3830 SE 14TH AVE

CONSTRUCTION DATE
1930 (PRIMARY)

LEVELS
2

BLDG AREA
41,345 SF

SITE AREA
213,444 SF
4.9 ACRES

CLASSROOMS COUNT
15

FUNCTIONAL CAPACITY
261 STUDENTS

CLUSTER
CLEVELAND

MODULAR CLASSROOMS
1

ZONING
OS OPEN SPACE CU

HISTORICAL SUMMARY

Winterhaven School (formerly Brooklyn), is located in the Brooklyn neighborhood of Southeast Portland. The campus includes the L-shaped school building and a detached portable classroom.

Faced with variegated brick, the reinforced concrete building rests on a poured concrete foundation. Two bays project slightly from the west elevation to create a slight enclosure for the entry. The entry door is flanked by engaged pilasters and exhibits a wood window with a cast stone surrounded with bottom scrolls. Designed in the Mediterranean-Revival style, cast stone architectural details are located throughout the building and include cast stone coping, water table, and scroll work above the primary entry door. A brick chimney projects above the east elevation. Fenestration consists primarily of six-over-six, wood frame windows.

Asphalt covered play areas on the east side of the school connect to the larger open spaces of Brooklyn School Park. Development in the surrounding neighborhood consists primarily of single family residences built between 1928- 1950.

Winterhaven K-8 School retains a high degree of integrity and is therefore eligible for the National Register of Historic Places.

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Winterhaven serves a less diverse student population with relatively low poverty levels compared to the district average.

» For the 2021-22 school year, 8% of students are historically underserved; this is less than the K-8 school mean (29%).
» For the 2021-22 school year, 8% of students qualified for free or reduced lunch, significantly below the K-8 school mean (19%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Winterhaven K-8 School is forecast at 112% utilization. By the 2030-31 school year, utilization is projected to decrease to 108%.

FACILITY CONDITION SUMMARY

Winterhaven K-8 School is 91 years old, and in poor condition with a facility condition index (FCI) score of 0.19. As the average FCI score for K-8 schools in PPS is 0.16, the building is in slightly worse condition than many K-8 schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The majority of the plumbing fixtures had exceeded their design lives.
» The domestic water distribution equipment was recently replaced and is in good condition.
» The vast majority of the steam heating equipment, exhaust fans, air handling units, fan coil units, controls and associated equipment had exceeded their design lives.

Fire Protection

» A fire sprinkler system was not observed in the building.
» The fire alarm control panel (Silent Knight 5207) and associated detection and signal devices were installed in 2005.

Electrical

» The site's main distribution switchboard was installed in 1989 which puts it at the very end of its design life.
» Three panel boards had exceeded their design lives, while two (B1 and B2) had been replaced more recently, and panel boards IT1 and IT2 had been added with the telecommunications upgrade in 1997.

Arch/Struct/Site

» The wood window frames were deteriorated on the main building and north addition.
» The built-up roof was cracked and blistered.
» The roof hatch had worn springs, missing seals, and aged hardware.
» The majority of interior architectural components were nearing the end of design life.
» There were roof leaks in the north addition in the corridor below roof drains and in room 10. There were also stained ceiling tiles in these areas.

RECENT CAPITAL EXPENDITURES

» Sidewalk/Curb Replacement in 2018
» Refinished Gym Floor in 2018
» Lead Paint Abatement in 2018
» Select Auditorium Upgrades in 2019
» Drinking Fountain Fixture Replacements in 2021

EDUCATIONAL SUITABILITY

» While the facility is dated there are updated instructional spaces that provide for flexibility.
» Classrooms in the original building range from meeting 70 - 90% of the size standard. Those in the north addition meet the standard.
» Kindergarten classrooms do not have adjacent dedicated restrooms.
» The school lacks purposely designed special education spaces.
» The science room has perimeter lab stations and good cabinetry.
» Art is located in a portable classroom.
» There is not a dedicated music room at this facility.
» A cafegymatorium is present, limiting scheduling and use of the space.
» Minimal fencing is present.
» The main office is not able to effectively supervise the main entry and does not have remote control of the doors.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Add or re-purpose space for a structured movement room (2,000 SF) to support P.E. instruction. If space for a structured movement area is unavailable, construct an additional covered play structure.
» Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
» Re-purpose space to create an art exhibition area.
» Security projects, including new classroom door locks and

improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Provide new flexible classroom furnishings and student seating options to allow teachers to easily reconfigure spaces to accommodate a variety of activities.
» Create an outdoor learning area to support STEM instruction and project-based learning.
» Renovate an existing space to provide a minimum of one (1) multipurpose SPED focus classroom, equipped with and an accessible restroom per the district's Educational Specifications.
» Re-purpose existing space to provide a dedicated music classroom configured and equipped per current Ed Specifications.
» Facilities upgrades to provide a dedicated visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln. Art is currently taught in a portable classroom.

Moderate Priority

» Construct a new gymnasium.
» Re-purpose an existing space into a wellness room.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with the district's Educational Specifications. This may require renovation and/or relocation of the main office to provide direct visual supervision of the main entry.
» Invest in facilities upgrades to support project-based learning activities.

Lower Priority

» Modernize school to support new approaches to teaching and learning, emphasizing project-based learning, differentiated instruction, collaboration, and team teaching.
» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

MIDDLE SCHOOLS

BEAUMONT MIDDLE SCHOOL

ADDRESS
4043 NE FREMONT ST

CONSTRUCTION DATE
1926 (PRIMARY)

LEVELS
2

BLDG AREA
91,294 SF

SITE AREA
249,163 SF
5.72 ACRES

CLASSROOM COUNT
34

FUNCTIONAL CAPACITY
701 STUDENTS

CLUSTER
GRANT

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Situated in the Beaumont-Wilshire neighborhood of East Portland, the Beaumont Middle School campus consists of a 1926 U-shaped building with two detached additions that house classrooms and recreation space. The primary two-story Classical Revival building is constructed of concrete with brick veneer and ornamented by a cast-stone façade with shield motif. Double loaded corridors provide access to the administrative offices, classrooms, and recreation spaces.

The neighborhood consists of a mix of commercial and single family residences built primarily between 1920 and 1950. Play areas and open space occupy the western end of the campus.

To the west of the main building is a single-story brick veneer building (1989) that houses a gym/auditorium, cafeteria, and art room; the two buildings—the 1929 primary building and the 1989 gymnasium/cafeteria building—are connected by a covered walkway.

Beaumont Middle School does not retain a level of historical integrity commensurate with other Portland schools constructed during the same period and is therefore not eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Facility improvements to Beaumont would be somewhat impactful underserved communities as RESJ indicators are similar to district averages.

- For the 2021-22 school year, 40% of Beaumont's students are historically underserved, slightly below the middle school mean (37%).
- For the 2021-22 school year, 19% of Beaumont students qualified for free or reduced lunch, below the middle school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Beaumont is forecast at 75% utilization. By the 2030-31 school year, enrollment is projected to decline to 61%. Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Beaumont is nearly a century old and in poor condition with a facility condition index (FCI) score of 0.12. As the mean FCI score for non-modernized middle schools in PPS is 0.12, the Beaumont building is in typical condition to many of the middle schools in the district.

Facility condition assessment conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the plumbing fixtures had exceeded their typical design lives. A portion of the domestic water distribution was replaced; however, many of the existing plumbing fixtures were noted to have lead present in the system and the water is not safe for consumption.
- The vast majority of the steam heating equipment, exhaust fans, air handling units, and associated equipment had exceeded their typical design lives. Many of the perimeter steam heating units in classrooms were not functioning due to age.

Fire Protection

- The building was observed to have a wet-pipe sprinkler system providing coverage of approximately 50% of the overall building. The piping and sprinkler heads were estimated to be original to the building and had exceeded their typical design life.
- A new addressable fire alarm system headend (Potter PFC-6800) and associated detection and signal devices were installed in 2019.

Electrical

- The majority of the site's electrical distribution system had exceeded its typical design life. The building's main distribution switchboard was upgraded in 1997. The original switchboard, however, had been installed in 1950 was still in service – having been back-fed from the new switchboard.

Arch/Struct/Site

- The roof over the gymnasium in the main building had concrete faced insulated panel roofing over a built-up roof covering. There were many broken and displaced insulated panels and organic growth throughout this section of roof.
- The built-up roof covering of the Industrial Arts building had wrinkling and blistering throughout, top coat cracking throughout, and several areas that had been patched.
- The remaining exterior architectural components are planned for future assessment.
- The aged vinyl composition tile had worn surfaces and was cracked and chipped in several locations.
- The painted and sealed concrete finishes had excessive wear and chipping especially in the boiler room.
- The carpet floor finish had excessive wear and staining throughout, and torn carpet seams in the library had been patched with duct tape.

RECENT CAPITAL EXPENDITURES

- Parking lot re-striping in 2019
- Fire alarm upgrades in 2020
- Drinking fountain fixture replacements in 2020
- Re-roofed modular building in 2020
- Library carpet replacement in 2020
- Electrical improvements in one room in 2020
- ADA upgrades (cafeteria door) in 2020
- Asbestos abatement in 2021

EDUCATIONAL SUITABILITY

- Beaumont's classrooms are undersized; most general classrooms are 70% of the size standard..
- Some of the science labs are also undersized with insufficient sinks.
- Band is held in a modular classroom.
- SPED classrooms lack adjacent, dedicated accessible restrooms.
- The administrative offices are not located near the main entry, creating supervision and access control challenges.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Addition of accessible and age-

appropriate play equipment and a covered play structure.
» Add flexible furnishings to support student collaboration.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms and locker rooms.
» Re-purpose space to create an art exhibition area.
» Security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.

Moderate Priority

» Re-purpose an existing space into a wellness room.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Allocate an area for a Reconnection Services office.
» Renovate main entry to align with district's updated Ed Specs.
» Relocate main office so that it is adjacent to the main entry.
» Re-purpose space to provide a dedicated security office.
» Re-purpose space for a 2nd visual arts classroom, providing separate teaching stations for 2D and 3D visual arts instruction.
» Add or re-purpose space for separate band and choir rooms with shared ensemble/practice rooms, music office, and music library. (Note: school currently only has one music room and it is located in a modular building)
» Upgrades to existing stage and/or small drama classroom to create a flexible performance area.
» Add a makerspace to support STEAM activities in alignment with CTE pathways at the high school level.

Lower Priority

» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.
» Athletic upgrades including the addition of new turf field with a track. (Note: aux gym is present)

DA VINCI MIDDLE SCHOOL

ADDRESS
2508 NE EVERETT ST

CONSTRUCTION DATE
1928 (PRIMARY)

LEVELS
3

BLDG AREA
88,659 SF

SITE AREA
435,600 SF
10.0 ACRES

CLASSROOM COUNT
25

FUNCTIONAL CAPACITY
714 STUDENTS

CLUSTER
GRANT

MODULAR CLASSROOMS
6

ZONING
R2.5 RESIDENTIAL 2,500 CU

HISTORICAL SUMMARY

The Girl's Polytechnic High School (now known as da Vinci Arts Middle School) is a multi-story reinforced concrete structure with brick cladding designed in the Classical Revival style. The building is covered by a flat roof. The campus consists of a T-shaped building and four portable classroom buildings. Constructed in 1927, the school exhibits extensive use of cast-stone ornamentation to express its Classical Revival style.

The school features one and two-story projecting bays, as well as single and paired six-over-six double hung wood sash windows that are arranged symmetrically. The middle bay of the front façade, trimmed with recessed cast-stone balustrades and decorative panels, extrudes slightly from the rest of the building. The main portal protrudes off its face and is accented with Tuscan columns and a portico topped by an entablature.

Da Vinci Arts School is located in the Kerns neighborhood of Northeast Portland. The neighborhood consists of a mix of single family residences, multi-story apartments, and commercial and industrial buildings built primarily between 1920 and 1950. The da Vinci Arts campus occupies two-and-one-half city blocks and part of the NE 26th Avenue right-of-way. The school is located on the northwest end of the campus and play areas and open space are on the southwest and east end of the campus. Parking is provided along the west (side) and south (rear) elevations of the school building. Four portable buildings are located to the south of the primary building.

The 1927 Classical Revival school is recommended as eligible for the National Register of Historic Places (NRHP) for its association with progressive era public school, particularly trade school, construction in Portland (Criterion A).

RESJ CONSIDERATIONS

Facility improvements to da Vinci would be less impactful to

underserved communities.

- For the 2021-22 school year, 28% of da Vinci's students are historically underserved, well below the middle school mean (37%).
- For the 2021-22 school year, 15% of da Vinci students qualified for free or reduced lunch; this is below the middle school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, da Vinci is forecast at 63% utilization. Stable enrollment levels are forecasted over the next decade, with a utilization rate of 64% projected by the 2030-31 school year.

FACILITY CONDITION SUMMARY

da Vinci Middle School is 93 years old and in poor condition with a facility condition index (FCI) score of 0.11. As the average FCI score for non-modernized middle schools in PPS is 0.12, the building is in similar condition than most middle schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the plumbing fixtures had exceeded their design lives.
- The domestic water distribution equipment was in good condition.
- The vast majority of the heating and cooling equipment, exhaust fans, and associated equipment had exceeded their design lives.

Fire Protection

- A fire sprinkler system was not observed in the building.
- A new addressable fire alarm system headend (Potter PFC-6800) and associated detection and signal devices were installed in 2019.

Electrical

- The site's electrical distribution system (including main switchboard and panel boards) had exceeded its intended design life.
- The panel boards in the portable/industrial art buildings have also exceeded their design lives.

Arch/Struct/Site

- A portion of the parapet flashing on the roof was loose and had torn off.
- The exterior stairs were observed with moderate cracking.
- The sheet vinyl flooring was observed with excessive wear and with chipped pieces.
- The carpet in the main office was observed with excessive wear.
- The exterior wall panels of Portable A had moderate denting.
- The wood exterior walls of Portable B were deteriorated.
- The wood frames and sealant of Portable E were heavily degraded. The roof was observed with missing tiles and organic growth.
- The majority of architectural components were nearing or had exceeded the end of design life.

RECENT CAPITAL EXPENDITURES

- Asbestos abatement in stairwell (floor tiles) in 2018
- Sewer work in 2019
- Added foundation to modular building in 2020
- Drinking fountain fixture replacements in 2021

EDUCATIONAL SUITABILITY

- Music is held in a small general classroom.
- Art class is held in a modular building.
- The gym is undersized.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Addition of accessible and age-appropriate play equipment.
- Add flexible furnishings to support student collaboration.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms and locker rooms (once finalized).
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.

Moderate Priority

- Re-purpose an existing space into a wellness room.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Allocate an area for a Reconnection Services office.
- Renovate main entry to align with district's updated Ed Specs. This may require renovating main office to improve visual and/or physical connection to the main entry.
- Re-purpose space to provide a dedicated security office.
- Re-purpose space to create two (2) visual arts classrooms, providing separate teaching stations for 2D and 3D visual arts instruction. (Note: art is currently taught in a modular building)
- Add or re-purpose space to create two separate band and choir rooms with shared ensemble/practice rooms, music office, and music library. (Note: music is currently taught in a general classroom)
- Upgrades to existing stage / auditorium (as needed) to support performing arts instruction.
- Add a makerspace to support STEAM activities in alignment with CTE pathways at the high school level.

Lower Priority

- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

GEORGE MIDDLE SCHOOL

ADDRESS
10000 N BURR AVE

CONSTRUCTION DATE
1950 (PRIMARY)

LEVELS
1

BLDG AREA
76,142 SF

SITE AREA
315,810 SF
7.25 ACRES

CLASSROOM COUNT
31

FUNCTIONAL CAPACITY
617 STUDENTS

CLUSTER
ROOSEVELT

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Built in 1950, the Northwest Regional style George Middle School building is situated on a grass and asphalt-covered campus. The single story wood frame building is clad with brick veneer. The irregular shape plan building provides facilities for classrooms, a gymnasium, an auditorium, a media center, a cafeteria and an administrative office. Situated in a primarily residential area adjacent to the St. Johns neighborhood of North Portland the George Middle School, which faces North Burr Avenue, is built in the style of many post-World War II schools, with projecting "fingers" and courtyard. The asphalt-covered playground and playfields are located directly east and southeast of the school. An asphalt-covered half-circular driveway provides access to the front (west) elevation and the parking area is situated on the northwest corner of the school property near the front entrance.

George Middle School is a good example of the finger plan type school in the Northwest Regional style that exhibits a high degree of integrity with its floor plan, roof forms, cladding, and intact interior finishes. The school is recommended as eligible for the NRHP. The school was built in response to the residential development in North Portland during PPS program of post-war construction and is eligible for the NRHP under Criterion A.

RESJ CONSIDERATIONS

George Middle School has two attributes that place it in a high priority category for facility improvements to advance the district's racial equity and social justice (RESJ) goals.

» For the 2021-22 school year, eighty-two percent (78%) of George's students are historically underserved; significantly above the middle school mean (37%).
» For the 2021-22 school year, 56% of George students qualified for free or reduced lunch; significantly above the middle school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, George is forecast at 70% utilization. Over the next several years, enrollment is projected to decline, reaching 57% by the 2030-31 school year. Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

George Middle School is 71 years old and in poor condition with a facility condition index (FCI) score of 0.13. As the average FCI score for non-modernized middle schools in PPS is 0.12, George's building is in slightly worse condition than most middle schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The majority of the plumbing fixtures had exceeded their typical design lives. The domestic water distribution equipment was recently replaced.
» The vast majority of the steam heating equipment, exhaust fans, air handling units, controls and associated equipment had exceeded their typical design lives.

Fire Protection

» An addressable fire alarm system headend (Silent Knight 5895XL) and associated detection and signal devices were installed in 2014.
» The building did not have a fire suppression system.

Electrical

» The building's main electrical switchboard had exceeded their typical design life. Most of the panel boards had also exceeded their typical design life. A sub-distribution panel board (SDP1) had been added more recently (1998), along with two subfed panel boards (IT1 and IT2) as part of a telecommunications upgrade in 1998.

Arch/Struct/Site

» The athletic lockers in the main building gymnasium had moderate damage throughout including bent doors and dents.
» The carpet floor finish in the main building had excessive wear and staining in high traffic areas.
» The wood floor in the main building gymnasium had exceeded typical design life. The whole floor was rippled with curling plank edges and there were areas of water damage from previous roof leaks.

RECENT CAPITAL EXPENDITURES

» Drinking fountain fixture replacements in 2020

EDUCATIONAL SUITABILITY

» Only two (2) science labs are present.
» Five (5) SPED rooms are provided, though none have access to a dedicated, adjacent accessible restroom.
» Music is held in a small general classroom.
» The administrative offices are located across the corridor from the main entry, creating supervision and access control challenges.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Addition of accessible and age-appropriate play equipment and a covered play structure.
» Add flexible furnishings to support student collaboration.
» Incorporate recommendations of All Gender Task Force, including restrooms and locker rooms (once finalized).
» Re-purpose space to create an art exhibition area.
» Security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.

Moderate Priority

» George MS is among several middle schools identified for athletic upgrades. This would include construction of an auxiliary gym and the addition of new turf field with a track. The aux gym should be constructed to a seismic performance level of immediate occupancy, serving as a potential community shelter in the event of a natural disaster.
» Re-purpose an existing space into a wellness room.
» Re-purpose existing space

to provide a Family Resource Center with kitchen equipment.
» Allocate an area for a Reconnection Services office.
» Renovate main entry to align with district's updated Ed Specs. This may require renovating main office to improve visual and/or physical connection to the main entry.
» Re-purpose space to provide a dedicated security office.
» Re-purpose space for a 2nd visual arts classroom, providing separate teaching stations for 2D and 3D visual arts instruction.
» Add or re-purpose space for separate band and choir rooms with shared ensemble/practice rooms, music office, and music library. (Note: school currently uses one general classroom for band instruction)
» Upgrades to existing stage / auditorium (as needed) to support performing arts instruction.
» Add a makerspace to support STEAM activities in alignment with CTE pathways at the high school level.

Lower Priority

» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

GRAY MIDDLE SCHOOL

ADDRESS
5505 SW 23RD AVE

CONSTRUCTION DATE
1952 (PRIMARY)

LEVELS
2

BLDG AREA
74,614 SF

SITE AREA
576,299 SF
13.23 ACRES

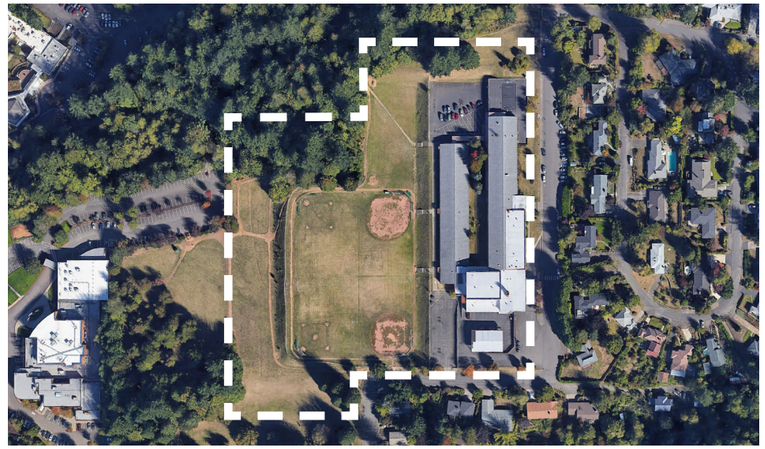
CLASSROOM COUNT
26

FUNCTIONAL CAPACITY
622 STUDENTS

CLUSTER
WELLS-BARNETT

MODULAR CLASSROOMS
0

ZONING
R7 RESIDENTIAL 7,000 CU



HISTORICAL SUMMARY

The Gray Middle School site includes the primary school building and a covered playshed. The finger type plan school building exhibits some characteristics of the International style. The wings that comprise the U-shaped building are covered by a mixture of moderately pitched gable and flat roofs. The school is set into the crest of a hill with an upper rectangular wing that faces SW 23rd Avenue.

The basement level consists of two rectangular wings joined by a crawl space. Cladding for the wood frame structure consists of a mixture of brick veneer, concrete, and horizontal board siding. The school facilities include classrooms, a gymnasium, a cafeteria, media center/library, home economics, music room, and an administrative office. Gray is situated in the Hillsdale neighborhood of Southwest Portland. Development in the surrounding neighborhood consists primarily of large residential lots set amidst the hills of Southwest Portland. Grass covered playfields are located to the north and west of the school. An asphalt-covered play area is located to the south of the school building.

Robert Gray is associated with the expansion of Portland's southwest neighborhoods in the early 1950s and the emerging educational philosophies and planning of the period, and is therefore eligible under NRHP Criterion A.

RESJ CONSIDERATIONS

Facility improvements to Gray would be less impactful to underserved communities.

» For the 2021-22 school year, 18% of Gray's students identify as BIPOC, well below the middle school mean (37%).
» For the 2021-22 school year, 9% of Gray's students qualified for free or reduced lunch, well below the middle school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Gray is forecast at 88% utilization. Over the next several years, enrollment is projected to decline, reaching 73% by the 2030-31 school year,

FACILITY CONDITION SUMMARY

Gray is 69 years old and in poor condition with a facility condition index (FCI) score of 0.15. As the average FCI score for non-modernized middle schools in PPS is 0.12, the Gray building is in worse condition than most middle schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the plumbing fixtures had exceeded their design lives. The domestic water distribution equipment was nearing the end of its typical design life.
- The vast majority of the steam heating equipment, exhaust fans, air handling units, fan coil units, controls and associated equipment had exceeded their design lives.

Fire Protection

- The building was not observed to be sprinklered.
- An addressable fire alarm system headend (Potter PFC-6800) and associated detection and signal devices had been installed within the last year.

Electrical

- The site's main distribution switchboard was replaced in 1998 and was observed to be in good condition. The majority of the school's panel boards, however, were original to the building and had exceeded their design lives. Another group had been added during the mechanical systems upgrade in the basement in 1985, and while these two had exceeded their design lives, they were observed to have been well maintained. Two panel boards had been installed in 1997 as part of the technology upgrade.

Arch/Struct/Site

- Consider structural assessment based on signs of potential structural movement and water infiltration at the north end of the building. Grading and drainage repairs had been made to remedy water intrusion but there was damage to concrete walls and stairs.
- The wood framed windows were beyond typical design life. The frames had significant degradation on the interior and exterior. Staff commented that the window frames had lead paint. Previous repairs included adding exterior metal flashing on top of the wood frames with the most damage.
- The majority of interior architectural components had exceeded design life.

RECENT CAPITAL EXPENDITURES

- Mold remediation in 2018
- Boiler repair and abatement in 2019
- Fire alarm upgrades in 2020
- Fire suppression back flow in 2020
- Drinking fountain fixture upgrades in 2021

EDUCATIONAL SUITABILITY

- Gray has only one small gymnasium.
- Administrative offices are undersized; the principal does not have a dedicated office.
- The administrative offices do not have sight lines to the main entry creating supervision and access control challenges.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Addition of accessible and age-appropriate play equipment.
- Add flexible furnishings to support student collaboration.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms and locker rooms (once finalized).
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory motor room.

Moderate Priority

- As a multi-level building without an elevator, Gray has been identified as a candidate for modernization under a future bond. Extensive accessibility upgrades to the building and site are needed.
- Re-purpose an existing space into a wellness room.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Allocate an area for a Reconnection Services office.
- Renovate main entry to align with district's updated Ed Specs. This may require renovating the main office to improve visual and/or physical connection to the main entry.
- Re-purpose space to provide a dedicated security office.
- Re-purpose space for a 2nd visual arts classroom, providing separate teaching stations for 2D and 3D visual arts instruction.
- Add or re-purpose space for a 2nd music room with shared ensemble/practice rooms, music office, and music library.
- Create a flexible performance area by upgrading existing stage and/or repurposing space.
- Add a makerspace to support STEAM activities in alignment with CTE pathways at the high school level.

Lower Priority

- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

HARRIET TUBMAN MIDDLE SCHOOL

ADDRESS
2231 N FLINT AVE

CONSTRUCTION DATE
1952 (PRIMARY)

LEVELS
2

BLDG AREA
87,610 SF

SITE AREA
132,858 SF
3.05 ACRES

CLASSROOM COUNT
33

FUNCTIONAL CAPACITY
732 STUDENTS

CLUSTER
GRANT

MODULAR CLASSROOMS
0

ZONING
CM3 COMMERCIAL MIXED USE 3

HISTORICAL SUMMARY

The Harriet Tubman (originally Eliot Elementary School) is a two story brick veneer building designed in the International style. The campus consists of the original L-shaped building built in 1952 and 1983 ribbed concrete additions that are located along the east (front) and west (rear) elevations of the building. The Brutalist styled addition is connected to the original building creating a modified rectangular plan. A rectangular concrete building is located to the north of the primary facility, and the two facilities are connected via a covered breezeway.

Harriet Tubman school is situated in the Eliot neighborhood of East Portland. The neighborhood consists of a mix of commercial, industrial, and single and multi family residences. The campus occupies an irregular shaped parcel that is bound on the north by Lillis Albina Park, on the east by N. Flint Avenue, on the south by commercial buildings, and on the west by Interstate 5. The school is located on the south end of the campus and an industrial arts building is located to the north. Parking is provided along the south, west, and north sides of the building and play areas are provided in Lillis Albina Park to the north.

While Tubman is a notable historic building, it does not retain a level of historical integrity commensurate with other Portland schools constructed during the same period and is therefore not eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

As of this writing, Harriet Tubman Middle School is under consideration for relocation. Student population data is presented below.

» For the 2021-22 school year, 62% of Tubman's students are historically underserved; this is significantly higher than the middle school mean (37%).
» For the 2021-22 school year, 35% of Tubman students qualified for free or reduced lunch; this is above the middle school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Tubman is forecast at 60% utilization. Over the next several years, enrollment is projected to decline slightly to 57% by the 2030-31 school year, Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

FACILITY CONDITION SUMMARY

Harriet Tubman Middle School is 69 years old, but in good condition as with a facility condition index (FCI) score of 0.05. The district invested significant funds to renovate Tubman in 2018, addressing facilities deficiencies as well as abatement of hazardous substances. As the average FCI score for non-modernized middle schools in PPS is 0.12; Tubman's FCI score indicates that its building is in better condition than all other non-modernized middle schools.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The building had several plumbing fixtures that appeared to date from original construction, but the majority of plumbing fixtures appeared to have been replaced at the time of the South Addition project in 1986. The plumbing system was observed to be in good condition with no major deficiencies.
» A majority of the HVAC system was upgraded in 2018 and is in excellent condition. Existing HVAC equipment serving the South Addition had not been replaced as part of the upgrade but appeared to be in good working condition.

Fire Protection

» The building was observed to have a wet-pipe sprinkler system. The piping and sprinkler heads were estimated to have been installed as part of the South Addition and renovation project in 1986 and were observed to be in average condition with no major deficiencies.
» An addressable fire alarm system headend (Silent Knight 5820XL) and associated detection and signal devices were installed in 2014.

Electrical

» As part of the upgrade of the overall HVAC system in 2018, a 480Y/277V electrical service was added to the building. This new service is in excellent condition and is dedicated to the new HVAC systems. However, the majority of the building is served by a 208Y/120V service that was installed with the South Addition and renovation project in 1986. The main 208Y/120V electrical switchboard and its associated panel boards had exceeded their typical design lives. The original 208Y/120V switchboard had been backfed from the main switchboard and was still in use, serving panels also dating back to original construction. These had all exceeded their typical design lives and should be replaced. A new sub-distribution board and associated panel board had been added in 1996 as part of a telecommunications upgrade.

Arch/Struct/Site

» The lockers in the locker rooms had exceeded typical design life and had excessive wear and denting throughout.
» The aluminum south facing exterior windows of the Industrial Arts building had deteriorated frames and sealant. (The building function is now a dance room.)
» The exterior architectural components are planned for future assessment.

RECENT CAPITAL EXPENDITURES

» Significant building system upgrades were completed in 2018 including a new mechanical system
» Drinking fountain fixture replacements in 2021

EDUCATIONAL SUITABILITY

» Some classrooms lack windows.
» The school's SPED classroom is undersized.
» The cafeauditorum shares walls with classrooms, causing noise transference between spaces.
» The health room lacks space for a cot.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Addition of accessible and age-appropriate play equipment and a covered play structure.
- Add flexible furnishings to support student collaboration.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms and locker rooms (once finalized).
- Re-purpose space to create an art exhibition area.
- Complete 2020 bond-funded security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory room.
- Conduct inventory and assessment of SPED classrooms and support spaces to determine alignment with SPED programmatic goals.

Moderate Priority

- Re-purpose an existing space into a wellness room.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Allocate an area for a Reconnection Services office.
- Re-purpose space for a 2nd visual arts classroom, providing separate teaching stations for 2D and 3D visual arts instruction.
- Add or re-purpose space for a 2nd music room with shared ensemble/practice rooms, music office, and music library.
- Upgrades to existing stage / auditorium (as needed) to support performing arts instruction.
- Add a makerspace to support STEAM activities in alignment with CTE pathways at the high school level.

Lower Priority

- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

HARRISON PARK MIDDLE SCHOOL (ANTICIPATED)

ADDRESS
2225 SE 87TH AVE

CONSTRUCTION DATE
1949 (PRIMARY)

LEVELS
2

BLDG AREA
110,775 SF

SITE AREA
235,224 SF
5.4 ACRES

CLASSROOMS COUNT
39

FUNCTIONAL CAPACITY
890 STUDENTS

CLUSTER
MCDANIEL

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

The Harrison Park School (originally Binnsmead Elementary) is situated in the Montavilla neighborhood of East Portland. The School is a single-story building with variegated brick veneer exhibiting limited elements of the International style.

Construction began on the campus in 1949, and today includes the main building, several additions made in 1975, and another addition built in 1987. The building features a linear composition and asymmetrical plan. These International style elements, in addition to bands of aluminum windows, flat roofs, overhangs, and lack of ornamentation, serve to reinforce the ideals of functionalism and minimalism.

The Montavilla neighborhood consists of single family homes and industrial and commercial buildings. The Harrison Park campus occupies a long rectangular shaped parcel that is bound on the north by Harrison Park, on the east by SE 87th Avenue, on the south by industrial buildings, and on the west by SE 85th Avenue. The school is located in the middle of the campus with parking provided to the east and south of the building, a playground to the west, and play fields to the north.

While Harrison Park School is a notable historic building, it does not retain a level of historical integrity commensurate with other Portland schools constructed during the same period and is therefore not eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

At the time of this report, PPS is in the process of transitioning Harrison Park to a middle school configuration and changing the school's attendance boundaries. As such, future RESJ indicators are to be determined at this school.

ENROLLMENT & UTILIZATION

Due to Harrison Park's impending transition to a middle school with resultant school boundary changes, enrollment projections for this school are not indicative of future numbers. The school's transition to a middle school will also impact its functional capacity and utilization numbers. As such, this section should be updated following Phase II of the Enrollment and Program Balancing process in spring 2022.

FACILITY CONDITION SUMMARY

Harrison Park is 72 old and in critical condition with a facility condition index (FCI) score of 0.35. As the average FCI score for non-modernized middle schools in PPS is 0.12, Harrison Park's building is in much worse condition than most middle schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The pumps on the condensate recovery system were observed to be corroded and reportedly have functionality issues.
- Most of the domestic water equipment had been replaced in the past seven years and was observed to be in good condition.
- The roof drains were missing covers and were blocked by debris build-up.
- The boilers were original to the facility but had been retrofitted with gas burners.

Fire Protection

- The building did not have a fire suppression system.

Electrical

- The site's service entrance equipment and a portion of the electrical system's interior distribution was replaced in 2003. However, a portion of the system including distribution panels, the automatic transfer switch, and the lighting throughout the facility had exceeded their typical design lives.

Arch/Struct/Site

- There was a significant amount of standing water beneath the insulated roof panels, with some panels having been torn up and not replaced. Vegetation was growing throughout the inverted panel roof. There was evidence of roof leaks on the interior of the building.
- Multiple exterior windows were observed to be cracked or broken from vandalism.
- The exterior brick walls were weathered with minor to moderate cracking observed.
- The majority of the interior finishes were observed to be aged beyond their design lives, with patched VCT flooring and worn carpet throughout. The wall tiles in the corridors were cracked in many areas.
- Most of the wood interior doors had exceeded their typical design life.
- The wood cabinets and casework in the classrooms had excessive surface wear, typical in most classrooms.

RECENT CAPITAL EXPENDITURES

- Fire alarm upgrades in 2020
- Drinking fountain fixture replacements in 2020
- Partial roof replacement in 2021

EDUCATIONAL SUITABILITY

- General classrooms are undersized (72% of size standard on average).
- The school has a few purposely designed areas to accommodate flexible instruction.
- The school has two (2) science labs, a purposely designed music room, and an art room. A kiln is also present.
- The school has two (2) gyms and a dance room.
- The school has a small auditorium.
- The cafeteria is undersized for the current student enrollment.

EDUCATIONAL PROGRAM FORECAST

- Harrison Park's educational program forecast is dependent upon the results of Phase II of the PPS Enrollment and Program Balancing initiative that was in process at the time of this document.

HOSFORD MIDDLE SCHOOL

ADDRESS
2303 SE 28TH PL

CONSTRUCTION DATE
1925 (PRIMARY)

LEVELS
3

BLDG AREA
88,532 SF

SITE AREA
293,159 SF
6.73 ACRES

CLASSROOM COUNT
32

FUNCTIONAL CAPACITY
696 STUDENTS

CLUSTER
CLEVELAND

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU
R2.5 RESIDENTIAL 2,500 CU

HISTORICAL SUMMARY

The Hosford Middle School is located on a campus that consists of a multi-story school building and north wing additions. Situated in the primarily single family residential neighborhood of Southeast Portland, the school was built in 1925 in the Classical Revival style.

The building is a reinforced concrete structure with brick veneer cladding. The elevations feature cast stone and terra cottage ornamentation. The irregular shaped plan includes classrooms, an auditorium, a gymnasium, a cafeteria, and an administrative office. The building, which faces SE 28th Place, is situated on a grass-covered and asphalt campus with play fields west of the school. There are asphalt-covered playgrounds located to the west and south of the school. Two rectangular wings are connected to the north and northwest sides of the main building.

Due to the loss of integrity, Hosford School is not eligible under NRHP Criteria A, B, or C.

RESJ CONSIDERATIONS

Facility improvements to Hosford would be less impactful to underserved communities.

- For the 2021-22 school year, approximately 20% of Hosford's students are historically underserved, less than the middle school mean (37%).
- For the 2021-22 school year, 20% of Hosford's students qualified for free or reduced lunch; this is less than the middle school mean (26%).
- Hosford would benefit from an additional elevator; the existing elevator does not serve all program areas.

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Hosford is forecast at 98% utilization. Over the next several years, enrollment is projected to decline, reaching 80% by the 2030-31 school year.

FACILITY CONDITION SUMMARY

Hosford is 96 old and in fair condition with a facility condition index (FCI) score of 0.08. As the average FCI score for non-modernized middle schools in PPS is 0.12, Hosford's building is in better condition than most middle schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the plumbing fixtures had exceeded their design lives. The domestic water distribution equipment was nearing the end of its typical design life.
- The vast majority of the steam heating equipment, exhaust fans, air handling units, fan coil units, controls and associated equipment had exceeded their design lives.

Fire Protection

- The building was not observed to be sprinklered.
- An addressable fire alarm system headend (Potter PFC-6800) and associated detection and signal devices had been installed within the last year.

Electrical

- The site's main distribution switchboard was replaced in 1998 and was observed to be in good condition. The majority of the school's panel boards, however, were original to the building and had exceeded their design lives. Another group had been added during the mechanical systems upgrade in the basement in 1985, and while these two had exceeded their design lives, they were observed to have been well maintained. Two panel boards had been installed in 1997 as part of the technology upgrade.

Arch/Struct/Site

- Consider structural assessment based on signs of potential structural movement and water infiltration at the north end of the building. Grading and drainage repairs had been made to remedy water intrusion but there was damage to concrete walls and stairs.
- The wood framed windows were beyond typical design life. The frames had significant degradation on the interior and exterior. Staff commented that the window frames had lead paint. Previous repairs included adding exterior metal flashing on top of the wood frames with the most damage.
- The majority of interior architectural components had exceeded design life.

RECENT CAPITAL EXPENDITURES

- Asbestos mitigation (wood shop flooring) in 2018
- Playground equipment upgrades in 2018
- Repaving of walkway in 2019
- Asbestos abatement in 2020
- Drinking fountain fixture replacements in 2021

EDUCATIONAL SUITABILITY

- General classrooms are greatly undersized (58% of size standard on average).
- The school lacks designated music rooms; the auditorium is used for this purpose.
- Art classes are held in the basement in an area not designed for this purpose.
- Only one small gym is present.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Addition of accessible and age-appropriate play equipment and a covered play structure.
- Add flexible furnishings to support student collaboration.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms and locker rooms (once finalized).
- Re-purpose space to create an art exhibition area.
- Complete 2020 bond-funded security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory room.
- Conduct inventory and assessment of SPED classrooms and support spaces to determine alignment with SPED programmatic goals.

Moderate Priority

- Re-purpose an existing space into a wellness room.

- » Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- » Allocate an area for a Reconnection Services office.
- » Renovate main entry to align with district's updated Ed Specs. This may require renovating the main office to improve visual and/or physical connection to the main entry.
- » Re-purpose space to provide a dedicated security office.
- » Re-purpose space for a 2nd visual arts classroom, providing separate teaching stations for 2D and 3D visual arts instruction.
- » Add or re-purpose space for separate band and choir rooms with shared ensemble/practice rooms, music office, and music library. (Note: music is currently taught in the auditorium)
- » Upgrades to existing stage / auditorium (as needed) to support performing arts instruction.
- » Add a makerspace to support STEAM activities in alignment with CTE pathways at the high school level.

Lower Priority

- » Expand P.E. storage by repurposing space and/or adding casework.
- » Allocate instructional, office, and meeting space for Virtual Scholars.
- » Athletic upgrades including construction of an auxiliary gym and the addition of new turf field with a track. The aux gym should be constructed to a seismic performance level of immediate occupancy, serving as a potential community shelter in the event of a natural disaster.

JACKSON MIDDLE SCHOOL

ADDRESS
10625 SW 35TH AVE

CONSTRUCTION DATE
1966 (PRIMARY)

LEVELS
3

BLDG AREA
219,281 SF

SITE AREA
1,586,891 SF
36.43 ACRES

CLASSROOM COUNT
40

FUNCTIONAL CAPACITY
908 STUDENTS

CLUSTER
WELLS-BARNETT

MODULAR CLASSROOMS
0

ZONING
OS OPEN SPACE CU

HISTORICAL SUMMARY

Jackson Middle School is located in the West Portland Park neighborhood of Southwest Portland. The sprawling, interconnected campus encompasses the main school building, which consists of an office, auditorium wing, cafeteria, gymnasium, library, two "resource centers" (classrooms that encircle an open middle space), and a detached 1970 autoshop. Originally constructed as a high school, this "unit" plan school is indicative of trends in modernist architectural movements of the mid-1960s.

Constructed of precast concrete slabs with polished gravel exterior surfaces, the building's various functions are communicated by the different heights, massing, and fenestration patterns for each section of the building. The building also reflects the influences of the more suburban context as it is situated off the main road, approached via a U-shaped drive, and set within an expansive property.

The campus occupies a roughly square shaped parcel that is bounded to the north by SW Alfred St., to the east by SW 35th Ave., to the west by SW 40th Ave. and to the south by residential development. The school building is approached via a U-shaped driveway that extends west of 35th Ave. to allow for easy drop off to a concrete column lined shelter on the front (east) side of the school. Development in the surrounding area consists primarily of single family residences built between 1930 and 2000.

The Jackson School retains its integrity with its floor plan, and many of the exterior and interior finishes remain intact. Therefore it is recommended as eligible for the NRHP. The school, as PPS's only example of a unit plan design, is further eligible for the NRHP under Criterion C.

RESJ CONSIDERATIONS

Facility improvements to Jackson would be less impactful to underserved communities.

- For the 2021-22 school year, 24% of Jackson's students are historically underserved, below the middle school mean (37%).
- For the 2020-21 school year, 15% of Jackson students qualified for free or reduced lunch, well below the middle school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Jackson is forecast at 91% utilization. Over the next several years, enrollment is projected to decline, reaching 80% by the 2030-31 school year.

FACILITY CONDITION SUMMARY

Jackson Middle School is 55 years old and in fair condition with a facility condition index (FCI) score of 0.09. As the average FCI score for non-modernized middle schools is 0.12, Jackson's building is in better condition than most middle schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the plumbing fixtures had exceeded their design lives. The domestic water distribution equipment was nearing the end of its typical design life.
- The vast majority of the steam heating equipment, exhaust fans, air handling units, fan coil units, controls and associated equipment had exceeded their design lives.

Fire Protection

- The building was not observed to be sprinklered.
- An addressable fire alarm system headend (Potter PFC-6800) and associated detection and signal devices had been installed within the last year.

Electrical

- The site's main distribution switchboard was replaced in 1998 and was observed to be in good condition. The majority of the school's panel boards, however, were original to the building and had exceeded their design lives. Another group had been added during the mechanical systems upgrade in the basement in 1985, and while these two had exceeded their design lives, they were observed to have been well maintained. Two panel boards had been installed in 1997 as part of the technology upgrade.

Arch/Struct/Site

- Consider structural assessment based on signs of potential structural movement and water infiltration at the north end of the building. Grading and drainage repairs had been made to remedy water intrusion but there was damage to concrete walls and stairs.
- The wood framed windows were beyond typical design life. The frames had significant degradation on the interior and exterior. Staff commented that the window frames had lead paint. Previous repairs included adding exterior metal flashing on top of the wood frames with the most damage.
- The majority of interior architectural components had exceeded design life.

RECENT CAPITAL EXPENDITURES

- Roof replacement and seismic upgrades in 2021.
- Drinking fountain fixture upgrades in 2021.

EDUCATIONAL SUITABILITY

- The SPED classrooms do not have a dedicated, adjacent accessible restroom. Four (4) of the school's science labs lack sinks.
- Although there is an auditorium present, it is in poor condition with missing and damaged seats.
- The fixed bleachers in the gymnasium are in disrepair and unusable.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Develop the Jackson campus as a regional athletics hub serving the district. At minimum, provide double-wide football/soccer fields (side-by-side) with artificial turf and field lighting. May also include additional interior and exterior athletic upgrades.
- Addition of accessible and age-appropriate play equipment and a covered play structure.
- Add flexible furnishings to

support student collaboration.
» Incorporate recommendations of All Gender Task Force, including restrooms and locker rooms (once finalized).
» Re-purpose space to create an art exhibition area.
» Complete 2020 bond-funded security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory room.
» Conduct inventory and assessment of SPED classrooms and support spaces to determine alignment with SPED programmatic goals.

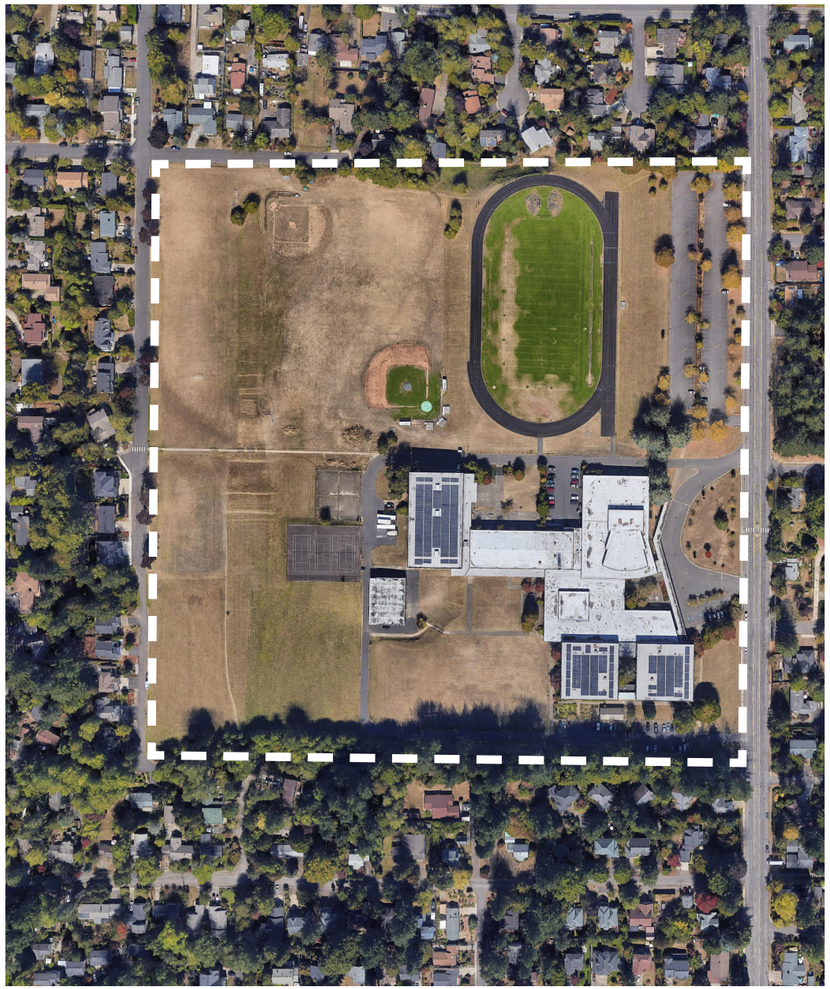
Moderate Priority

» Re-purpose an existing space into a wellness room.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Allocate an area for a Reconnection Services office.
» Re-purpose space for a 2nd visual arts classroom, providing separate teaching stations for 2D and 3D visual arts instruction.
» Add or re-purpose space for a 2nd music room with shared ensemble/practice rooms, music office, and music library.
» Upgrades to existing stage / auditorium (as needed) to support performing arts instruction.
» Add a makerspace to support STEAM activities in alignment with CTE pathways at the high school level.

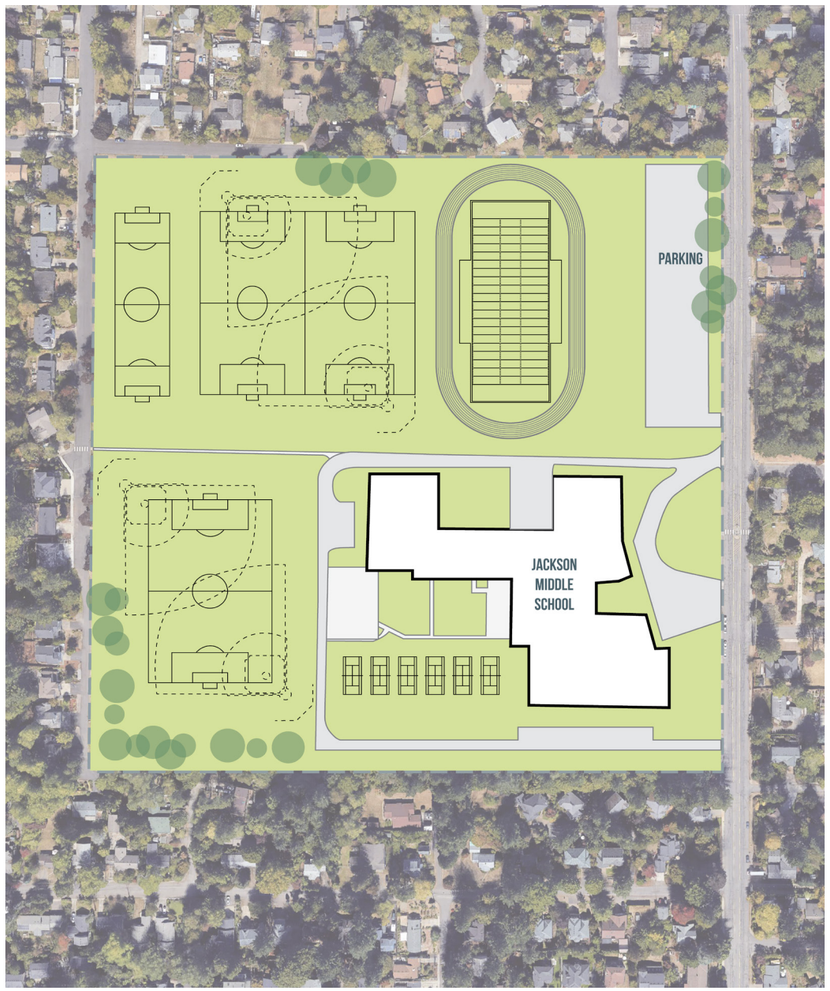
Lower Priority

» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

JACKSON MS SITE STUDY



Existing Site



Proposed Athletics Programming

KELLOGG MIDDLE SCHOOL

ADDRESS
3300 SE 69TH AVE

CONSTRUCTION DATE
2021

LEVELS
3

BLDG AREA
108,110 SF

SITE AREA
252,648 SF
5.8 ACRES

CLASSROOMS COUNT
33

FUNCTIONAL CAPACITY
803 STUDENTS

CLUSTER
FRANKLIN

MODULAR CLASSROOMS
0

ZONING
R5 - RESIDENTIAL 5,000
RM1 - RESIDENTIAL MULTI-DWELLING 1
RM2 - RESIDENTIAL MULTI-DWELLING 2

HISTORICAL SUMMARY

Kellogg Middle School was rebuilt in 2021.

LANE MIDDLE SCHOOL

ADDRESS
7200 SE 60TH AVE

CONSTRUCTION DATE
1927 (PRIMARY)

LEVELS
2

BLDG AREA
94,753 SF

SITE AREA
395,960 SF
9.09 ACRES

CLASSROOM COUNT
39

FUNCTIONAL CAPACITY
770 STUDENTS

CLUSTER
FRANKLIN

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Lane Middle School is situated in the Brentwood Darlington neighborhood of southeast Portland. The two-story building rests on a poured concrete foundation. Constructed from reinforced concrete with a cladding of variegated light red brick, the Classical Revival style building features cast stone cartouches, arched window and door openings, and coping at the parapet. Later additions to the school are also clad in variegated brick but with minimal architectural ornamentation. Development in the neighborhood consists of primarily single family residences constructed between 1925 and 1950. The school campus retains a pastoral quality due to its location immediately to the south of Brentwood Park. Tennis courts, ball fields, and playgrounds occupy the east side of campus. The primary entrance to the campus is from 60th Avenue. Secondary entrances are located adjacent to the asphalt covered parking areas that occupy the north and south ends of the building.

Lane does not retain a level of historical integrity commensurate with other Portland Middle Schools constructed of similar styles during the same period and is therefore not eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Lane Middle School has multiple attributes that place it in a high priority category for facility improvements to advance the district's racial equity and social justice (RESJ) goals.

» For the 2021-22 school year, 43% of Lane's students are historically underserved; above the middle school mean (37%).
» For the 2021-22 school year, 44% of Lane students qualified for free or reduced lunch; above the middle school mean (26%).
» Lane Middle School is a two-story building without an elevator preventing students with mobility challenges or physical disabilities from accessing spaces on the 2nd level.

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Lane is forecast at 53% utilization. Over the next several years, enrollment is projected to decline, reaching 41% by the 2030-31 school year. Given this anticipated enrollment pattern, the district should plan for program consolidation or co-location with other programs.

It is important to note that PPS is currently considering enrollment and program redistribution scenarios between Lane and Harrison Park as part of the conversion of Harrison Park into a middle school. As such, Lane's enrollment will likely differ significantly from the current forecast.

FACILITY CONDITION SUMMARY

Lane is nearly a century old and in poor condition with a facility condition index (FCI) score of 0.13. As the average FCI score for non-modernized middle schools in PPS is 0.12, Lane's building is in slightly worse condition than most middle schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The majority of the plumbing fixtures had exceeded their design lives.
» The domestic water distribution equipment was recently replaced and was in good condition.
» The vast majority of the heating and cooling equipment, exhaust fans, and associated equipment had exceeded their design lives.

Fire Protection

» The building contained a partial fire sprinkler system. The related piping was estimated to be original to the building and had exceeded its intended useful design life.
» An addressable fire alarm system headend (Potter PFC-6800) and associated detection and signal devices were installed in 2018. Some horn notification devices appeared to have been installed prior to this and were reused.

Electrical

» The majority of the site's electrical distribution system had exceeded its intended design life.
» The main distribution switchboard was installed in 1987 (as were most of the building's panel boards); however, the original switchboard (installed in 1960) was still in service and had been back-fed from the new service.

Arch/Struct/Site

» The large roof hatch had weak springs and broken latch hardware. The small roof hatch had missing hardware.
» The cabinets and countertops were observed with excessive wear.
» There were damaged, cracked, and missing vinyl composition tile flooring throughout.
» The carpeting in high traffic areas was observed with excessive wear.
» There were missing glue-on acoustic ceiling tiles.
» The windows, doors, and lockers were nearing the end of typical design life.

RECENT CAPITAL EXPENDITURES

» Asbestos abatement (boiler) in 2017.
» Reader board repair in 2018.
» Flooring replacement / asbestos abatement in one room in 2019.
» Radon mitigation in 2019.
» Kiln replacement in 2019.
» Drinking fountain fixture replacements in 2021.
» Hazardous substances mitigation (asbestos and lead painting) in 2021.

EDUCATIONAL SUITABILITY

» Interiors are dated in appearance.
» Science labs are undersized and lack appropriate equipment.
» Only one music room is present.
» The school lacks an auxiliary gym.
» The SPED classroom is undersized and lacks a dedicated, adjacent accessible restroom.

EDUCATIONAL PROGRAM FORECAST

High Priority

» As a multi-level building without an elevator, Lane is a strong candidate for modernization under a future bond. Extensive accessibility upgrades to the building and site are needed.

- Addition of accessible and age-appropriate play equipment and a covered play structure.
- Flexible furnishings to support student collaboration.
- Incorporate recommendations of PPS' All Gender Task Force (once finalized).
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.
- Add a sensory room.

Moderate Priority

- Lane is among several middle schools identified for athletic upgrades. This would include construction of an auxiliary gym and the addition.
- Re-purpose an existing space into a wellness room.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Allocate an area for a Reconnection Services office.
- Re-purpose space to provide a dedicated security office.
- Re-purpose space for a 2nd visual arts classroom, providing separate teaching stations for 2D and 3D visual arts instruction.
- Add or re-purpose space for a 2nd music room with shared ensemble/practice rooms, music office, and music library.
- Create a flexible performance area by upgrading existing stage and/or repurposing space.
- Upgrades existing stage / drama area (as needed) to support performing arts instruction.
- Add a makerspace to support STEAM activities in alignment with CTE pathways at the high school level.

Lower Priority

- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

MT. TABOR MIDDLE SCHOOL

ADDRESS
5800 SE ASH ST

CONSTRUCTION DATE
1952 (PRIMARY)

LEVELS
1

BLDG AREA
79,477 SF

SITE AREA
323,215 SF
7.42 ACRES

CLASSROOMS COUNT
31

FUNCTIONAL CAPACITY
682 STUDENTS

CLUSTER
FRANKLIN

MODULAR CLASSROOMS
0

ZONING
R2.5 RESIDENTIAL 2,500 CU

HISTORICAL SUMMARY

The Mount Tabor Middle School (originally Mount Tabor School) is a one story brick veneer building designed in the International style. The campus consists of the 1952 Mount Tabor Middle School, which features a modified L-shaped plan, and a series of additions have been added to the south elevation of the building. These additions have enclosed the original L-shaped plan and formed a central courtyard. The building features a linear composition and asymmetrical plan. These International style elements, in addition to bands of aluminum windows, low sloped roofs, overhangs, and lack of ornamentation serve to reinforce the ideals of functionalism and minimalism. Mount Tabor Middle School has been extensively modified over time to meet the evolving needs of the Portland Public Schools.

The building has been expanded five times since its original construction. Additions (1958, 1968, 1976, 1987, and 1991) were constructed along the south and east elevations of the main facility.

The neighborhood consists of a mix of commercial and single and multi family residences built primarily between 1920 and 1950. The Mount Tabor campus occupies a rectangular shaped parcel that is bound on the north by SE Ash, on the east by SE 60th Avenue, on the south by residential buildings, and on the east by SE 57th Avenue. The school is located on the west end of the campus and play fields are located on the east side of the campus. Parking is provided to the south and playgrounds are to the southeast of the facility.

Mount Tabor Middle School does not retain a level of historical integrity and is therefore not eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Improvements to Mt. Tabor Middle School would moderately advance the district's racial equity and social justice (RESJ) goals.

» For the 2021-22 school year, 18% of Mt. Tabor's students are historically underserved; this is below the middle school mean (37%).
» For the 2020-21 school year, 9% of Mt Tabor students qualified for free or reduced lunch, significantly below the middle school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Mt. Tabor is forecast at 101% utilization. Over the next several years, enrollment is projected to decline, reaching 90% by the 2030-31 school year.

FACILITY CONDITION SUMMARY

Mt. Tabor Middle School is 69 years old and in poor condition with a facility condition index (FCI) score of 0.15. As the average FCI score for non-modernized middle schools in PPS is 0.12, Mt. Tabor building is in worse condition than most middle schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The majority of the plumbing fixtures had exceeded their design lives. The domestic water distribution equipment was nearing the end of its typical design life.
» The vast majority of the steam heating equipment, exhaust fans, air handling units, fan coil units, controls and associated equipment had exceeded their design lives.

Fire Protection

» The building was not observed to be sprinklered.
» An addressable fire alarm system headend (Potter PFC-6800) and associated detection and signal devices had been installed within the last year.

Electrical

» The site's main distribution switchboard was replaced in 1998 and was observed to be in good condition. The majority of the school's panel boards, however, were original to the building and had exceeded their design lives. Another group had been added during the mechanical systems upgrade in the basement in 1985, and while these two had exceeded their design lives, they were observed to have been well maintained. Two panel boards had been installed in 1997 as part of the technology upgrade.

Arch/Struct/Site

» Consider structural assessment based on signs of potential structural movement and water infiltration at the north end of the building. Grading and drainage repairs had been made to remedy water intrusion but there was damage to concrete walls and stairs.
» The wood framed windows were beyond typical design life. The frames had significant degradation on the interior and exterior. Staff commented that the window frames had lead paint. Previous repairs included adding exterior metal flashing on top of the wood frames with the most damage.
» The majority of interior architectural components had exceeded design life.

RECENT CAPITAL EXPENDITURES

» Drinking fountain fixture upgrades in 2021.
» Partial roof replacement in 2021.

EDUCATIONAL SUITABILITY

» Three (3) of the school's science labs are converted general classrooms; all are undersized with inadequate sinks and electrical outlets.
» The SPED classroom is undersized and lacks an a dedicated, adjacent ADA restroom.
» Although both a main and aux gym are present, they are both undersized.
» Administrative offices are not adjacent to the main entry creating supervision and access control challenges.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Addition of accessible and age-appropriate play equipment and a covered play structure.
» Add flexible furnishings to support student collaboration.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms and locker rooms (once finalized).
» Re-purpose space to create an art exhibition area.
» Security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.

Moderate Priority

» Re-purpose an existing space into a wellness room.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Allocate an area for a Reconnection Services office.
» Re-purpose space for a 2nd visual arts classroom, providing separate teaching stations for 2D and 3D visual arts instruction.
» Add or re-purpose space for a 2nd music room with shared ensemble/practice rooms, music office, and music library.
» Create a flexible performance area by upgrading existing stage and/or repurposing space.
» Add a makerspace to support STEAM activities in alignment with CTE pathways at the high school level.

Lower Priority

» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

OCKLEY GREEN MIDDLE SCHOOL

ADDRESS
6031 N MONTANA AVE

CONSTRUCTION DATE
1925 (PRIMARY)

LEVELS
2

BLDG AREA
74,018 SF

SITE AREA
226,512 SF
5.2 ACRES

CLASSROOM COUNT
31

FUNCTIONAL CAPACITY
689 STUDENTS

CLUSTER
JEFFERSON

MODULAR CLASSROOMS
3

ZONING
OS OPEN SPACE CU

HISTORICAL SUMMARY

Ockley Green Middle School is situated in the Arbor Lodge neighborhood of north Portland. Aligned on a north south axis, the two story school building is situated at the east side of the campus. In addition to the main school building, the campus has two portables located at its northwest corner and an attached gymnasium annex at the northeast corner of the campus. The reinforced concrete structure, faced with a variegated brick, rests on a poured concrete foundation. A flat roof with a parapet covers the rectangular building. Designed in the Collegiate Gothic style, cast stone architectural details highlight the windows doors and other significant elements of the exterior elevations. Variations in the brickwork below the parapet provide additional visual relief in the long elevations.

Development in the surrounding neighborhood consists primarily of single family residences built primarily between 1925-1950. Play fields are located at the west side of the campus.

Due to the loss of integrity, Ockley Green Elementary School is not eligible under either NRHP Criteria A, B, or C.

RESJ CONSIDERATIONS

Ockley Green Middle School has multiple attributes that place it in a high priority category for facility improvements to advance the district's racial equity and social justice (RESJ) goals.

- For the 2019-20 school year, 56% of Ockley Green's students are historically underserved, above the middle school mean (37%).
- For the 2020-21 school year, 30% of Ockley Green students qualified for free or reduced lunch, exceeding the middle school mean (26%).
- Ockley Green Middle School is a two-story building without an elevator, restricting students with mobility challenges or physical disabilities from accessing any spaces on the 2nd level.

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Ockley Green is forecast at 72% utilization. Over the several years, enrollment is projected to decline, reaching 66% by the 2030-31 school year.

FACILITY CONDITION SUMMARY

Ockley Green is 96 years old and in poor condition with a facility condition index (FCI) score of 0.15. As the average FCI score for non-modernized middle schools in PPS is 0.12, Ockley Green's building is in worse condition than most middle schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- The majority of the plumbing fixtures had exceeded their design lives. The domestic water distribution equipment was nearing the end of its typical design life.
- The vast majority of the steam heating equipment, exhaust fans, air handling units, fan coil units, controls and associated equipment had exceeded their design lives.

Fire Protection

- The building was not observed to be sprinklered.
- An addressable fire alarm system headend (Potter PFC-6800) and associated detection and signal devices had been installed within the last year.

Electrical

- The site's main distribution switchboard was replaced in 1998 and was observed to be in good condition. The majority of the school's panel boards, however, were original to the building and had exceeded their design lives. Another group had been added during the mechanical systems upgrade in the basement in 1985, and while these two had exceeded their design lives, they were observed to have been well maintained. Two panel boards had been installed in 1997 as part of the technology upgrade.

Arch/Struct/Site

- Consider structural assessment based on signs of potential structural movement and water infiltration at the north end of the building. Grading and drainage repairs had been made to remedy water intrusion but there was damage to concrete walls and stairs.
- The wood framed windows were beyond typical design life. The frames had significant degradation on the interior and exterior. Staff commented that the window frames had lead paint. Previous repairs included adding exterior metal flashing on top of the wood frames with the most damage.
- The majority of interior architectural components had exceeded design life.

RECENT CAPITAL EXPENDITURES

- Exterior masonry repair in 2018.
- Wireless technology upgrades in 2019.
- Drinking fountain fixture replacements in 2020.
- Partial roof replacement in 2021.

EDUCATIONAL SUITABILITY

- General classrooms, science labs, and SPED rooms are undersized.
- One small gym is present.
- A performing arts space is present, but the stage lacks lighting or sound systems.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- As a multi-level building without an elevator, Ockley Green is a strong candidate for modernization under a future bond. Extensive accessibility upgrades to the building and site are needed.
- Addition of accessible and age-appropriate play equipment and a covered play structure.
- Add flexible furnishings to support student collaboration.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms and locker rooms (once finalized).
- Re-purpose space to create an art exhibition area.
- Security projects, including new classroom door locks and improvements to the security / alarm system.

- » Re-purpose an existing space into a sensory motor room.

Moderate Priority

- » Ockley Green is among several middle schools identified for athletic upgrades. This would include construction of an auxiliary gym and the addition of new turf field with a track. The aux gym should be constructed to a seismic performance level of immediate occupancy, serving as a potential community shelter in the event of a natural disaster.
- » Re-purpose an existing space into a wellness room.
- » Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- » Allocate an area for a Reconnection Services office.
- » Renovate main entry to align with district's updated Ed Specs. This may require renovating main office to improve visual and/or physical connection to the main entry.
- » Re-purpose space to provide a dedicated security office.
- » Re-purpose space for a 2nd visual arts classroom, providing separate teaching stations for 2D and 3D visual arts instruction.
- » Add or re-purpose space for a 2nd music room with shared ensemble/practice rooms, music office, and music library.
- » Upgrade existing stage / auditorium (as needed) to support performing arts instruction.
- » Add a makerspace to support STEAM activities in alignment with CTE pathways at the high school level.

Lower Priority

- » Expand P.E. storage by repurposing space and/or adding casework.
- » Allocate instructional, office, and meeting space for Virtual Scholars.

ROSEWAY HEIGHTS MIDDLE SCHOOL

ADDRESS
7334 NE SISKIYOU ST

CONSTRUCTION DATE
1923 (PRIMARY)

LEVELS
2

BLDG AREA
103,610 SF

SITE AREA
371,567 SF
8.53 ACRES

CLASSROOM COUNT
39

FUNCTIONAL CAPACITY
803 STUDENTS

CLUSTER
MCDANIEL

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Roseway Heights Middle School is situated in northeast Portland. The two-story school building rests on a poured concrete foundation. The primary construction system is reinforced concrete. Parapets located on the flat roof mask the skylights and mechanical systems. The school features a variety of architectural styles including Collegiate Gothic embellishments on the central bay of the east elevation, Mediterranean embellishments on the north and south bays of the east elevation, and a contemporary hybrid of the Mediterranean and Modern styles on the west elevations.

The neighborhood consists primarily of single family residence built between 1920 and 1950. Oriented on a east-west axis, the school building is located at the northeast portion of a rectangular parcel. Playgrounds and playfields occupy the south portion of the campus. Asphalt covered parking lots are located on the south and west sides of the campus. The primary entrance to the campus is from the north on Siskiyou Street. The path to the secondary entrance on the west elevation from the parking lot is flanked with columns.

Although designed by a noted Portland architect and associated with several events related to the growth of the Portland school district, Roseway Heights School does not retain a level of historical significance and integrity and is therefore not eligible for the National Register of Historic Places.

RESJ CONSIDERATIONS

Roseway Heights Middle School has multiple attributes that place it in a high priority category for facility improvements to advance the district's racial equity and social justice (RESJ) goals.

- » For the 2021-22 school year, 46% of Roseway Heights students are historically underserved; above the middle school mean (37%).
- » For the 2021-22 school year, 36% of Roseway Heights students

qualified for free or reduced lunch, exceeding the middle school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Roseway Heights is forecast at 78% utilization. Over the next several years, enrollment is projected to decline, reaching 72% by the 2030-31 school year.

FACILITY CONDITION SUMMARY

Roseway Heights is 98 years old and in fair condition with a facility condition index (FCI) score of 0.09. As the average FCI score for non-modernized middle schools in PPS is 0.12, Roseway Heights' building is in slightly better condition than most middle schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- Plumbing fixtures were aged, but operational. The majority of the water closet flush valves had been updated with dual-flush handles.
- Thirteen air handling units were observed inside the facility, as well as two rooftop units. There were also 31 fan coil units located above the ceiling tiles throughout the facility. Many of the fan coil units made excessive noise and all units had exceeded their typical design lives.
- Both of the facility's boilers were replaced in 2002.

Fire Protection

- The fire alarm control panel was installed around 2010 and fire alarm devices had been recently replaced.
- There was a wet pipe sprinkler system observed throughout the basement level. No deficiencies were observed or reported with the system.

Electrical

- Four panels were added in 1996 to support IT equipment, but the remaining electrical distribution equipment was original to building construction in 1989 and had exceeded its typical design life.
- The parking lot lighting was reported have had unidentified issues that require further investigation. These fixtures were also original to the 1989 construction and were in need of replacement.

Arch/Struct/Site

- The exterior wall expansion joints were degraded, and areas of the exterior wall were cracked.
- There were signs of water intrusion and deteriorating walls at the boiler room exterior doors.
- The majority of interior architectural components had exceeded design life.
- The exterior steps around the site were deteriorated.

RECENT CAPITAL EXPENDITURES

- Ceiling piping system improvements in 2018.
- Drinking fountain fixture replacements in 2020.
- Wooden loft removal in 2020.

EDUCATIONAL SUITABILITY

- The school has four (4) undersized science labs.
- Two music rooms are provided with a shared music library and storage rooms.
- The aux gym is significantly undersized (36% of size standard).
- The school has an assortment of performing arts spaces, including an auditorium, drama classrooms, and a dance room.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
- Addition of accessible and age-appropriate play equipment and a covered play structure.
- Add flexible furnishings to support student collaboration.
- Incorporate recommendations of PPS' All Gender Task Force, including restrooms and locker rooms (once finalized).
- Re-purpose space to create an art exhibition area.
- Complete 2020 bond-funded security projects, including new classroom door locks and improvements to the security / alarm system.
- Re-purpose an existing space into a sensory room.
- Conduct inventory and assessment of SPED classrooms and support spaces to determine alignment with SPED programmatic goals.

Moderate Priority

- Re-purpose an existing space into a wellness room.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Allocate an area for a Reconnection Services office.
- Re-purpose space for a 2nd visual arts classroom, providing separate teaching stations for 2D and 3D visual arts instruction.
- Music room upgrades which may include increasing the size of the two (2) existing small music rooms and creation of shared ensemble/practice rooms, music office, and music library.
- Upgrades existing stage / auditorium (as needed) to support performing arts instruction.
- Add a makerspace to support STEAM activities in alignment with CTE pathways at the high school level.

Lower Priority

- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.
- Athletic upgrades including construction of an auxiliary gym and the addition of new turf field with a track. The new aux gym should be constructed to a seismic performance level of immediate occupancy, serving as a potential community shelter in the event of a natural disaster. (Note: existing aux gym is present, but is greatly undersized at only 36% of Ed Spec requirements)

SELLWOOD MIDDLE SCHOOL

ADDRESS
8300 SE 15TH AVE

CONSTRUCTION DATE
1914 (PRIMARY)

LEVELS
3

BLDG AREA
87,364 SF

SITE AREA
206,910 SF
4.75 ACRES

CLASSROOM COUNT
30

FUNCTIONAL CAPACITY
683 STUDENTS

CLUSTER
CLEVELAND

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Sellwood Middle School is located in the Sellwood neighborhood of southeast Portland. The campus includes a primary building and a connected annex surrounded by asphalt covered parking and play areas. The reinforced concrete structure, covered in white stucco, rests on a poured concrete foundation. A flat roof covers the irregular shaped mass of the building. The fenestration consists of a mixture of original multi-light wood frame and grouped metal frame windows.

Designed in the Art Deco style, the poured concrete is molded to create a water table, belt course, and parapet cap. The concrete also forms the pilasters, capped by gilded figures of eagles, which flank the entries to the building. Below the belt courses, bands of floral inscribed squares outlined in projecting concrete ribbons provide additional horizontal divisions to the multi-story structure. The single story gymnasium annex to the east was constructed in 1987.

Development in the surrounding area consists primarily of single family residences built between 1900 and 1950. The school building is situated at the north portion of a rectangular parcel. An asphalt covered parking area is located at the southwest side of the campus. Recreational facilities consist of two grass covered playfields on the southeast side of the parcel.

Sellwood School does not retain a level of historical integrity commensurate with other Portland schools constructed of similar styles during the same period, and is therefore not eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Sellwood's student body is less diverse than other district middle schools and has one of the lowest counts for students who qualify for free and reduced lunch.

» For the 2021-22 school year, 14% of Sellwood students are historically underserved, significantly below the middle school mean (37%).
» For the 2021-22 school year, 9% of Sellwood students qualified for free or reduced lunch, significantly below the middle school mean (26%).
» Sellwood Middle School is a two-story building without an elevator preventing students with mobility challenges or physical disabilities from accessing spaces on the 2nd level.

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Sellwood is forecast at 83% utilization. Over the next several years, enrollment is projected to decline, reaching 72% by the 2030-31 school year.

FACILITY CONDITION SUMMARY

Sellwood is 107 years old and in poor condition with a facility condition index (FCI) score of 0.17. As the average FCI score for non-modernized middle schools in PPS is 0.12, Sellwood's building is in worse condition than most middle schools in the district.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The majority of the plumbing fixtures had exceeded their design lives. The domestic water distribution equipment was nearing the end of its typical design life.
» The vast majority of the steam heating equipment, exhaust fans, air handling units, fan coil units, controls and associated equipment had exceeded their design lives.

Fire Protection

» The building was not observed to be sprinklered.

Electrical

» The site's main distribution switchboard was replaced in 1998 and was observed to be in good condition. The majority of the school's panel boards, however, were original to the building and had exceeded their design lives. Another group had been added during the mechanical systems upgrade in the basement in 1985, and while these two had exceeded their design lives, they were observed to have been well maintained. Two panel boards had been installed in 1997 as part of the technology upgrade.

Arch/Struct/Site

» The wood framed windows were beyond typical design life. The frames had significant degradation on the interior and exterior. Staff commented that the window frames had lead paint. Previous repairs included adding exterior metal flashing on top of the wood frames with the most damage.
» The majority of interior architectural components had exceeded design life.

RECENT CAPITAL EXPENDITURES

» Parking lot improvements in 2018 (signs and re-striping).
» Drinking fountain fixture replacements in 2021.

EDUCATIONAL SUITABILITY

» The school's aux gym is being used as an extension of the cafeteria and is not available for P.E. activities.
» The school lacks purposely-designed music rooms; music is taught in a former shop area in the basement.
» The administrative offices do not have direct visual access to the main entry creating supervision and access control challenges.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
» As a multi-level building without an elevator, Sellwood is a strong candidate for modernization under a future bond. Extensive accessibility upgrades to the building and site are needed.
» Addition of accessible and age-appropriate play equipment and a covered play structure.
» Add flexible furnishings to support student collaboration.
» Incorporate recommendations of All Gender Task Force, including restrooms and locker rooms (once finalized).

- » Re-purpose space to create an art exhibition area.
- » Security projects, including new classroom door locks and improvements to the security / alarm system.
- » Re-purpose an existing space into a sensory motor room.

Moderate Priority

- » Re-purpose an existing space into a wellness room.
- » Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- » Allocate an area for a Reconnection Services office.
- » Renovate main entry to align with district's updated Ed Specs. This may require renovating main office to improve visual and/or physical connection to the main entry.
- » Re-purpose space to provide a dedicated security office.
- » Re-purpose space for a 2nd visual arts classroom, providing separate teaching stations for 2D and 3D visual arts instruction.
- » Add or re-purpose space for separate band and choir rooms with shared ensemble/practice rooms, music office, and music library. (Note: music is currently taught in a former shop area in the basement)
- » Create a flexible performance area by upgrading existing stage and/or repurposing space.
- » Add a makerspace to support STEAM activities in alignment with CTE pathways at the high school level.

Lower Priority

- » Expand P.E. storage by repurposing space and/or adding casework.
- » Allocate instructional, office, and meeting space for Virtual Scholars.

WEST SYLVAN MIDDLE SCHOOL

ADDRESS
8111 SW WEST SLOPE DR

CONSTRUCTION DATE
1954 (PRIMARY)

LEVELS
2

BLDG AREA
108,187 SF

SITE AREA
593,287 SF
13.62 ACRES

CLASSROOM COUNT
40

FUNCTIONAL CAPACITY
987 STUDENTS

CLUSTER
LINCOLN

MODULAR CLASSROOMS
0

ZONING
R7 CITY OF BEAVERTON

HISTORICAL SUMMARY

The West Sylvan Middle School is situated near the residential neighborhood of West Slope in East Beaverton. Built in 1954, the school building is situated on a mostly grass-covered campus. The modern period building exhibits some characteristics of the Northwest Regional style. A flat roof covers the irregularly shaped building. The modified finger plan building is a single story and rests on a poured concrete foundation. A two-story attached wing is located to the west of the main building. Cladding for the wood framing building consists of a mixture of brick veneer, concrete, and corrugated metal siding. The school facilities include classrooms, two gymnasiums (including an auditorium and cafeteria), media center/library, industrial shop, home economics, choir and band rooms, two courtyards, and an administrative office.

The West Sylvan School is situated on a suburban-style campus typical of post-World War II schools. Grass covered playfields are located to the south and west of the school. An asphalt-covered driveway lies adjacent to the southeast of the school building and several parking areas are located to the southeast and east. A courtyard, with mixed deciduous growth, serves as the primary organizing element for the building. A smaller courtyard is located between the west wing and the main section of the school. West Sylvan School does not retain a level of historical integrity commensurate with other Middle Schools constructed of similar styles during the same period and is therefore not eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Facility improvements to West Sylvan would be less meaningful to the district's racial equity and social justice goals than improvements at other middle schools.

- » For the 2021-22 school year, 16% of West Sylvan students are historically underserved, below

the middle school mean (37%).
» For the 2021-22 school year, 7% of West Sylvan students qualified for free or reduced lunch, significantly below the middle school mean (26%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, West Sylvan is forecast at 83% utilization. Over the next 15 years, enrollment is projected to decline, reaching 73% by the 2030-31 school year.

FACILITY CONDITION SUMMARY

West Sylvan is 67 years old and in poor condition with a facility condition index (FCI) score of .14. As the average FCI score for non-modernized middle schools in PPS is 0.12, West Sylvan's building is in somewhat worse condition than most middle schools in the district.

Facility condition assessments conducted in 2018 -19 revealed the following deficiencies:

Mechanical & Plumbing

» The majority of the plumbing fixtures had exceeded their design lives. The domestic water distribution equipment was nearing the end of its typical design life.
» The vast majority of the steam heating equipment, exhaust fans, air handling units, controls and associated equipment had exceeded their design lives.

Fire Protection

» The building was sprinklered throughout. The system is estimated to be in good working condition.
» An addressable fire alarm system headend (Silent Knight 5820XL) and associated detection and signal devices were installed (estimated) in 2014. Legacy smoke detection devices, however, were observed in the east addition and had not yet been upgraded.

Electrical

» There were two 208Y/120V services at the school – one 1200A main distribution board was installed adjacent to the kitchen in 1988, and one 600A main distribution board was installed as part of the West Addition in 1990. The majority of panel boards in the facility had exceeded or were approaching the end of their design life, but had been well maintained. Those original to the main building were most in need of replacement, those installed with the west and north additions in 1985 and 1990, respectively, were a lower priority. Several panels installed with the technology upgrade in 1997 were newer. A generator had been installed as part of the west addition and had exceeded its design life.

Arch/Struct/Site

» Consider emergency egress options for classrooms surrounding the interior courtyard areas. Staff reported that the windows which open to the interior courtyards are difficult to operate. Emergency plan includes opening windows, exiting to the courtyard and then entering the school through windows on the other side of the courtyard.
» The roof covering was observed with widespread areas of alligator cracking, soft spots, ponding, debris buildup and organic growth. There was evidence of leaks on the interior and staff reported leaks.
» The windows were beyond typical design life and the frames had areas of damage.
» The majority of interior architectural components had exceeded design life.
» The asphalt had large areas of alligator cracking.

RECENT CAPITAL EXPENDITURES

» Athletic field improvements in 2018.
» Drainage improvements in 2018.
» Water line repair in 2019.
» Drinking fountain fixture replacements in 2021.

EDUCATIONAL SUITABILITY

» West Sylvan is one of few middle schools in the district that has separate, purposely-designed band and choir rooms.
» The cafeteria and kitchen are both undersized.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Accessibility upgrades to allow all students to enter the building via the main entry and navigate all essential programming within the building.
» Addition of accessible and age-appropriate play equipment and a covered play structure.
» Add flexible furnishings to support student collaboration.
» Incorporate recommendations of PPS' All Gender Task Force, including restrooms and locker rooms (once finalized).
» Re-purpose space to create an art exhibition area.
» Complete 2020 bond-funded security projects, including new classroom door locks and improvements to the security / alarm system.
» Re-purpose an existing space into a sensory motor room.

Moderate Priority

» West Sylvan is among several middle schools identified for athletic upgrades. This would include the addition of new turf field with a track. (Note: an aux gym is present)
» Re-purpose an existing space into a wellness room.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Allocate an area for a Reconnection Services office.
» Renovate the main entry to align with district's updated Ed Specs. This may require renovating main office to improve visual and/or physical connection to the main entry.
» Re-purpose space to provide a dedicated security office.
» Re-purpose space for a 2nd visual arts classroom, providing separate teaching stations for 2D and 3D visual arts instruction.
» Provide shared practice / ensemble rooms for existing band and choir rooms.
» Create a flexible performance area by upgrading existing stage and/or repurposing space.
» Add a makerspace to support STEAM activities in alignment with CTE pathways at the high school level.

Lower Priority

» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

HIGH SCHOOLS

BENSON HIGH SCHOOL

ADDRESS
546 NE 12TH AVE

CONSTRUCTION DATE
2024 (PRIMARY)

LEVELS
2

BLDG AREA
371,189 SF

SITE AREA
378,972 SF
8.7 ACRES

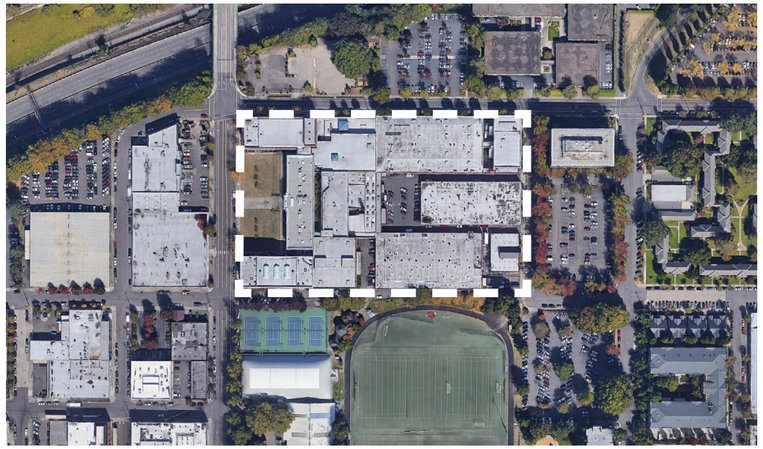
CLASSROOMS COUNT
86

FUNCTIONAL CAPACITY
2,203

CLUSTER
CLEVELAND

MODULAR CLASSROOMS
0

ZONING
EX - CENTRAL EMPLOYMENT



HISTORICAL SUMMARY

As of the writing Benson High School is being modernized

CLEVELAND HIGH SCHOOL

ADDRESS
3400 SE 26TH AVE

CONSTRUCTION DATE
1929 (PRIMARY)

LEVELS
3

BLDG AREA
256,984 SF

SITE AREA
493,535 SF
11.33 ACRES

CLASSROOMS COUNT
75

FUNCTIONAL CAPACITY
1,859 STUDENTS

CLUSTER
CLEVELAND

MODULAR CLASSROOMS
2

ZONING
R2.5 RESIDENTIAL 2,500 CU

HISTORIC SUMMARY

Cleveland High School consists of two separate properties. The main school campus is located in the Hosford-Abernethy neighborhood, while the Cleveland Field is located at 3100 SE Powell Blvd in the Richmond neighborhood in southeast Portland. Designed in the Classical Revival style, the three story main school building exhibits an extensive use of terra cotta panels to emphasize the main entrance, ancillary entrances, windows, corners, cornice, and parapet. The interior of the original building features a square corridor plan with several additions situated to the east. These additions include a gymnasium, shop wing, classroom addition, as well as a detached portable. The Cleveland Field property lies to the east of the main school property and features a restrooms building as well as grandstands, a track, and an athletic field.

Development in the surrounding area consists of commercial as well as single and multi-family residential built between 1890 and 1950. Much of the commercial development is centered on Powell Blvd. that borders both properties to the south.

With all of the additions placed on the east side of the school and in spite of the replacement of its original windows, Grover Cleveland High School remains eligible for the National Register of Historic Places (NRHP) as it retains much of its historical integrity.

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Cleveland serves a less diverse student population with relatively low poverty levels compared to the district average.

» For the 2021-22 school year, 17% of students are historically underserved, well below the high school mean (37%).
» For the 2021-22 school year, 20% of students qualified for free or reduced lunch, less than the high school mean (20%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Cleveland High School is forecast at 86% utilization. By the 2030-31 school year, utilization is projected to decrease to 80%.

FACILITY CONDITION SUMMARY

Cleveland High School is 92 years old, and in poor condition with a facility condition index (FCI) score of 0.29. The average FCI score for non-modernized high schools in PPS is 0.24.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» Main: steam boilers have considerable remaining useful life due to upgrades/repairs.
» Piping and ducting (general): aged beyond useful design life.
» Gym Addition: majority of water coolers not functional.
» Plumbing fixtures: aged beyond useful design life and becoming erratic.

Fire Protection

» Main: coverage in corridors, entry/exit doors into classrooms.
» Gymnasium: coverage in weight room/mat room.
» East and South Additions: coverage in corridors and classrooms.

Electrical

» Electrical distribution: significant portion is aged despite upgrades in 1997.
» Electrical capacity of the building is a concern in general.
» Security/alarm system: generally insufficient coverage.
» Exterior lighting: generally insufficient coverage (security concerns).

Arch/Struct/Site

» Interior finishes: all are aged beyond design life and deteriorated.
» Auditorium: cracking in plaster wall finish/wall near balcony.
» Parking areas: resurface and fill cracks.
» Landscaping: clean up and thin out at all elevations.
» ADA: handrails not compliant, door hardware not consistent.
» Stadium: metal seating and stairs at the stadium is aged and deteriorated.

RECENT CAPITAL EXPENDITURES

» Football Field Turf Replacement in 2017
» Select Flooring Replacements in 2018
» ADA Improvements in 2018-19
» Dust Collection System Replacement in 2019
» Drinking Fountain Fixture Replacements in 2021
» Planning and Design for Future Modernization in 2021

EDUCATIONAL SUITABILITY

» While the age of the facility limits the availability of modern learning style spaces, the numerous wings and additions have provided a degree of flexibility.
» General classrooms range in size from approximately 575 to over 1,000 square feet. On average classrooms meet approximately 70% of the size standard.
» The special education space meets less than 50% of the size standard.
» A number of the science classrooms have outdated physical environments that lack the necessary spatial components to allow for small group interaction.
» Separate band and choir rooms are provided.
» 3D and 2D art rooms are somewhat small (approximately 80% of size standard).
» CTE spaces are dated and undersized.
» While adequate gym space is provided the wrestling room and P.E. support areas are undersized.
» The auditorium is sufficiently sized, but the stage is small per the district's space standards.
» The kitchen is not utilized; equipment is not functional.
» The campus lacks fencing. The building has numerous entrances that are difficult to monitor.

EDUCATIONAL PROGRAM FORECAST

The district has started the process to fully modernize Cleveland High School. Planning and design work to modernize Cleveland High School is funded through the 2020 Bond. Construction costs are expected to be financed by future bonds.

FRANKLIN HIGH SCHOOL

ADDRESS
5405 SE WOODWARD ST

CONSTRUCTION DATE
2017 (PRIMARY)

LEVELS
3

BLDG AREA
296,719 SF

SITE AREA
797,148 SF
18.3 ACRES

CLASSROOMS COUNT
74

FUNCTIONAL CAPACITY
1,744 STUDENTS

CLUSTER
FRANKLIN

MODULAR CLASSROOMS
0

ZONING
IR INSTITUTIONAL RESIDENTIAL LCU

HISTORICAL SUMMARY

Franklin High School is located in the South Tabor neighborhood of Southeast Portland. The large campus includes the original Colonial Revival style central building integrated into an entirely modernized building in 2017. Modernization includes a fully modernized gymnasium to east and a modernized stadium and athletic field.

The campus occupies an expansive rectangular shaped parcel that is positioned between SE Woodward St. to the south and Division St. to the north. Development in the surrounding area consists primarily of single family residences built between 1900-1950. Some multi-family housing and institutional buildings are situated in close proximity to the school, but they are not predominant. The property also includes expansive playing fields that include a football field and baseball field. Just to the east of the school are playing fields and tennis courts that are part of Clinton Park and Atkinson School. They are situated to the northeast of the high school property. The grounds immediately in front (north) of the school are divided into two equal quadrants, while the rear (south) area features an oval shaped road and paths that lead to the rear entrance.

RESJ CONSIDERATIONS

Franklin's student population is largely reflective of district-wide averages for high schools:

» For the 2021-22 school year, 31% of students are historically underserved, near the high school mean (37%).
» For the 2020-21 school year, 22% of students qualified for free or reduced lunch, slightly above the high school mean (20%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Franklin High School is forecast at 118% utilization. By the 2030-31 school year, utilization is projected to decrease to 110%.

FACILITY CONDITION SUMMARY

Franklin High School is four years old, and in good condition as with a facility condition index (FCI) score of 0.0.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The HVAC equipment, water distribution equipment, and plumbing fixtures had all been replaced during a 2017 renovation and were observed to be in good condition with no major deficiencies.

Fire Protection

» The fire protection equipment and fire alarm devices were all replaced during a 2017 renovation and was observed to be in good condition with no major deficiencies

Electrical

» The majority of the electrical distribution equipment and lighting was fully renovated in 2017, however, the natural gas generator and corresponding transfer switch in the second-floor boiler room had exceeded their design lives.

Arch/Struct/Site

» The interior walls throughout the library (SS-117) and other areas of the east wing were observed to be degraded from moisture and water infiltration.
» The concrete floor was observed to be cracked throughout the café (SS-104).
» The roof wall covering was observed to be loose/detached at the roof mechanical area of the auditorium wing.

RECENT CAPITAL EXPENDITURES

» Sidewalk/Curb Replacement in 2018
» Assorted Repairs Following Modernization in 2019
» Security Upgrades in 2020

EDUCATIONAL SUITABILITY

» There are two rooms for students supported through special education. The rooms are located near their bus loading area, but isolated from other instructional areas in the lower level and in a separate wing.
» Science classrooms range from 78% to 89% of the size standard.
» The metal shop and the robotics space have issues with adequate and appropriate electrical service.
» There is no security vestibule present. The main office does not have remote control of the main entry doors. The campus layout makes supervision challenging. .

EDUCATIONAL PROGRAM FORECAST

High Priority

» Incorporate recommendations of PPS' All Gender Task Force, including restrooms and locker rooms (once finalized).
» Re-purpose space to create an art exhibition area.
» Re-purpose an existing space into a sensory motor room.
» Evaluate whether SPED focus classroom renovations are needed to support an inclusive instructional model and align with the updated district Educational Specifications.
» Expand dedicated space(s) for community programs.
» Re-purpose existing space(s) to provide dedicated supports for social emotional health (e.g. calming room).

Moderate Priority

» Re-purpose an existing space into a wellness room.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Allocate an area for a Reconnection Services office.
» Add/re-purpose a smaller dedicated activity space for Adapted P.E.

Lower Priority

» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

GRANT HIGH SCHOOL

ADDRESS
2245 NE 36TH AVE

CONSTRUCTION DATE
2019 (PRIMARY)

LEVELS
3

BLDG AREA
303,271 SF

SITE AREA
444,312 SF
10.2 ACRES

CLASSROOMS COUNT
74

FUNCTIONAL CAPACITY
1,686 STUDENTS

CLUSTER
GRANT

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Grant High School is located in the Grant Park neighborhood of Northeast Portland. The ten acre campus includes an extensive collection of educational buildings constructed between 1923 and 1970 including the main original building. The majority of the school, including gymnasium, was rebuilt in 2019. Set within a flat, pastoral setting of trees and parkland, the front exterior of the building constructed in the 1920s at Grant High School. This portion exhibits a variety of character defining features including a bilaterally symmetrical U-shaped plan, a bold portico supported by fluted Ionic columns with a broad terra cotta frieze, ancillary entries with terra cotta Ionic columns or pilasters and classical entablatures, a concrete watertable, terra cotta stringcourse, terra cotta cornice and coping.

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Grant serves a less diverse student population with relatively low poverty levels compared to the district average.

» For the 2021-22 school year, 19% of students are historically underserved, well below the high school mean (37%).
» For the 2020-21 school year, 11% of students qualified for free or reduced lunch, significantly less than the high school mean (20%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Grant High School is forecast at 122% utilization. By the 2030-31 school year, utilization is projected to decrease to 111%.

FACILITY CONDITION SUMMARY

Grant High School is two years old, and in good condition with a facility condition index (FCI) score of 0.0.

RECENT CAPITAL EXPENDITURES

» Full Modernization in 2019
» Gym Lighting Improvements in 2020
» Grant Bowl Improvements in 2021

EDUCATIONAL SUITABILITY

» Educational suitability data was not available. Facility was constructed in 2019. The design aligned with the district's Educational Specifications.

EDUCATIONAL PROGRAM FORECAST

High Priority

» Incorporate recommendations of PPS' All Gender Task Force, including restrooms and locker rooms (once finalized).
» Re-purpose space to create an art exhibition area.
» Re-purpose an existing space into a sensory motor room.
» Evaluate whether SPED focus classroom renovations are needed to support an inclusive instructional model and align with the updated district Educational Specifications.
» Expand dedicated space(s) for community programs.
» Re-purpose existing space(s) to provide dedicated supports for social emotional health (e.g., calming room).

Moderate Priority

» Re-purpose an existing space into a wellness room.
» Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
» Allocate an area for a Reconnection Services office.
» Add/re-purpose a smaller dedicated activity space for Adapted P.E.

Lower Priority

» Expand P.E. storage by repurposing space and/or adding casework.
» Allocate instructional, office, and meeting space for Virtual Scholars.

JEFFERSON HIGH SCHOOL

ADDRESS
5210 N KERBY AVE

CONSTRUCTION DATE
1909 (PRIMARY)

LEVELS
4

BLDG AREA
318,790 SF

SITE AREA
610,711 SF
14.02 ACRES

CLASSROOMS COUNT
74

FUNCTIONAL CAPACITY
1,817 STUDENTS

CLUSTER
JEFFERSON

MODULAR CLASSROOMS
0

ZONING
IR INSTITUTIONAL RESIDENTIAL LCU

HISTORICAL SUMMARY

Jefferson High School is located in the Humboldt neighborhood of North Portland. The campus includes the original 1909 school building (with several subsequent additions), an auto shop, and a gymnasium. The high school building currently exhibits limited evidence of its former architectural style that once revealed the tensions between the Arts and Crafts and Classical Revival Movements. Several subsequent additions and exterior alterations, however, have diminished the building's architectural integrity.

The campus stretches from north to south between N. Kirby Ave. and N. Commercial Ave. and bisected by N. Alberta Ave. Development in the surrounding area consists primarily of single family residences built between 1890 and 1950 along N. Killingsworth Ave., which forms the northern boundary of the property, as well as mixed commercial and residential uses. The Jefferson High School campus consists of the original main building, gymnasium addition, auditorium addition, girl's gymnasium, free-standing gymnasium, and an auto shop. Most of the buildings are clustered in the center of the property with a football field located to the north and a baseball field situated to the south.

Jefferson High School does not retain sufficient architectural integrity to be eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Jefferson High School has multiple attributes that place it in a high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals.

» For the 2021-22 school year, 67% of students are historically underserved, significantly greater than the high school mean (48%).
» For the 2021-22 school year, 35% of students qualified for free or reduced lunch, exceeding the high school mean (20%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Jefferson High School is forecast at 34% utilization. By the 2030-31 school year, utilization is projected to increase slightly to 35%.

FACILITY CONDITION SUMMARY

Jefferson High School is 112 years old, and in poor condition with a facility condition index (FCI) score of 0.21. The average FCI score for non-modernized high schools in PPS is 0.24.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The hydraulic elevator Is nearing the end of its design life.
» The majority of the plumbing fixtures and domestic water distribution equipment had exceeded their design lives.
» The vast majority of the heating hot water equipment, exhaust fans, air handling units, fan coil units, and associated equipment had exceeded their design lives.

Fire Protection

» The fire riser, fire backflow preventer, and sprinkler system in the auditorium as well as the fire riser in the Boy's Gym had exceeded their design lives.

Electrical

» The majority of the site's electrical distribution system had exceeded its intended design life. In addition, there was a Federal Pacific panel in Room TV03 which poses a safety concern. Federal pacific panels contain breakers that may fail to trip resulting in overheating and potential fires.

Arch/Struct/Site

» The roof coverings, roof hatches, and skylights throughout all buildings were observed to be aged, cracked and dried, and had loose flashing at parapets. The roof hatches were difficult to operate and dangerous due to counterweights placed on the exterior.
» The exterior metal fire escape structures (all locations) were observed to be extremely corroded, degraded and aged.
» The exterior windows (TV Wing, Auditorium, Boys Gym) were observed to be aged, had broken glazing panes, degraded.
» The interior finishes (TV Wing) were all were observed to be predominantly aged and degraded.
» The wood gymnasium flooring (Boy's Gym) was observed to have some cracks and previous repairs; it may need replacement in the near future.
» The stadium concrete structure was observed to be crumbling in various areas and the press box was observed to be degraded (all interior/exterior systems).

RECENT CAPITAL EXPENDITURES

» Boiler Repairs in 2017
» Security Upgrades in 2017
» Radon Mitigation in 2018
» Fire Sprinkler Upgrades in 2019
» Mold and Asbestos Abatement in 2020
» Drinking Fountain Fixture Replacements in 2020
» Pre-Bond Planning for Modernization

EDUCATIONAL SUITABILITY

» There are very few spaces that support multiple teaching and learning styles.
» Most classrooms are appropriately sized with some falling below the district's size standard.
» The school lacks purposely designed special education spaces.
» Finishes are worn and dated.
» The science rooms range from 58% to 78% of the room size standard. There are insufficient outlets to meet educational needs. The labs lack emergency showers.
» Only one music room is present (band).
» The art rooms range from 70% to 75% of the size standard.
» The school's only career program is television/video production. Those spaces are inviting and stimulating. There are three unused CTE spaces that used to house wood and metals shops in the main building and an auto shop in an annex building. Those spaces now are used for storage or for the wrestling program.
» The gym is 80% of the size standard. There is not enough seating for the entire student body.
» A large theater is present, but the stage is undersized. The

school does not have a black box theater or drama classroom. A couple dance rooms with sprung floors are present.
» The library media center is greatly undersized (51% of size standard) and uninviting with little natural light.
» The cafeteria has large columns that limit flexible seating options.
» This school has no locked doors, no security vestibule, no buzzer entry system, and is open on all sides to student traffic. The main office does not have visual supervision of any doors.

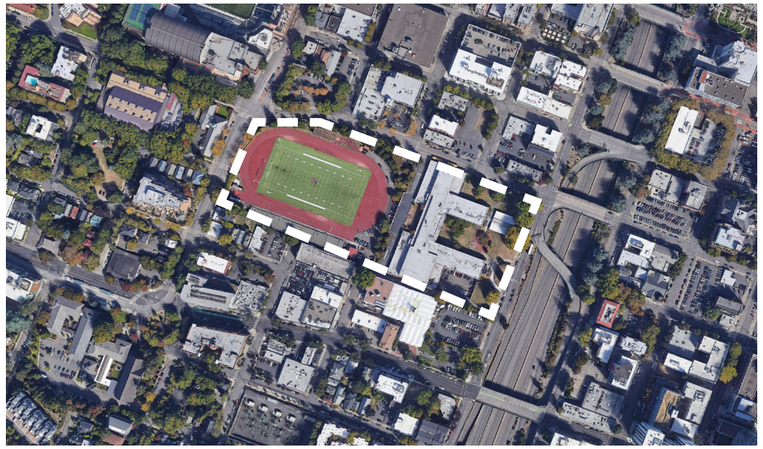
EDUCATIONAL PROGRAM FORECAST

High Priority

Planning will commence in 2022 for the complete modernization of this facility. Construction will be complete in March 2027. The school will be designed per the district's Educational Specifications.

In the interim, provide CTE upgrades to increase the usability of career technical spaces until the facility can be fully modernized.

LINCOLN HIGH SCHOOL



ADDRESS
1600 SW SALMON ST

CONSTRUCTION DATE
2022 (PRIMARY)

LEVELS
6

BLDG AREA
292,000 SF

SITE AREA
477,418 SF
11.0 ACRES

CLASSROOMS COUNT
76

FUNCTIONAL CAPACITY
1,867

CLUSTER
LINCOLN

MODULAR CLASSROOMS
0

ZONING
CX - CENTRAL COMMERCIAL

HISTORICAL SUMMARY

» As of this writing, Lincoln High School is being rebuilt.

MCDANIEL HIGH SCHOOL

ADDRESS
2735 NE 82ND AVE

CONSTRUCTION DATE
2021 (PRIMARY)

LEVELS
4

BLDG AREA
273,646 SF

SITE AREA
1,053,281 SF
24.18 ACRES

CLASSROOMS COUNT
77

FUNCTIONAL CAPACITY
1,739 STUDENTS

CLUSTER
MCDANIEL

MODULAR CLASSROOMS
0

ZONING
IR INSTITUTIONAL RESIDENTIAL LCU

HISTORICAL SUMMARY

» McDaniel High School was modernized and reopened in fall 2021

ROOSEVELT HIGH SCHOOL

ADDRESS
6941 N CENTRAL ST

CONSTRUCTION DATE
2017 (PRIMARY)

LEVELS
4

BLDG AREA
NO DATA

SITE AREA
744,876 SF
17.1 ACRES

CLASSROOMS COUNT
61

FUNCTIONAL CAPACITY
1,320 STUDENTS

CLUSTER
ROOSEVELT

MODULAR CLASSROOMS
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Roosevelt High School is located in the St. Johns neighborhood of North Portland. The campus retained the face of the original school building (1921) which has gone through a modernization in 2017. The main building was designed in the Colonial Revival style and the front facade has been preserved.

The campus occupies a 17 acre, roughly square parcel bounded by N. Smith St. to the north, N. Ida St. to the east, N. Burr St. to the west, and Central Ave. to the south. The school occupies the southeast quadrant of the property with playing fields to the west, track and football field to the northwest, and tennis courts to the north.

Development in the surrounding area consists primarily of single family residences built between 1920 and 1950.

RESJ CONSIDERATIONS

Roosevelt High School has multiple attributes that place it in a high priority category for facility improvements that would advance the district's racial equity and social justice (RESJ) goals.

- For the 2021-22 school year, 63% of students are historically underserved, significantly greater than the high school mean (37%).
- For the 2020-21 school year, 35% of students qualified for free or reduced lunch, exceeding the high school mean (20%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Roosevelt High School is forecast at 103% utilization. Utilization is expected to remain steady over the next decade; after a period of increase over the next 6-7 years, enrollment will then enter a period of decline, settling back at 103% enrollment by 2030-31.

FACILITY CONDITION SUMMARY

Roosevelt High School is four years old, and in good condition with a facility condition index (FCI) score of 0.0.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

- Most of the roof drains were observed to be blocked by debris build-up and as a result, several areas of ponding water were observed on the roof.
- All mechanical and plumbing equipment was replaced during the 2017 renovation and was observed to be in good condition with no major deficiencies noted.

Fire Protection

- All fire protection equipment and fire alarm devices were replaced during the 2017 renovation and were observed to be in good condition with no major deficiencies noted.

Electrical

- The electrical distribution equipment and lighting was fully renovated in 2017 and had no major deficiencies observed.

Arch/Struct/Site

- The wood soffit and areas of the exterior historic architectural features were observed to be deteriorated.
- Broken windows (2) across from the baseball field were observed.
- Previous repairs to the exterior brick wall at the roof elevation of the library were observed to be cracked.

RECENT CAPITAL EXPENDITURES

- Initiated Phase IV and V Modernization Scoping in 2019 (ongoing)
- Dust Collector Replacement in 2019
- Historic Window Restorations in 2020

EDUCATIONAL SUITABILITY

- Roosevelt is a recently modernized school, designed to align with the district's Educational Specifications. As such, the school received a high educational suitability rating.
- The CTE spaces meet an average of 75% of the size standard guidelines.

EDUCATIONAL PROGRAM FORECAST

High Priority

- Incorporate recommendations of PPS' All Gender Task Force, including restrooms and locker rooms (once finalized).
- Re-purpose space to create an art exhibition area.
- Re-purpose an existing space into a sensory motor room.
- Evaluate whether SPED focus classroom renovations are needed to support an inclusive instructional model and align with the updated district Educational Specifications.
- Expand dedicated space(s) for community programs.
- Re-purpose existing space(s) to provide dedicated supports for social emotional health (e.g. calming room).

Moderate Priority

- Re-purpose an existing space into a wellness room.
- Re-purpose existing space to provide a Family Resource Center with kitchen equipment.
- Allocate an area for a Reconnection Services office.
- Add/re-purpose a smaller dedicated activity space for Adapted P.E.

Lower Priority

- Expand P.E. storage by repurposing space and/or adding casework.
- Allocate instructional, office, and meeting space for Virtual Scholars.

IDA B WELLS-BARNETT HIGH SCHOOL

ADDRESS
1151 SW VERMONT ST

CONSTRUCTION DATE
1954 (PRIMARY)

LEVELS
4

BLDG AREA
290,246 SF

SITE AREA
990,990 SF
22.75 ACRES

CLASSROOMS COUNT
76

FUNCTIONAL CAPACITY
1,872 STUDENTS

CLUSTER
WELLS-BARNETT

MODULAR CLASSROOMS
0

ZONING
IR INSTITUTIONAL RESIDENTIAL
LCU MIT PLAN

HISTORICAL SUMMARY

Ida B Wells (formerly Woodrow Wilson) High School is located in the Hillsdale Neighborhood of Southwest Portland. The campus includes the original high school building (1953). The multi-story, International Style school building is a U-shaped finger plan with the gymnasium, auditorium, and music wing all differentiated from the main classroom sections of the school by different massing, building materials, heights, and overall shapes. The classroom sections of the building were constructed of "lifted" concrete slabs and the auditorium, gymnasium, and music wing were constructed using the more conventional tilt slab concrete. Most of the main classrooms lie behind a glazed curtain wall and the second floor library is cantilevered over the first floor.

The campus occupies an expansive rectangular shaped parcel that is positioned between SW Vermont Street to the south, SW Capitol Highway and SW Burlingame Avenue to the north, Mary Rieke School to the west, and a residential development to the east. Development in the surrounding area consists primarily of single family residences built between 1950 and 1990. Playing fields as well as a football field and track are located to the west of the high school. A fence-enclosed outdoor pool is also situated to the west of the gymnasium. The pool is owned by Portland Parks and Recreation.

Given the high level of integrity and the school's unique method of construction, Ida B Wells-Barnett High School is eligible for the National Register of Historic Places (NRHP).

RESJ CONSIDERATIONS

Facility improvements would not be significantly impactful to underserved communities, as Ida B. Wells-Barnett High School serves a less diverse student population with relatively low poverty levels compared to the district average.

» For the 2021-22 school year, 19% of students are historically underserved, below the high school mean (37%).
» For the 2020-21 school year, 10% of students qualified for free or reduced lunch, approximately half of the high school mean (20%).

ENROLLMENT & UTILIZATION

For the 2021-22 school year, Ida B. Wells-Barnett High School is forecast at 88% utilization. By the 2030-31 school year, utilization is projected to increase to 90%.

FACILITY CONDITION SUMMARY

Ida B. Wells High School is 67 years old, and in poor condition with a facility condition index (FCI) score of 0.24. The average FCI score for non-modernized high schools in PPS is 0.24.

Facility condition assessments conducted in 2019-20 revealed the following deficiencies:

Mechanical & Plumbing

» The remaining equipment was original to facility construction.
» The plumbing fixtures had no deficiencies observed. The domestic water piping and sanitary waste piping were not visible for assessment, but had no deficiencies reported..

Fire Protection

» The school had a wet pipe sprinkler system that served the entire building.
» The fire alarm control panel and alarm devices had no deficiencies observed.

Electrical

» The electrical distribution equipment had no deficiencies observed. Distribution branch wiring and grounding systems were not visible for assessment, but had no deficiencies reported.

Arch/Struct/Site

» Moderate cracking was occurring in the south exterior concrete wall.
» One roof hatch was tearing at its hinge. Moderate surface corrosion was present on both roof hatches.
» Multiple concrete exterior stairs had cracks or were crumbling or broken.
» The VCT in the cafeteria was coming loose in spots, with stress cracking in many of the tiles.
» The wood floor was delaminating throughout the cafeteria and gymnasiums.
» There was a major crack in the southwest retaining wall.
» Spaces are not flexible to allow for differentiated instruction.
» The school lacks an auxiliary gym.
» Finishes are worn and dated.
» There is a lack of controlled entrances at this site.

RECENT CAPITAL EXPENDITURES

» Library Media Center Upgrades in 2017
» College Career Center Upgrades in 2017
» Exterior Brick Wall Repairs in 2020
» Drinking Fountain Fixture Repairs in 2021
» Pre-Bond Planning for Modernization

EDUCATIONAL SUITABILITY

EDUCATIONAL PROGRAM FORECAST

High Priority

Planning and design work to modernized Ida B. Wells High School is funded through the 2020 Bond. Construction costs are expected to be financed by future Bonds.

ALTERNATIVE SCHOOLS

GREEN THUMB COMMUNITY TRANSITION PROGRAM

ADDRESS
6801 SE 60TH AVE

CONSTRUCTION DATE
1974 (PRIMARY)

LEVELS
2

BLDG AREA
31,907 SF

SITE AREA
569,633 SF
13.05 ACRES

CLASSROOMS COUNT
6

FUNCTIONAL CAPACITY
130 STUDENTS

CLUSTER
FRANKLIN

MODULAR BLDG
0

ZONING
OS OPEN SPACE CU

HISTORICAL SUMMARY

The Green Thumb Facility is situated in the Brentwood Darlington neighborhood of southeast Portland. The large open campus consists of a residential style office/caretaker building, a classroom building, a rectangular portable, three greenhouses, a rectangular workshop building, a vehicle storage structure, and several small sheds. The collection of buildings is surrounded by large fields, several smaller planting areas, and multiple clusters of trees.

Development in the neighborhood consists of primarily single family residences constructed between 1925 and 1950. The campus retains a pastoral quality due to its location immediately to the west of Lane Middle School and Brentwood Park. Fields, planting areas, and fruit trees occupy the south and north portions of the campus. The primary entrance to the facility is from SE 60th Avenue. The principal structures on the campus are three greenhouses. Although representative of an innovative program designed to assist students in developing job skills, the Green Thumb Facility does not appear to be eligible for the NRHP under Criterion A.

FACILITY CONDITION SUMMARY

Mechanical & Plumbing

- The majority of the plumbing fixtures and domestic water distribution equipment had exceeded typical design life.
- The vast majority of the heating and cooling equipment, exhaust fans, and associated equipment had exceeded typical design life.

Fire Protection

- There was no sprinkler system in any of the buildings at Green Thumb.
- A new addressable fire alarm system headend (Potter PFC-6800) and associated detection and signal devices were installed in 2019.

Electrical

- The panelboards in the house, green house, and utility buildings had exceeded typical design life.

Arch/Struct/Site

- The exterior windows of the house had exceeded typical design life and had broken glazing seals and condensation between their panes.
- The carpet floor finish of the house had exceeded typical design life and had heavy wear and staining throughout.
- The wood siding of the house had exceeded typical design life. The wood siding on the east face of the building had excessive surface weathering and the boards were warped and curled.
- The exterior corrugated fiberglass panel walls of the greenhouse had exceeded typical design life. The exterior surface of the fiberglass panels had heavy UV deterioration with peeling and missing top gelcoat and loose fibers.
- The exterior doors of the greenhouse had exceeded typical design life. The doors had surface damage, were sagging and difficult to open or close, and had aged hardware.
- The interior doors of the greenhouse had exceeded typical design life. The doors had surface damage, were sagging and difficult to open or close, and had aged hardware.
- Several holes were observed in the wood cladding of the north classroom building. The interior acoustical ceiling tile in the classrooms was observed to be stained from water/moisture damage in a few areas.
- The exterior metal doors (personnel doors) of the utility building were observed to be aged and showing signs of corrosion. It appeared that the mechanical parts of the rolling overhead doors has been recently replaced extending the useful life of those doors.
- The interior of the building was largely unfinished with a concrete floor slab throughout and minimal ceiling/wall finishes observed.

MLC
K-12

ADDRESS
2033 NW GLISAN ST

CONSTRUCTION DATE
1914 (PRIMARY)

LEVELS
3

BLDG AREA
70,349 SF

SITE AREA
164,657 SF
3.78 ACRES

CLASSROOMS COUNT
22

FUNCTIONAL CAPACITY
464 STUDENTS

CLUSTER
LINCOLN

MODULAR BLDG
0

ZONING
RH HIGH DENSITY RESIDENTIAL CU

HISTORICAL SUMMARY

The Metropolitan Learning Center is situated in a residential and commercial neighborhood in northwest Portland and was formerly designated the Couch Elementary School. The building faces an asphalt-covered playground, with a city park to the east and a school parking lot to the west. Hoyt and Glisan Streets border the school to the north and south respectively. The three story building is covered by a flat roof. The rectangular mass of the reinforced concrete structure is covered with brick veneer. Built in 1914, the Tudor Revival style building features glazed terra cotta decorative elements. The facilities include classrooms, a gymnasium, an auditorium, and an indoor pool.

The Metropolitan Learning Center/ Couch Elementary School retains its integrity with moderate alterations to its plan and exterior and interior finishes. The 1914 Tudor Revival style school is recommended as eligible for the National Register of Historic Places (NRHP) for its association with progressive era public school construction in Portland (Criterion A).

FACILITY CONDITION SUMMARY

Mechanical & Plumbing

» The majority of the plumbing fixtures and domestic water distribution equipment had exceeded typical design life.
» The vast majority of the steam heating equipment, exhaust fans, air handling units, and associated equipment had exceeded typical design life.
» Fire Protection
» The fire suppression system was observed only in the mechanical/ boiler room.
» An addressable fire alarm system headend (Silent Knight 5820XL) and associated detection and signal devices were installed in 2014.

Electrical

» The majority of the site's electrical distribution system (including the main switchboard and panelboards) had exceeded typical design life. This excludes the UPS and its associated panelboards (i.e. IT1 & IT2) added in the more recent IT upgrade project at the facility. Panelboard 'BP' in the pool area was water damaged and rusting. It was believed that the panelboard was no longer in use.

Arch/Struct/Site

» The built-up roofs with metallic top coating had exceeded typical design life. The roof covering was blistered throughout, and the topcoat had moderate cracking.
» The interior doors had exceeded typical design life. Most of the classroom doors had excessive wear and two wood barn doors in the cafeteria were fixed in the open position due to a steel angle that had been welded to their tracks to keep them permanently open.
» The casework had exceeded typical design life. Approximately 80 percent of the casework appeared to be original and was in poor condition with heavy wear and tear and chipped paint.
» The wall finishes had exceeded typical design life. The glue-on acoustic tiles on the auditorium walls were heavily damaged with gouges throughout and missing and mismatched tiles were observed.
» The carpet had exceeded typical design life.
» The painted and sealed concrete floor finishes had exceeded typical design life. Excessive wear including chips and scratches was observed throughout the facility.
» The ceiling finishes had exceeded typical design life. The gypsum ceiling finish backstage in the auditorium had excessive water damage.
» The original metal frame skylight above the connecting corridor between the main building and the gymnasium had exceeded typical design life and had corroded metal frame components, cracked single pane wired glazing and deteriorated sealant.
» The wood storage cabinets in the corridor between the main building and the gymnasium had had exceeded typical design life. The cabinets had scratched surfaces and damaged and missing hardware.
» The wood gym floor in the gym addition had exceeded typical design life. Facility staff reported that the floor had many dead spots where balls do not bounce well.
» The wood windows of the main building and gym addition were observed to be aged, splintered, and had chipped/cracked painted finish exposing the wood to further deterioration.
» Some of the exterior concrete steps were observed to be in poor condition with cracked treads, nosing and concrete balustrade.
» The playground equipment was determined to be installed/ funded (in the summer of 2019) and maintained by Portland Parks and Recreation.

TERWILLIGER

ADDRESS
6318 SW CORBETT ST

CONSTRUCTION DATE
1916 (PRIMARY)

LEVELS
1

BLDG AREA
26,393 SF

SITE AREA
144,184 SF
3.31 ACRES

CLASSROOMS COUNT
11

FUNCTIONAL CAPACITY
N/A

CLUSTER
WELLS-BARNETT

MODULAR BLDG
2

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORIC SUMMARY

Terwilliger School is a one story brick veneer building designed in the Colonial Revival style. The school is situated in the Lair Hill neighborhood of Southwest Portland. Terwilliger School is a one story brick veneer building designed in the Colonial Revival style.

The campus consists of a U-shaped building and a portable. Constructed in 1916, the school features boxed cornices, brick soldier courses, and eyelid dormer vents along the roofline. Symmetrically arranged aluminum and multi pane casement windows provide the fenestration. The front façade features a central portico with entablature supported by square columns. The cornice of the entablature is ornamented with modillions. Along the roof line is an octagonal cupola with domical roof and weather vane. These Colonial Revival elements, in addition to the building's symmetrical plan and fenestration, serve to reinforce the ideals of order, balance, and formality.

The neighborhood consists of single family residences built primarily between 1920 and 1950. The campus occupies a long, narrow parcel that is located between SW Carolina and SW Dakota.

The school is located roughly in the center of the parcel, with open space located to the west (front) and play areas located to the east (rear) of the building. A linear walkway extends from SW Corbett to the building entrance. A 1948 portable building is located to the northeast of the primary building.

Terwilliger School is recommended as eligible for the National Register of Historic Places (NRHP).

FACILITY CONDITION SUMMARY

Mechanical & Plumbing

» The majority of the mechanical and plumbing system were aged and had exceeded their intended design lives. The boiler's flue and associated piping were corroded and degraded. The backflow preventer had a constant discharge piddling on the floor adjacent to an electrical junction box.

Fire Protection

» The fire alarm control panel and fire alarm devices were all in good condition with no deficiencies observed.
» No fire suppression systems were observed at the site.

Electrical

» The electrical distribution equipment in the main building was approaching the end of design life.

Arch/Struct/Site

» The ACT was water stained in various areas throughout and some ceiling tiles were loose or had fallen off.
» The carpet was heavily worn in corridors.
» The paint on the floor in the mech room was heavily scraped and scuffed.
» Many water stains on interior ceilings and walls indicated roof leaks. The shingled and flat, coated roof coverings were heavily deteriorated.
» The interior wood doors were moderately worn with some chipping paint.
» The engineered wood siding on the exterior had peeling paint and water stains.
» The wood framing on the exterior windows had flaking paint and water damage at exposed wood.
» The concrete foundation wall had minor cracking around the perimeter, with major cracking in the northeast corner.
» The foundation wall of Portable 1 had moderate cracking on the east end.
» There was cracking and flaking engineered wood siding on the east exterior of Portable 1.
» The exterior stairs/stoops of Portable 1 were heavily weathered and cracking.
» The pavement at the north entrance had significant cracking and deterioration.
» The two sets of steps on west side of property did not have handrail, were cracked and beyond their typical design life.
» The sidewalk near the west entrance had major cracking near the storm drain.
» Sections of the perimeter fence was aged and corroded.

PIONEER PROGRAM - HOLLADAY CENTER

ADDRESS
2600 SE 71ST AVE

CONSTRUCTION DATE
1972 (PRIMARY)

LEVELS
1

BLDG AREA
30,568 SF

SITE AREA
409,464 SF
9.4 ACRES

CLASSROOMS COUNT
9

FUNCTIONAL CAPACITY
207 STUDENTS

CLUSTER
FRANKLIN

MODULAR BLDG
0

ZONING
OS OPEN SPACE CU

HISTORICAL SUMMARY

The Youngson-Holladay Campus for special needs children is situated in the South Tabor neighborhood of East Portland. The irregular shaped campus, which consists of three school facilities, is bound on the north by SE Division Street, the east by residences and SE 73rd Avenue, the south by residences, and the west by SE 71st Avenue. In the center of the campus is the 1972 Holladay Center. Each facility features its own parking and driveway.

The Holladay Center and Youngson School are attached via an enclosed walkway. The Holladay Center is a minimalistic square-shaped concrete building that exhibits a hybrid of architectural elements with no consistent style. The building features an open interior plan with classrooms lining the exterior walls. Exterior walls are punctuated by geometric shaped windows. The Holladay Center, known originally as the Holladay Center for the Handicapped, was designed for children with physical disabilities. The minimalistic building reflects some principles of Modern architecture, while the interior spatial composition reflects the educations philosophies of the 1970s. The minimalistic building with its character defining plan and interior details reflects the architectural principles of the later twentieth century and school design for disabled children. The Holladay Center is, therefore, eligible for listing in the NRHP under Criterion A and C.

FACILITY CONDITION SUMMARY

Mechanical & Plumbing

- The majority of the plumbing fixtures and domestic water distribution equipment had exceeded their design life.
- The vast majority of the steam heating equipment, exhaust fans, air handling units, and associated equipment had exceeded typical design life.

Fire Protection

- The building was not sprinklered.
- An addressable fire alarm system headend (Silent Knight 5820XL) and associated detection and signal devices were installed in 2014.

Electrical

- The majority of the site's electrical distribution system (including the main switchboard and panelboards) had exceeded typical design life.

Arch/Struct/Site

- The glazed exterior doors in the connecting enclosed walkway with Youngson Main had exceeded typical design life and had aged and mismatched hardware.
- The roof hatch had exceeded typical design life. The roof hatch had a degraded surface finish, weak springs and damaged and missing hardware.
- The sheet vinyl floor finish had exceeded typical design life and had dents, chips and excessive surface wear throughout.
- The main asphalt surface parking lot at the building was observed to have potholes and crumbling/deteriorating asphalt.
- Several of the concrete sidewalks adjacent to the main parking lot were observed to be cracked with uneven/unlevel surfaces or grass growing in the cracks causing a possible tripping hazard.

PIONEER PROGRAM - YOUNGSON

ADDRESS
2704 SE 71ST AVE

CONSTRUCTION DATE
1955 (PRIMARY)

LEVELS
1

BLDG AREA
31,781 SF

SITE AREA
233,046 SF
5.35 ACRES

CLASSROOMS COUNT
12

FUNCTIONAL CAPACITY
295 STUDENTS

CLUSTER
FRANKLIN

MODULAR BLDG
0

ZONING
OS OPEN SPACE CU

HISTORICAL SUMMARY

The Youngson-Holladay Campus for special needs children is situated in the South Tabor neighborhood of East Portland. The irregular shaped campus, which consists of three school facilities, is bound on the north by SE Division Street, the east by residences and SE 73rd Avenue, the south by residences, and the west by SE 71st Avenue. At the south end of the campus is the 1955 Youngson School. Each facility features its own parking and driveway. For Youngson School parking is provided along the entire west side of the building, which is accessible via a short driveway off SE 71st Avenue. The only play area/ open space is located at the south end of the campus. The design of Youngson School is influenced by the International style. The single story building that comprises the facility features linear wings that form exterior courtyard space. The horizontal massing of the building is emphasized by low sloping gable roofs and, in the case of Youngson School, bands of aluminum hopper windows. Elements such as a linear composition, bands of metal sash windows, low gable roofs, and lack of ornamentation serve to reinforce the ideals of functionalism and minimalism. The Youngson School and Holladay Center are attached via an enclosed walkway.
Due to loss of integrity and the lack of notable post war design principles, the Youngson School is not eligible for listing in the National Register of Historic Places (NRHP).

FACILITY CONDITION SUMMARY

Mechanical & Plumbing

» The majority of the plumbing fixtures and domestic water distribution equipment had exceeded typical design life.
» The vast majority of the heating equipment, air handlers, exhaust fans, and associated equipment had exceeded typical design life.

Fire Protection

» The building was not sprinklered.
» A new addressable fire alarm system headend (Potter PFC-6800) and associated detection and signal devices were installed in 2019.

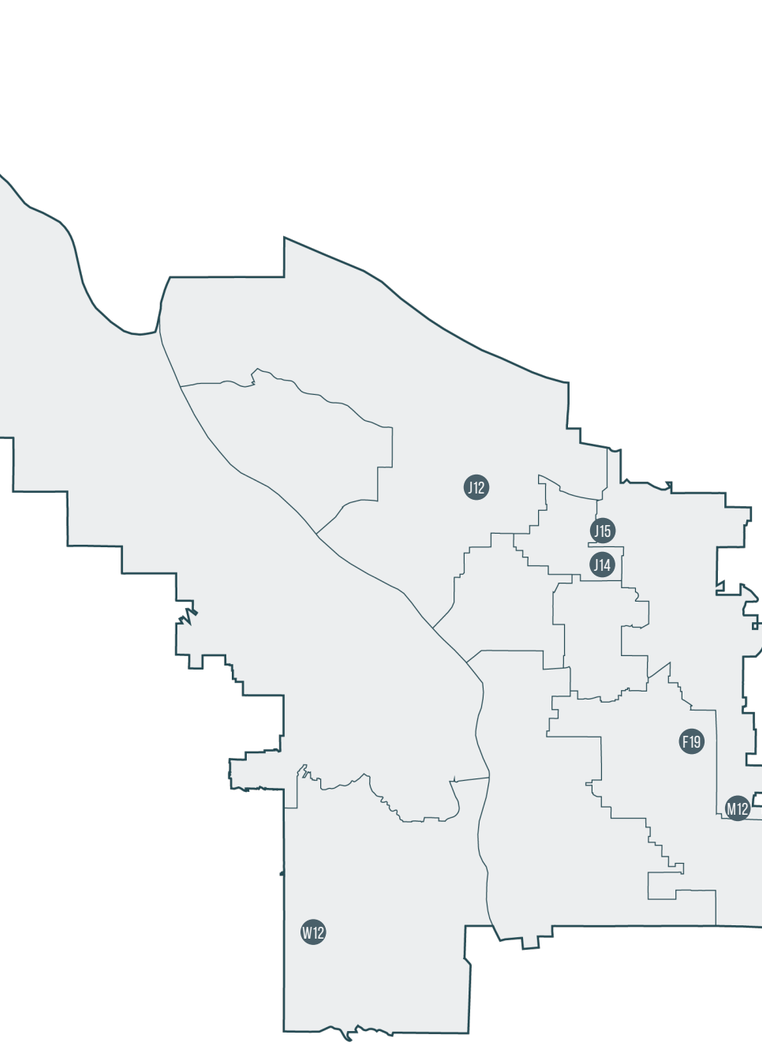
Electrical

» The site's electrical distribution system (including main switchboard and panelboards) had exceeded typical design life. This excludes the UPS and its associated panelboard (IT1) added in the more recent IT upgrade project at the facility. The existing generator (which feeds the automatic transfer switch in the Holladay Center) had also exceeded typical design life.

Arch/Struct/Site

» The standing seam roof was not accessible for assessment. During a rain event, water was observed pouring over gutters indicating a possible downspout clog, and pouring through holes caused by corrosion in the bottom of the gutter at downspout connection points.
» The interior doors, casework, toilet partitions, and floor finishes were approaching the end of design life or had exceeded design life.
» The acoustic ceiling tiles had exceeded typical design life and some were missing or damaged.
» Several of the concrete sidewalks adjacent to the main parking lot were observed to be cracked with uneven/unlevel surfaces or grass growing in the cracks causing a possible tripping hazard.
» The asphalt parking lot was observed to be cracked throughout the surface.

SWING & VACANT SITES



- J12 KENTON
- J14 MEEK
- J15 WHITAKER-ADAMS
- M12 MARSHALL
- F19 HOLLADAY ANNEX
- W12 SMITH

CAPITAL FORECAST

Kenton and Marshall serve as the district's swing sites. Marshall is a former high school and comfortably supports a high school student body. Kenton is closer in square footage and classroom count to an elementary school. Both sites currently support the programs to be sited on the Benson campus in 2024.

The district owns two vacant sites: Smith and Whitaker-Adams. Smith is a former elementary school, closed in 2005. The building is now derelict. Significant investments would be necessary before the structure could be operational. However, enrollment forecasts in the Southwest do not support reopening Smith.

District leadership identified Whitaker-Adams for future development as an athletics hub as part of the development of this plan.

SMITH K-5 SCHOOL

ADDRESS
8935 SW 52ND AVE

CONSTRUCTION DATE
1958 (PRIMARY)

LEVELS
1

BLDG AREA
37,927 SF

SITE AREA
439,085 SF
10.08 ACRES

CLASSROOMS COUNT
18

FUNCTIONAL CAPACITY
184 STUDENTS

CLUSTER
WELLS-BARNETT

MODULAR BLDG
0

ZONING
R5 RESIDENTIAL 5,000 CU

HISTORICAL SUMMARY

Smith Elementary School is situated in southwest Portland on a 10.08-acre school campus. The primary school building is a wood frame structure that rests on a poured concrete foundation. The cladding consists of a mixture of red brick, plywood panels, and T-1-11 siding. Gable roofs cover the two wings of the single-story building. The building features elements of the Northwest Regional style, including broad roof overhangs, plywood siding, and fixed windows with louvers.

Although designed to be extensible, Smith Elementary School lacks integrity due to the additions, alterations, and resulting lack of coherent building vocabulary. The school was built during the PPS program of post-war construction, but archival research does not indicate that it influenced the design of other schools buildings, the curriculum, or future planning for the schools. Therefore, it is not eligible for the NRHP under Criterion A. The architects Payne & Scott and John Storrs both had significant ties to the development of the Northwest Regional style; however this building is not a strong example of the style or of these architects' work. The alterations to the wing designed by John Storrs have significantly altered the original character of the school. Although the school exhibits characteristic features of twentieth century school design in the Northwest Regional style, due to the lack of integrity in comparison with other schools of this period in Portland, Smith Elementary School is not eligible for the NRHP under Criterion C.

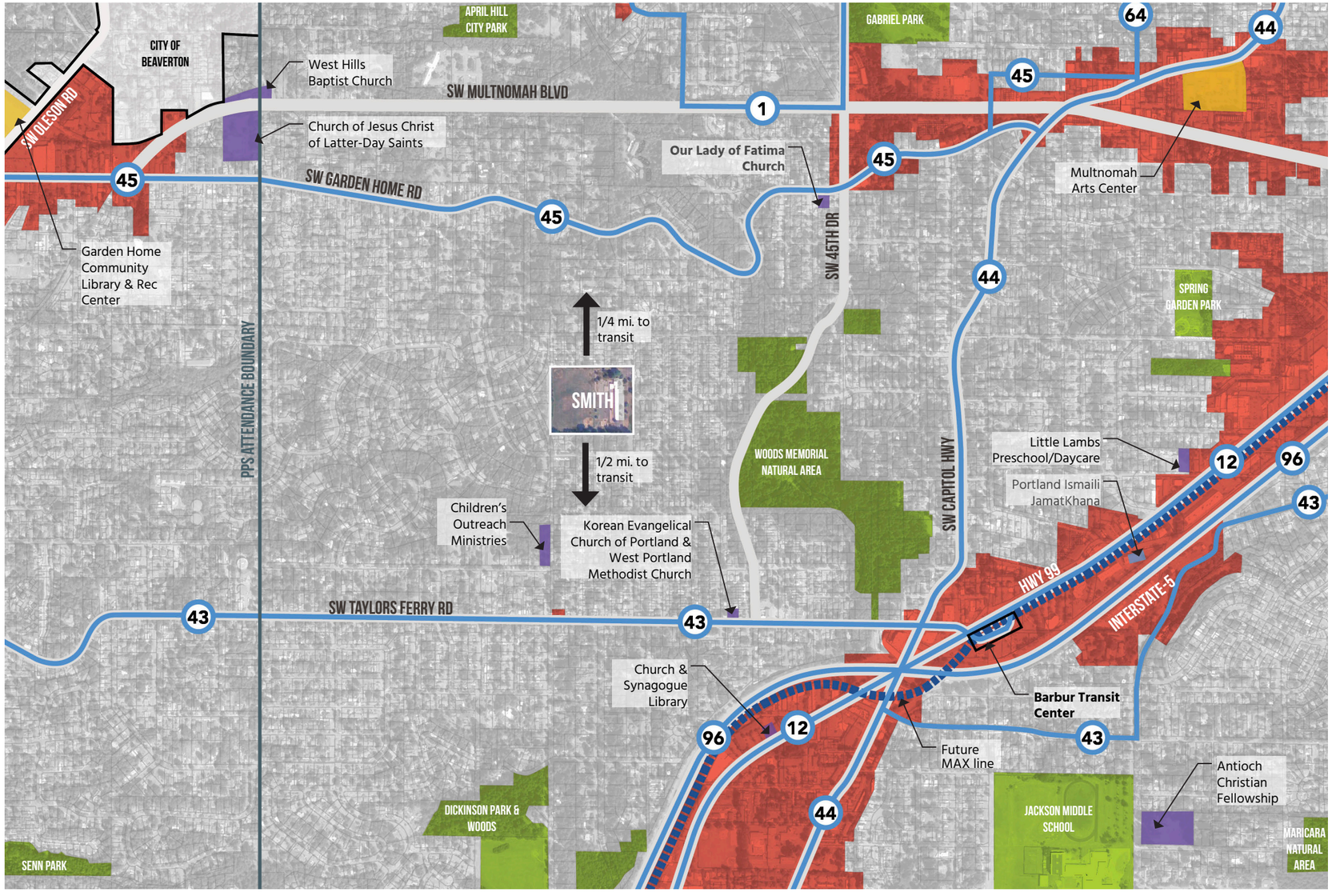
DEMOGRAPHIC CONTEXT

The Smith site is located in Census Tract 65.01, bordered by seven adjacent census tracts. PPS's attendance boundary runs to the west of the census tract that Smith falls within. In this area of the district, enrollment is projected to fall by 3% over the next 15 years.

Of the population of the Smith site census tract, up to 15% identify as BIPOC, up to 25% of households are cost-burdened, and up to 3% of children are experiencing poverty. The census tracts surrounding the site's census tract are more racially diverse (between 25% and 35% of the population identifying as BIPOC), and include a higher percentage of households experiencing cost burden (between 35% and 45%) and childhood poverty (between 7% and 15%).

Credit
U.S. Census Bureau's American Community Survey (ACS) 2014-2018 5-year estimates, December 2019 Release.

SMITH SITE PHYSICAL CONTEXT



TRANSPORTATION ACCESS

The Smith site is located in the Ashcreek neighborhood of Southwest Portland. SW Taylors Ferry Rd and SW Garden Home Rd / SW Multnomah Blvd are the primary east-west road corridors. I-5 and Hwy 99 are about a mile from the site, along with the Barbur Transit Center park and ride. The Southwest Corridor MAX light rail is planned along I-5 and would provide more convenient access to central Portland in the future. After voters declined to fund the new MAX line in 2020, the project was put on hold until funding can be identified. Major bus transit corridors are located north and south of the site.

DISTRICT CONTEXT

The site is adjacent to PPS's attendance boundary to the west. Jackson Middle School, site of a future athletic hub, is located across I-5 to the southeast. Several city parks are located to the west of the site, and Smith is located 1.5 miles from Portland Parks and Recreation's Multnomah Arts Center to the east. Tualatin Hills Park and Recreation District's Garden Home Recreation Center is located to the west, outside the PPS attendance boundary. There are no PPS Early Childhood Education locations near the site or on the west side of the Willamette River.

ADJACENT USES

The Smith site is surrounded by residential neighborhoods. Commercial areas, services, and community uses are located closer to major roads like the I-5 corridor and Multnomah Blvd.

LEGEND

- BUS LINE
- MAJOR ROAD
- FUTURE MAX LINE
- PARKS & SCHOOLS
- MIXED USE/ COMMERCIAL
- PLACE OF WORSHIP
- COMMUNITY USE

N 0 200' 400' 800'

SMITH SITE ANALYSIS

SITE ANALYSIS

The Smith site is surrounded by residential zoning (R5, R7, and R10). Dwellings were built primarily between the 1950s and 1980s, with some more recent construction. Of the surrounding roads, only SW 52nd Ave has a sidewalk, and pedestrian access points to the site are limited. The existing school building is in poor condition and has a footprint of around 43,000 gsf. A 27,000 sf paved school yard lies to the west of the existing building, and existing vehicular access enters a small parking lot at the northeast corner of the site. The site slopes about 35 feet down from southeast to northwest. A grove of mature trees borders the site to the southwest.

POTENTIAL SITE SUITABILITY

Based on the district context, transportation access, and site conditions, the Smith site could be a candidate for Early Childhood Education (to add service to the west side of the district) or potentially for an athletic spillover use connected to the future Jackson Middle School athletic hub. The site could accommodate VAPA or CTE programs depending on geographic need.

SITE ANALYSIS LEGEND

- BUS LINE
- NEIGHBORHOOD COLLECTOR
- BUS STOP
- SIDEWALK
- FENCE
- VEHICULAR ACCESS
- PEDESTRIAN SITE ACCESS

0 50' 100' 200'

MARSHALL HIGH SCHOOL

ADDRESS
3905 SE 91ST AVE

CONSTRUCTION DATE
1960 (PRIMARY)

LEVELS
4

BLDG AREA
273,646 SF

SITE AREA
1,039,342 SF
23.86 ACRES

CLASSROOMS COUNT
74

FUNCTIONAL CAPACITY
1,781 STUDENTS

CLUSTER
MCDANIEL

MODULAR BLDG
0

ZONING
IR INSTITUTIONAL RESIDENTIAL LCU

HISTORICAL SUMMARY

Marshall High School is located in the Lents neighborhood of southeast Portland. The campus includes only the main school building The three story building is largely devoid of architectural embellishments, but the internal functions of the school, such as the stair Wells-Barnett, hallways, library, auditorium, and gymnasium are clearly communicated by the building's fenestration patterns, overall massing, and varying building heights. The building mixes an external skin of variegated tan-colored brick with expansive banks of plate glass windows that form the building's curtain walls. Cantilevered overhangs shade the windows on each floor on the west and south sides, while no eaves are present on the north and east sides. The interior follows a square shaped corridor plan that provides access to all classrooms, the auditorium, cafeteria, and the gymnasium.

The square-shaped property extends northward to gain access to SE 91st Avenue. Development in the surrounding area consists primarily of single family residences built between 1945 and 1970 as well as large scale retail with the presence of large "big box" stores situated to the west at Eastport Plaza.

Despite the retention of its historical integrity, Marshall High School does not appear to be eligible for the National Register of Historic Places.

FACILITY CONDITION SUMMARY

Mechanical & Plumbing

» This facility utilized several air handling units, supply fans, and exhaust fans for heating and ventilation; most of which were original to building construction in 1960. All fans and their associated ductwork were observed to have exceeded their design life.
» While the boilers were observed to have updated controls and burners, their storage tanks and the remainder of the heating hot water system (expansion tanks, backflow preventers, piping, etc.) had exceeded its design life.
» Many water coolers throughout the facility had not been approved for water consumption due to potential lead hazards.
» All plumbing fixtures and domestic water distribution equipment was observed to have exceeded their design lives.

Fire Protection

» The fire riser located in room B-65 and its associated sprinklers appeared to be original to building construction in 1960 and had exceeded their design life.

Electrical

» Seventy-one of the 89 panels identified on site as well as two switchgears and six interior distribution transformers were observed to have all exceeded their intend design lives.
» All lighting throughout the facility was observed to have exceeded its intended design life.

Arch/Struct/Site

» The exterior enclosure (section of glazed curtain wall, aluminum windows and exterior doors) were observed to be aged and degraded.
» The roof access hatch was observed to be aged and degraded.
» The interior floor finishes (including wood stage floor in auditorium), toilet partitions, lockers, and auditorium seating observed to be aged and degraded.

DEMOGRAPHIC CONTEXT

The Marshall site is located in Census Tract 83.01, bordered by six other census tracts and located at the eastern edge of the PPS attendance boundary. In this area of the district, enrollment is projected to fall by 10% over the next 15 years, making it an area with one of the largest projected reductions in enrollment.

The Marshall site is located in an area with the highest concentration of BIPOC populations of all the alternative use sites studied; between 45% and 75% of residents in the Marshall site census tract and the tract to the east identify as BIPOC. Just to west of the site, more than 45% of residents are cost burdened, and other surrounding residents are between 30% and 45% cost burdened.

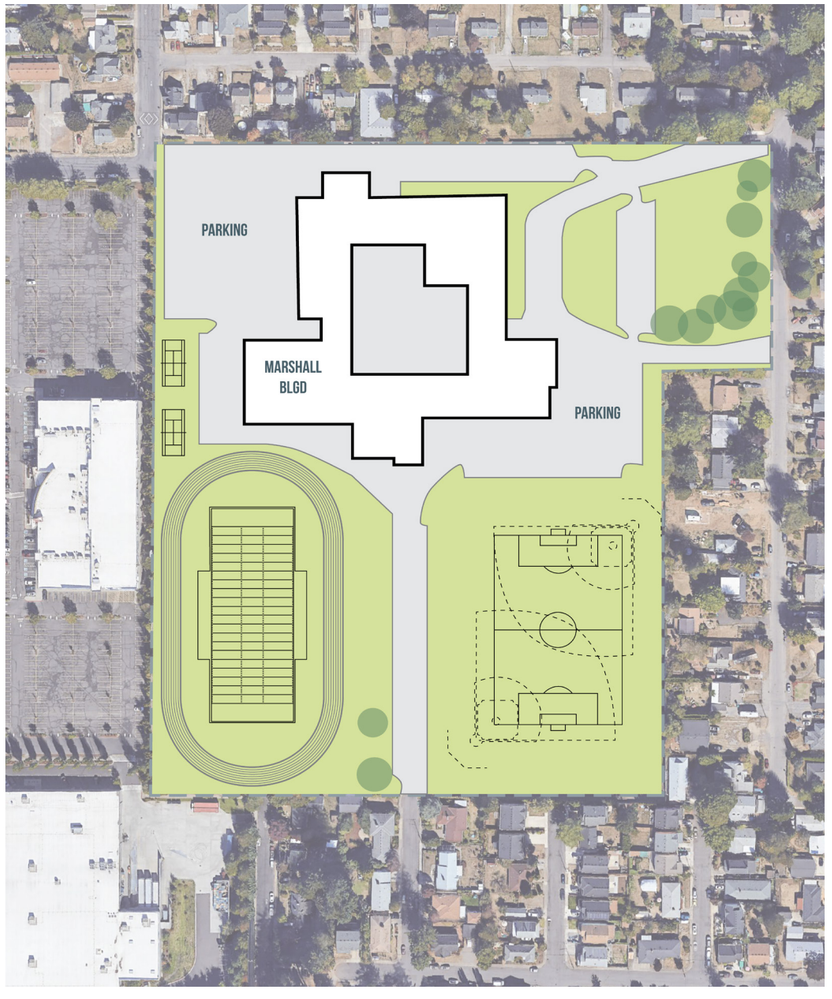
Child poverty is also high in the immediate vicinity of the site--between 30% and 74% of children are living below the poverty level in the site census tract. The demographics of this area are consistent with patterns of displacement from rapidly gentrifying neighborhoods to the west, where more diverse populations have lost a foothold, with some seeking affordability further east.

Credit

U.S. Census Bureau's American Community Survey (ACS) 2014-2018 5-year estimates, December 2019 Release.

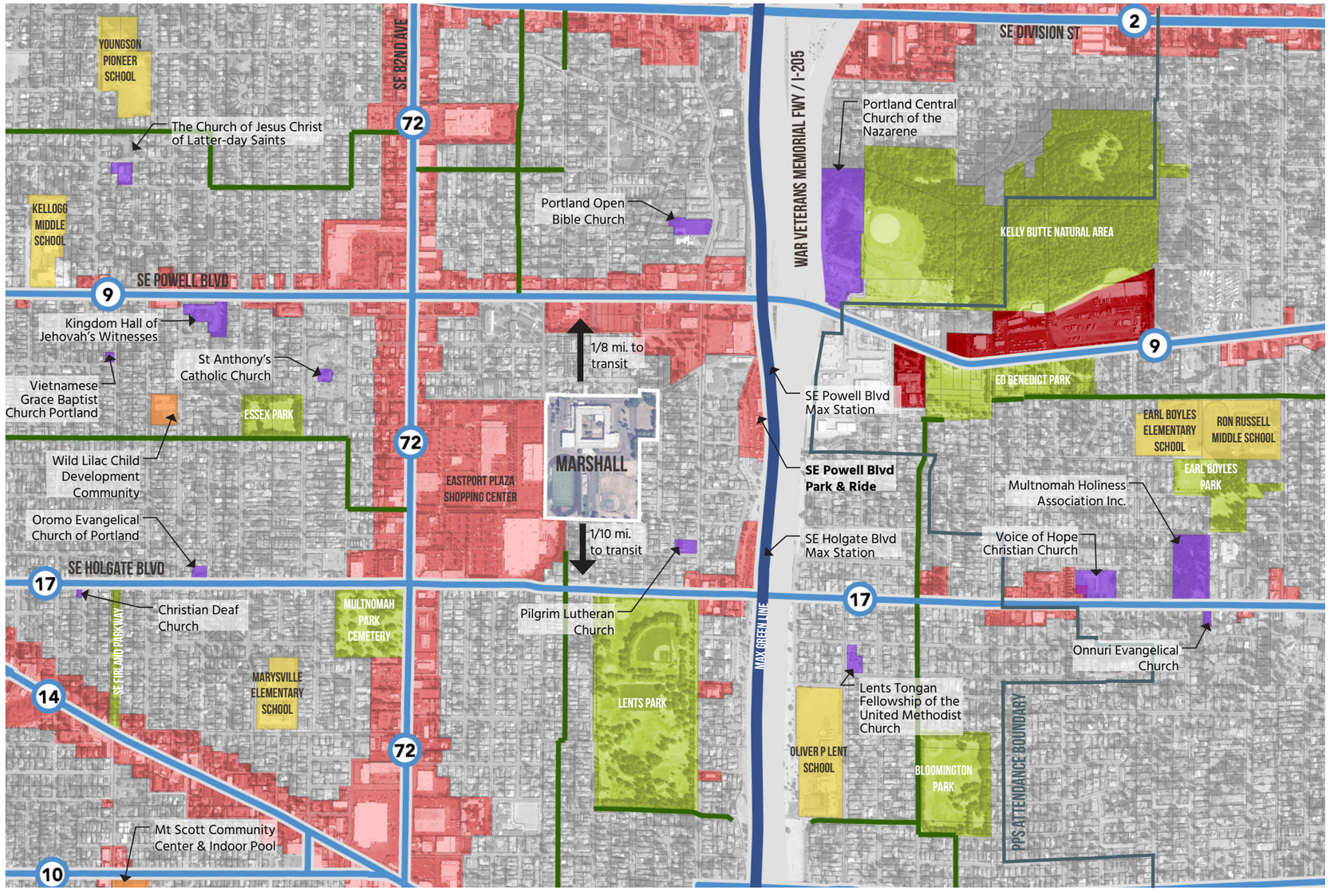
MARSHALL SITE STUDY

Existing Site



Proposed Athletics Programming

MARSHALL SITE PHYSICAL CONTEXT



TRANSPORTATION ACCESS

The Marshall site is located in the Lents neighborhood of Southeast Portland. The site sits between SE Powell Blvd (a Major City Traffic Street) and SE Holgate Blvd (Neighborhood Collector) as primary east-west road corridors and I-205 and SE 82nd Avenue as major north-south travel corridors. The MAX Green Line light rail runs adjacent to I-205, with two stops within a 5-minute walk of the site, at SE Powell and SE Holgate, providing convenient access to central Portland and other East Portland neighborhoods. Major bus transit corridors are located along SE Powell and SE Holgate with stops within a quarter mile walk of the site.

DISTRICT CONTEXT

The PPS attendance boundary runs to the east of I-205, where David Douglas School District is adjacent. Two Title I schools, Marysville and Lent (which is also an Early Childhood facility), are located to the south, and Kellogg and Youngson Pioneer School are located to the northwest. Marshall is located within a 5-minute walk from Lents Park with its baseball stadium and soccer field. Three parks east of I-205: Kelly Butte, Ed Benedict and Bloomington parks.

ADJACENT USES

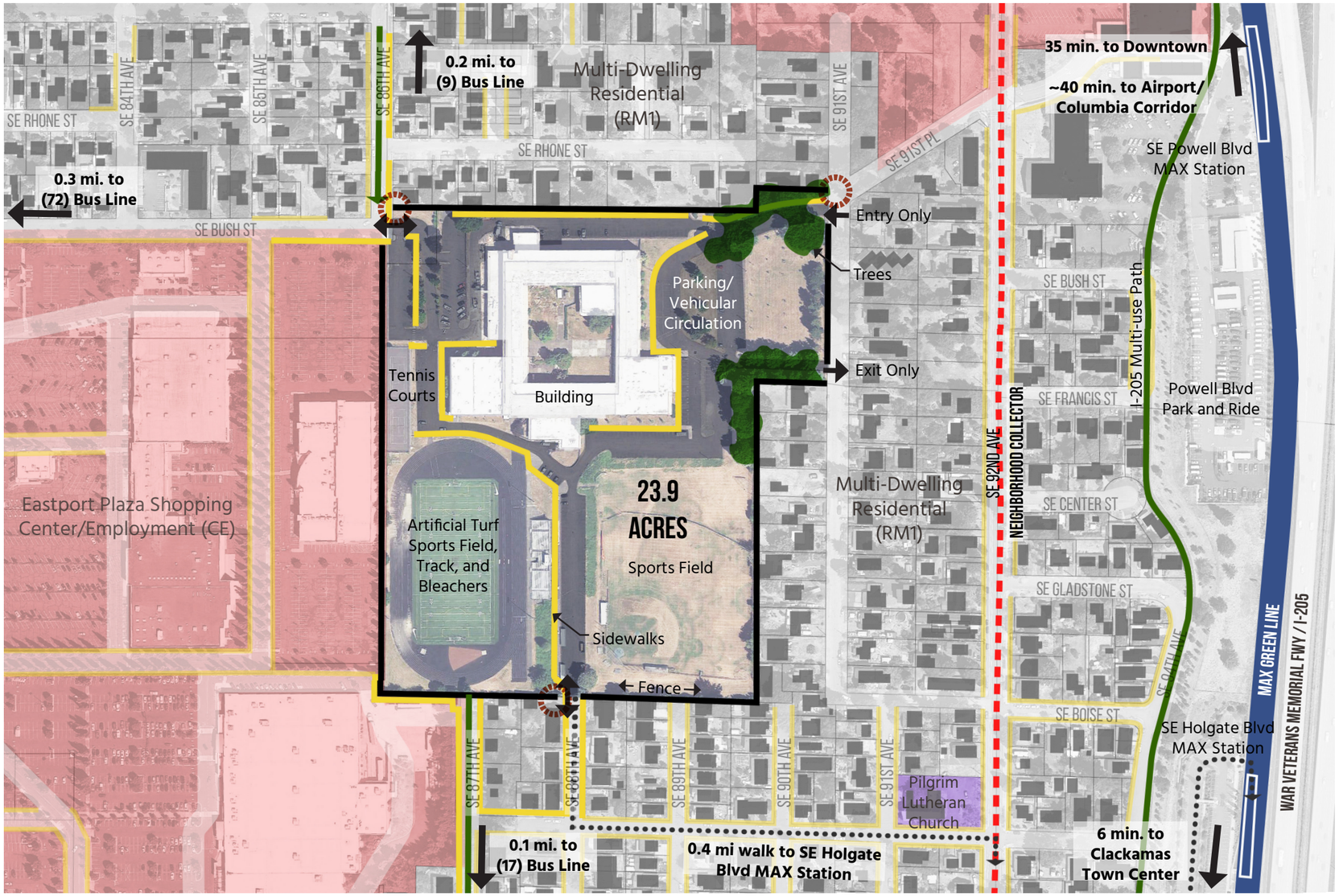
The Marshall site is surrounded by residential neighborhoods to the north and south east with a mix of housing types. The large Eastport Plaza retail center adjoins the site to the west and smaller commercial pockets are located along SE Powell Blvd.

LEGEND

- BUS LINE
- NEIGHBORHOOD GREENWAY
- MAJOR ROAD
- EXISTING MAX LINE
- PARKS
- EMPLOYMENT
- MIXED USE/ COMMERCIAL
- PLACE OF WORSHIP
- COMMUNITY USE
- SCHOOLS

0 200' 400' 800'

MARSHALL SITE ANALYSIS



SITE ANALYSIS

The Marshall site is surrounded by multi-dwelling zoning (RM1) to the east, north and south and commercial zoning on the Eastport Plaza center to the west. The existing 220,000 gsf building is in fair condition. The building is ringed by 4 acres of surface parking lots, and sports fields are located south of the building, flanking the main entry drive extending north from SE 88th Ave. Existing vehicular access enters on this main drive as well as into parking lots at the northeast and northwest corners of the site. Most surrounding roads have sidewalks, except for SE 91st Avenue. There are three main pedestrian access points to the site. A City Bikeway traverses the site north-south, and the I-205 multi-use path is located 2 blocks west. The site is flat. Some mature trees are located east of the building.

POTENTIAL SITE SUITABILITY

Program capital forecasts identified the need for district-wide athletic and CTE hubs at this location. The site's topography, existing fields, and building capacity support these uses, and its robust transit access makes it a logical location for a district hub.

LEGEND

- BUS LINE
- NEIGHBORHOOD COLLECTOR
- CITY BIKEWAY
- SIDEWALK
- FENCE
- VEHICULAR ACCESS
- PEDESTRIAN SITE ACCESS

0 50' 100' 200'

KENTON SCHOOL

ADDRESS
7528 N FENWICK AVE

CONSTRUCTION DATE
1913 (PRIMARY)

LEVELS
3

BLDG AREA
66,599 SF

SITE AREA
172,498 SF
3.96 ACRES

CLASSROOMS COUNT
18

FUNCTIONAL CAPACITY
NA

CLUSTER
JEFFERSON*

MODULAR BLDG
3

ZONING
R1 RESIDENTIAL 1,000 CU

HISTORICAL SUMMARY

Kenton School is situated in the Kenton neighborhood of North Portland. The campus occupies a 4 acre, rectangular parcel on the north side of Lombard Avenue. Development in the surrounding area consists primarily of single family residences built between 1900-1950. More recent development includes multi-family buildings and commercial businesses are located on the arterial streets within the vicinity of the school particularly on the south side of Lombard and along Interstate Avenue to the east. The campus consists of a primary rectangular-shaped building with an attached gymnasium and auditorium and three portables located at the south side of the property.

In comparison with other Portland schools during the same period and constructed of similar styles, the building retains a high degree of integrity and is therefore eligible for the National Register of Historic Places under Criterion A as an example of school planning and the use of the extensible school type to accommodate the rapidly expanding population of Portland. The school is significant as an extensible school building type and is significant under Criterion C. While the building is notable for its Mediterranean Revival style terra cotta detailing, superior examples of the style are found in other schools such as at Irvington.

FACILITY CONDITION SUMMARY

Mechanical & Plumbing

» The majority of the plumbing fixtures had exceeded their typical design lives. A portion of the domestic water distribution had been replaced; however, many of the existing plumbing fixtures were noted to have lead present in the system and the water is not safe for consumption. The water heater was recently replaced, but most of the other domestic water distribution equipment has exceeded its typical design life and should be replaced.

» The vast majority of the heating equipment, air handlers, exhaust fans, and associated equipment had exceeded their typical design lives. Heating equipment and exhaust fans serving the auto shop and work shop areas did not have any major deficiencies.

Fire Protection

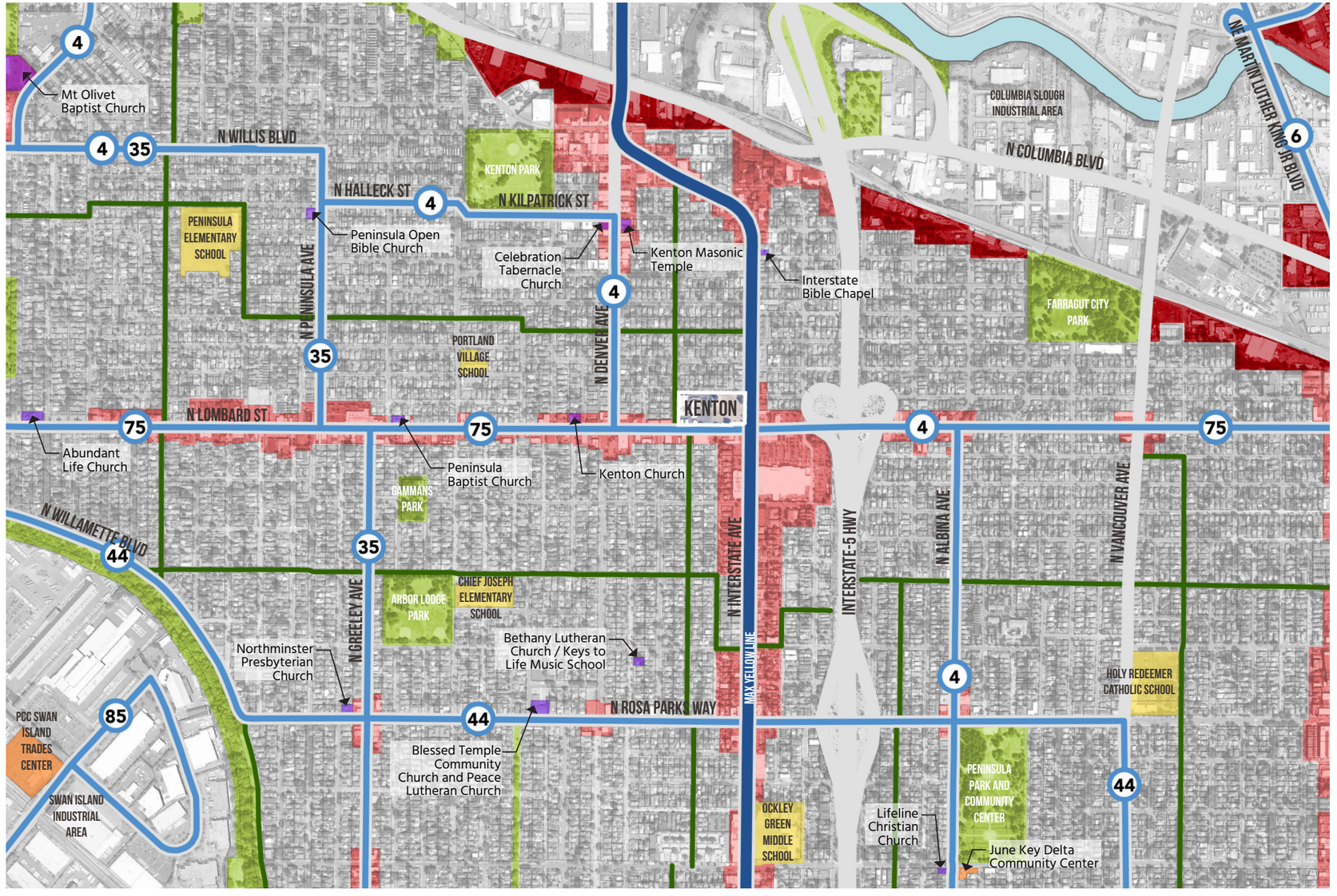
DEMOGRAPHIC CONTEXT

The Kenton site is located in Census Tract 38.01, bordered by four adjacent census tracts. In this area of the district, enrollment is projected to rise by 3% over the next 15 years.

Of the population of the Kenton site census tract, between 25% and 35% identify as BIPOC, about one third of households are cost burdened, and between 7% and 15% of children are experiencing poverty. The census tracts to the east and north are more racially diverse (35% to 45% of the population identifying as BIPOC), and include a higher percentage of households experiencing cost burden (up to 45%). Childhood poverty is more pronounced in the outer reaches of the site's context along the Columbia corridor and toward St. Johns as well as further east and south.

Credit
U.S. Census Bureau's American Community Survey (ACS) 2014-2018 5-year estimates, December 2019 Release.

KENTON SITE PHYSICAL CONTEXT



TRANSPORTATION ACCESS

The Kenton site is located in the Kenton neighborhood of North Portland. The site is located on N Lombard St, a District Collector that extends west to St Johns. N Interstate Avenue is a Neighborhood Collector running north-south on the east edge of the site. Interstate 5 provides regional vehicular access 3 blocks to the east on Lombard. The MAX Yellow Line light rail runs along Interstate Ave, providing convenient access to central Portland and employment areas to the south of Portland. N Lombard is a major bus corridor. A Neighborhood Greenway bike route runs along the west edge of the site on N Fenwick Ave., with an additional east-west route on N Terry St north of the site.

DISTRICT CONTEXT

The site is within PPS's attendance boundary. Peninsula Elementary School is the closest PPS facility. Kenton Park and Farragut Park are large neighborhood park facilities within 1 mile of the site. The Kenton site was leased until this year by De La Salle HS, who have vacated the building and moved to St Charles Church on NE 42nd Ave.

ADJACENT USES

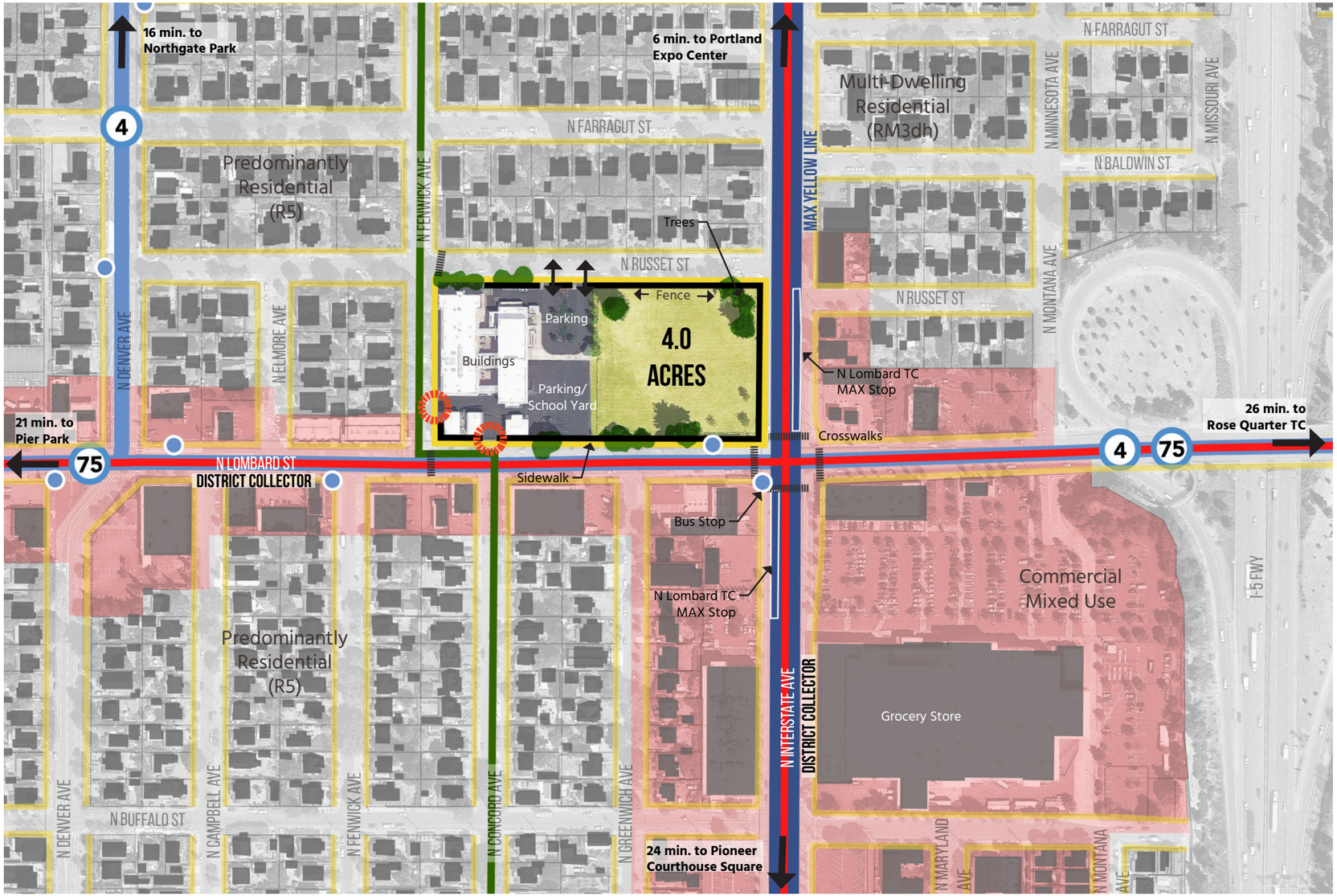
The Kenton site is located within a bustling hub of transit waiting areas, large commercial uses including a grocery store, and smaller commercial along N Lombard St. There are few community uses or places of worship surounding the site.

LEGEND

- BUS LINE
- NEIGHBORHOOD GREENWAY
- MAJOR ROAD
- EXISTING MAX LINE
- PARKS
- EMPLOYMENT
- MIXED USE/ COMMERCIAL
- PLACE OF WORSHIP
- COMMUNITY USE
- SCHOOLS

0 200' 400' 800'

KENTON SITE ANALYSIS



SITE ANALYSIS

The Kenton site is surrounded to the north and west by predominantly single-family homes, within R5 zoning. N Interstate and N Lombard St are District Collectors. All surrounding streets have sidewalks, and there are pedestrian access points to the site on the north, west and south sides of the site. There are 5 buildings on the site, including a large original 2-story structure built in 1913, with an adjacent gymnasium. Three small classroom portables are located along N Lombard. A paved school yard and two parking lots accessed from N Lombard and N Russet lie to the east of the existing buildings and a large grassy sportsfield occupies the eastern half of the flat site. Some mature conifers line the southern edge of this field.

POTENTIAL SITE SUITABILITY

While athletics program need in North Portland is high, the site capacity is limited for athletic fields. Early childhood may not be compatible with the surrounding levels of traffic, but a small new facility could be accommodated along N Russet St. If the existing historic building was updated and preserved, this site could be repurposed as a future arts magnet school with the addition of a new theater and central storage area for

VAPA materials.

LEGEND

- BUS LINE
- DISTRICT COLLECTOR
- CITY BIKEWAY
- EXISTING MAX LINE
- MAX STOP
- BUS STOP
- SIDEWALK
- FENCE
- VEHICULAR ACCESS

N 0 50' 100' 200'

MEEK PROF TECH SCHOOL

ADDRESS
4039 NE ALBERTA CT

CONSTRUCTION DATE
1953 (PRIMARY)

LEVELS
1

BLDG AREA
35,945 SF

SITE AREA
234,353 SF
5.38 ACRES

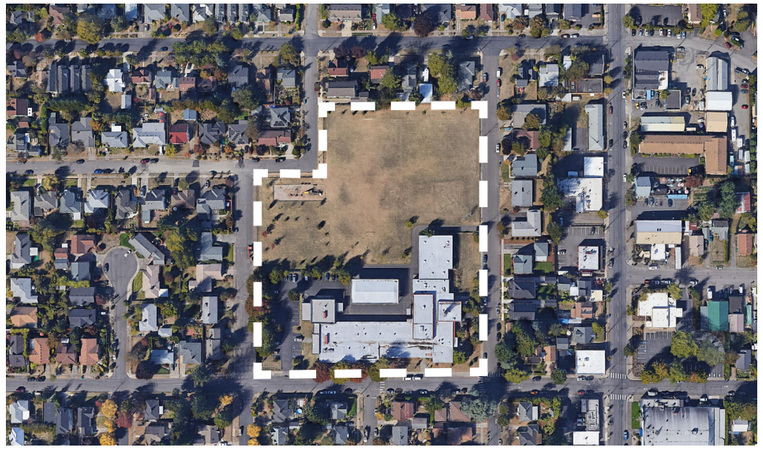
CLASSROOMS COUNT
16

FUNCTIONAL CAPACITY
441 STUDENTS

CLUSTER
MCDANIEL

MODULAR BLDG
0

ZONING
R5 RESIDENTIAL 5,000 CU



HISTORICAL SUMMARY

Originally the Alberta Court (Meek) Elementary School when it was constructed in 1953, this Modernist Vernacular style building is situated on a grass and asphalt-covered campus. Clad in red brick, the wood frame structure sits on a poured concrete foundation. The single story building is covered by flat and slightly pitched roofs. The L-shaped plan houses classrooms, a cafetorium, a library, a music room, and an administrative office. Situated in a primarily residential neighborhood in Northeast Portland, the Meek Professional Technical High School was originally constructed in 1953, as the Alberta Court (Meek) Elementary School. The playground, play shed, and playfields are located directly north and northwest of the school. The parking area is located directly west of the building.

The school was built in response to the residential development in northeast Portland during the PPS program of post-war construction and is eligible for the NRHP under Criterion A.

FACILITY CONDITION SUMMARY

Mechanical & Plumbing

» The majority of the plumbing fixtures had exceeded their typical design lives. A portion of the domestic water distribution had been replaced; however, many of the existing plumbing fixtures were noted to have lead present in the system and the water is not safe for consumption. The water heater was recently replaced, but most of the other domestic water distribution equipment has exceeded its typical design life and should be replaced.
» The vast majority of the heating equipment, air handlers, exhaust fans, and associated equipment had exceeded their typical design lives. Heating equipment and exhaust fans serving the auto shop and work shop areas did not have any major deficiencies.

Fire Protection

» The building was observed to have a wet-pipe sprinkler system providing coverage of approximately 25% of the overall building. The piping and sprinkler heads were estimated to be original to the building and had exceeded their typical design life.
» An addressable fire alarm system headend (Silent Knight 5208) and associated detection and signal devices were installed in 2004.

Electrical

» The building's main electrical switchboard was upgraded in 1998; however, the majority of the panelboards had exceeded their typical design lives. This did not include three panelboards added in 1997 and two more added in 2004 as part of various upgrades.

Arch/Struct/Site

» The roof hatch had exceeded typical design life. The roof hatch had weak springs, aged hardware and missing seals.
» The remaining exterior architectural components are planned for future assessment.

DEMOGRAPHIC CONTEXT

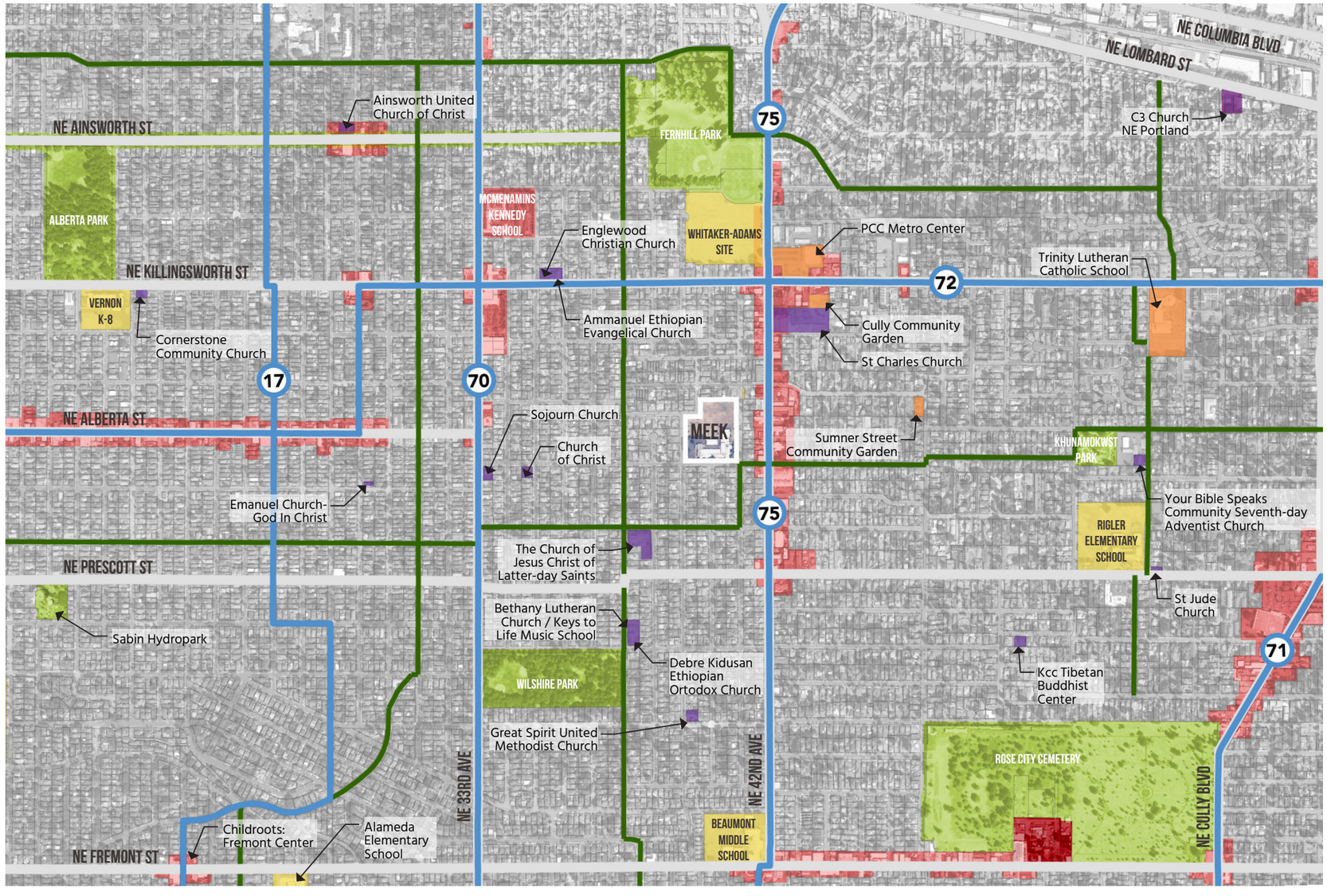
The Meek site is located in Census Tract 30, surrounded by five other census tracts. Enrollment is projected to increase by 6% over the next 15 years in this area of the district.

While the site's census tract contains relatively lower child poverty rates and housing cost burdened families, it is important to note that just east of the site, across NE 42nd Ave, the census tracts are significantly more diverse (between 45% to 75% identifying as BIPOC), more cost-burdened (between 35% to 45% of households), and experiencing higher rates of childhood poverty (between 30% and 74% of households). This pattern is consistent with recent gentrification and displacement pushing eastward in this area of Portland. It also overlaps with strong efforts by local community organizations to fight displacement by building affordable housing units in the Cully neighborhood on the east side of NE 42nd Ave.

Credit

U.S. Census Bureau's American Community Survey (ACS) 2014-2018 5-year estimates, December 2019 Release.

MEEK SITE PHYSICAL CONTEXT



TRANSPORTATION ACCESS

The Meek site is located in the Concordia neighborhood of NE Portland. The site is easily accessible by multiple modes of transportation. Major nearby road corridors include NE Killingsworth, a District Collector, and NE Prescott St, a Neighborhood Collector. NE 42nd Avenue (Neighborhood Collector) is a commercially-oriented corridor one block to the east. Bus transit serves NE Killingsworth and NE 42nd. A Major City Bikeway/Neighborhood Greenway runs north-south within 2 blocks of the site's west edge on NE 37th and another runs east-west and touches the site's southeast edge, making the site easily accessible by bike and on foot from surrounding neighborhoods.

DISTRICT CONTEXT

Meek is a Title I CSI school currently being used as a campus for Alliance High School CTE programs. Rigler ES is 1/2-mile to the east along Prescott, Beaumont MS (a Title I, TSI school) is south along NE 42nd, and the vacant Whitaker-Adams site is north on NE 42nd, south of Fernhill Park.

ADJACENT USES

The Meek site is surrounded by residential neighborhoods.

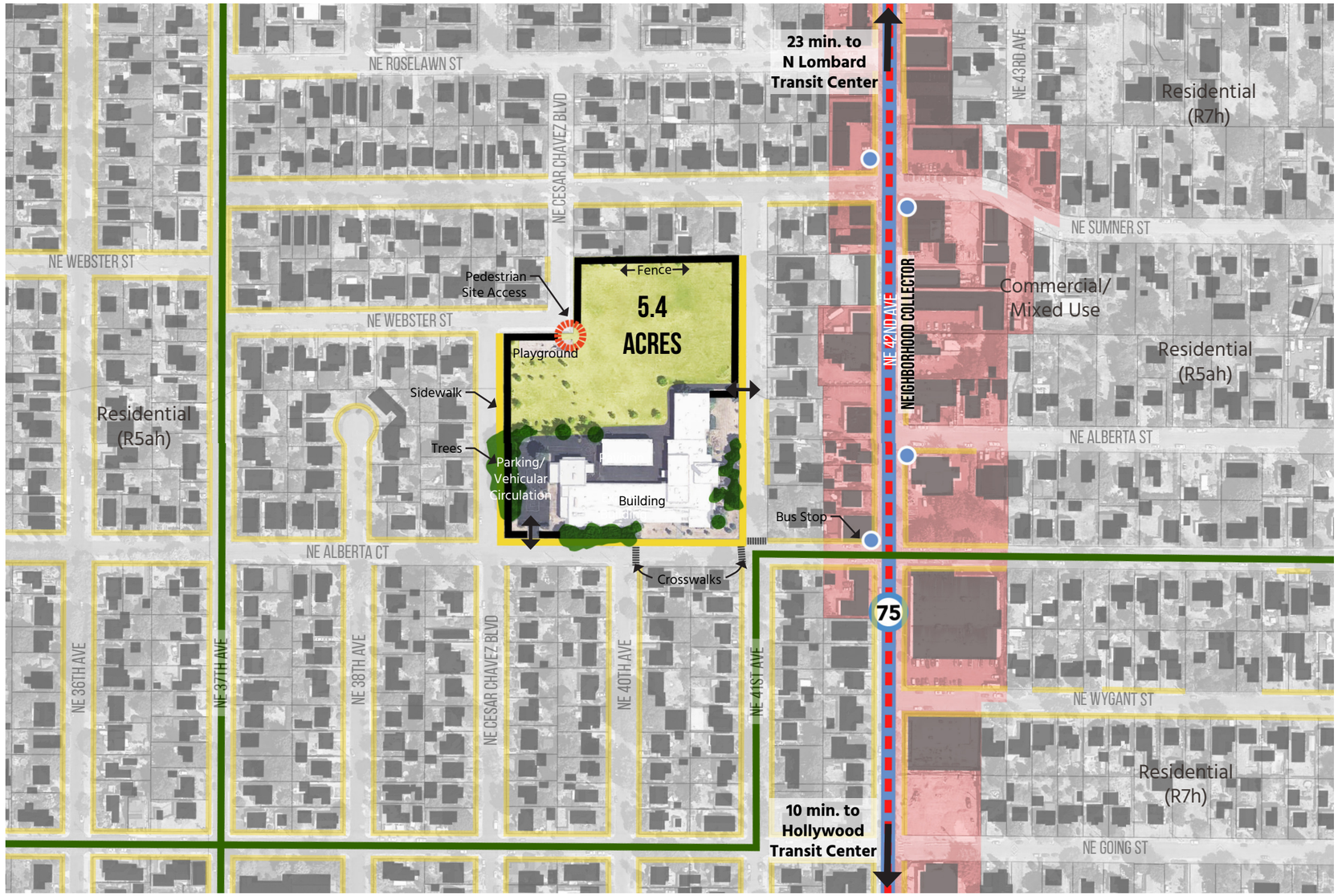
Commercial areas, services, and community uses are located nearby, along NE 42nd Avenue, with a node of activity at the corner of NE Killingsworth, including PCC's Metro Center, which will include space for community organizations and affordable housing managed by Home Forward.

LEGEND

- BUS LINE
- NEIGHBORHOOD GREENWAY
- MAJOR ROAD
- PARKS
- MIXED USE/ COMMERCIAL
- EMPLOYMENT
- PLACE OF WORSHIP
- COMMUNITY USE
- SCHOOLS

0 200' 400' 800'

MEEK SITE ANALYSIS



SITE ANALYSIS

The site is surrounded by residential blocks, primarily single-family detached homes. The surrounding sidewalk network is incomplete, with notable gaps on NE 41st Avenue and NE Cesar Chavez, as well as the south side of NE Alberta Court. The sidewalk network is lacking east of NE 42nd Ave. There are pedestrian access points to the site from the south and NW. The existing school building has a footprint of around 37,000 gsf. A fenced grassy school yard and playground occupies the northern half of the site, including a covered play area immediately north of the school building. Existing vehicular access enters a small parking lot at the southwest corner of the site. The site is flat.

POTENTIAL SITE SUITABILITY

The building could be renovated or replaced to house a variety of PPS programs. For example, the site could be repurposed as a STEAM facility for nearby Beaumont MS. Its quiet but well-connected location could make it a good site for VAPA or other specialized uses. Its proximity to more affordable and diverse residential areas and its existing outdoor play area could also make it a candidate for early childhood services depending on local demand and potential partnerships.

LEGEND

- BUS LINE
- NEIGHBORHOOD COLLECTOR
- CITY BIKEWAY
- BUS STOP
- SIDEWALK
- FENCE
- VEHICULAR ACCESS
- PEDESTRIAN SITE ACCESS

0 50' 100' 200'

WHITAKER - ADAMS VACANT SITE

ADDRESS
5700 NE CESAR E CHAVEZ BLVD

CONSTRUCTION DATE
NA

LEVELS
NA

BLDG AREA
NA

SITE AREA
437,778 SF
10.05 ACRES

CLASSROOMS COUNT
NA

FUNCTIONAL CAPACITY
NA

CLUSTER
NA

MODULAR BLDG
NA

ZONING
CM2 COMMERCIAL MIXED USE 2
R5 RESIDENTIAL 5,000 CU

HISTORIC SUMMARY

First a high school and later, in 1983, a middle school, the Whitaker-Adams site has been vacant since 2007 following the discovery of radon and black mold in the existing school.

DEMOGRAPHIC CONTEXT

The Whitaker-Adams site is located in Census Tract 36.03, bordered by six adjacent census tracts. In this cluster, enrollment is projected to fall by 10% over the next 15 years.

For site census tract, 25% to 35% identify as BIPOC, between 35% and 45% of households are cost-burdened, and between 7% and 15% of children are experiencing poverty.

The census tracts to the east of Whitaker-Adams are more racially diverse (between 45% and 75% of the population identifying as BIPOC). Childhood poverty is also more prevalent to the east, with between 30% and 74% of children under the poverty line.

Credit

U.S. Census Bureau's American Community Survey (ACS) 2014-2018 5-year estimates, December 2019 Release.

EDUCATIONAL PROGRAM FORECAST

Whitaker-Adam is one of three athletics hubs identified by athletics program leadership. As a shared resource across several schools, hubs are a viable path toward expanding existing athletics programming for smaller sites and alleviating schedule constraints regionally.

Most schools do not have enough land area for multiple fields, seating, and lighting. Only one high school site supports comprehensive athletics programming: McDaniel; even McDaniel presents scheduling challenges for a three-tiered athletics schedule.

If developed into an athletics hub, Whitaker-Adams would serve programs at Roosevelt, Grant, Jefferson, and McDaniel by providing:

- Football field with artificial turf
- Two soccer fields with artificial turf
- Three baseball/softball fields
- Bleacher seating around baseball/softball fields
- 4 basketball courts
- 6-lane olympic sized pool
- Storage and support buildings

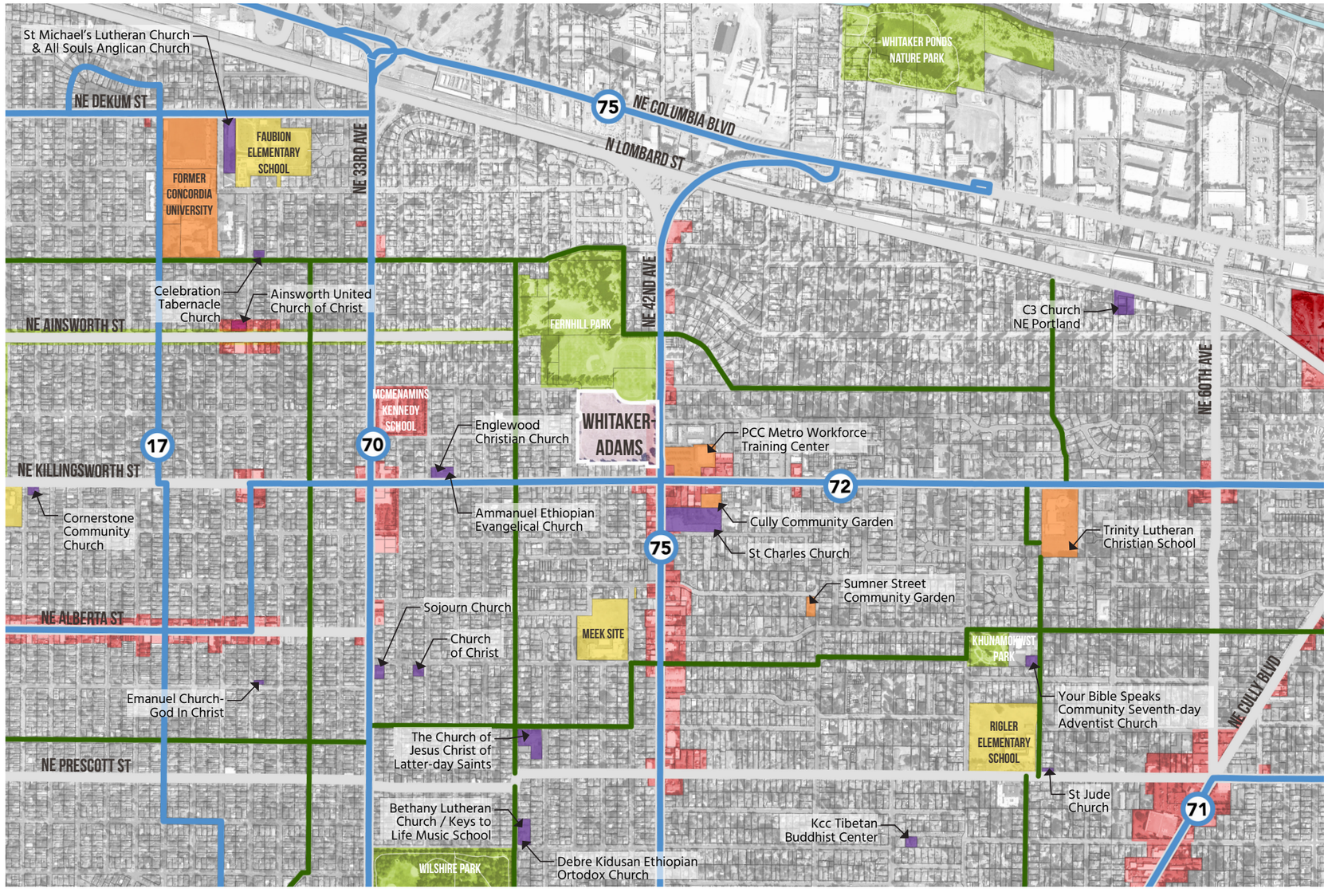
Note: Confirm middle school system capacity in the area before planning for this site (Ref: Board Resolution 3195).

WHITAKER-ADAMS SITE STUDY

Existing Site

Proposed Athletics Programming

WHITAKER-ADAMS SITE PHYSICAL CONTEXT



TRANSPORTATION ACCESS

The Whitaker-Adams site is located in the Concordia neighborhood of Northeast Portland. The east edge of the site faces NE 42nd Ave, a Neighborhood Collector on which the 75 bus line operates. The 70 bus line on NE 33rd Ave is a 1/4 mile walk to the west. NE Killingsworth, a District Collector, is located a half-block to the south of the site. A Major City Bikeway/Neighborhood Greenway runs north-south within 2 blocks of the site's west edge on NE 37th.

DISTRICT CONTEXT

Faubion K-8, and an Early Childhood facility, is a 1.2 mile walk to the northwest, the Meek site (currently Alliance HS) is a 1/2 mile walk directly south, and Rigler ES is a 1.3 mile walk southeast.

ADJACENT USES

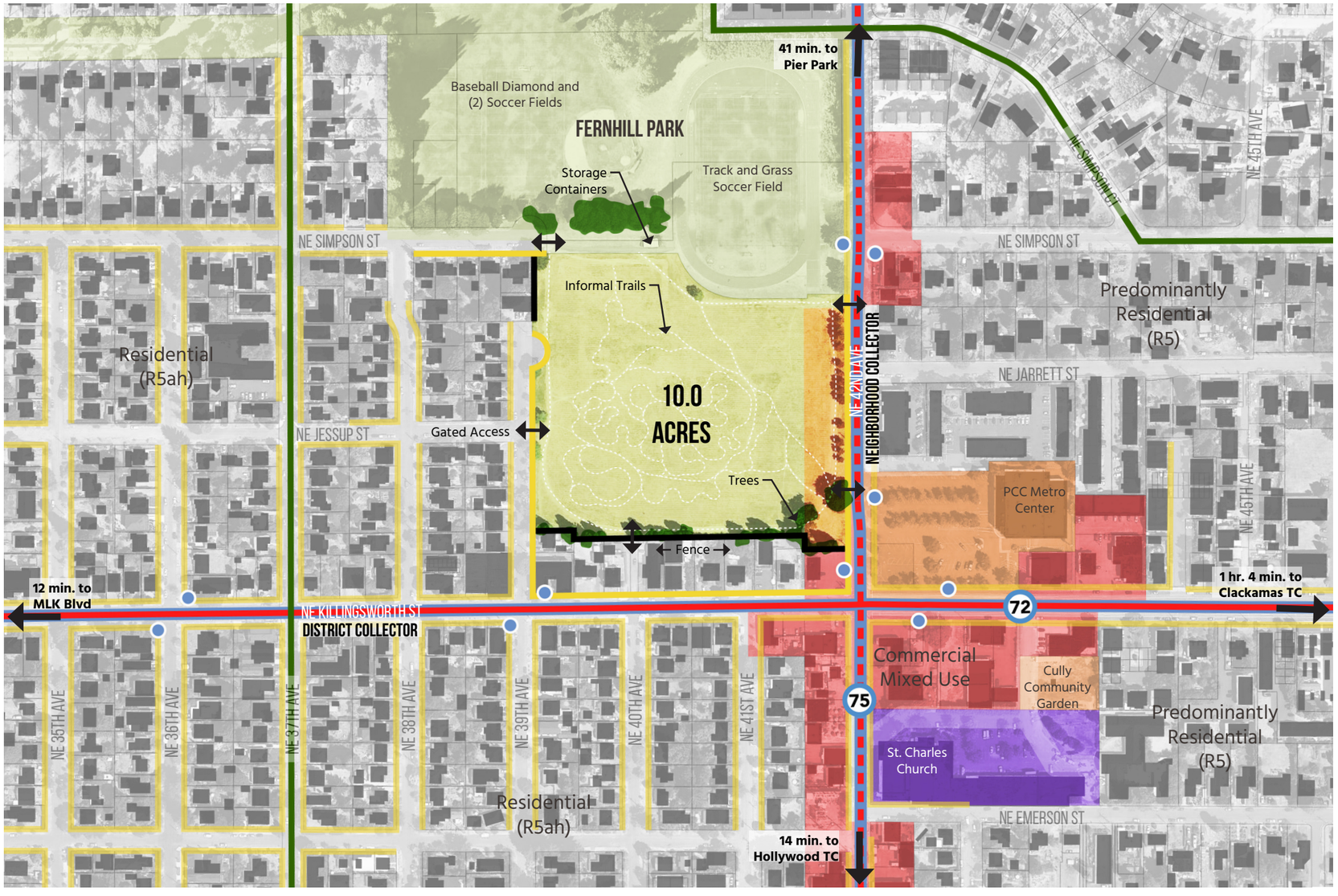
The site shares its north edge with Fernhill Park, with multiple existing sports fields that PPS already utilizes. PCC Metro Center is directly to the east, across NE 42nd Ave., with the Cully Community Garden located across the street. Commercial uses line NE 42nd Avenue. A residential neighborhood (zoned R5ah) north of Fernhill Park separates the site from the Columbia Blvd industrial corridor.

LEGEND

- BUS LINE
- NEIGHBORHOOD GREENWAY
- MAJOR ROAD
- EXISTING MAX LINE
- PARKS
- EMPLOYMENT
- MIXED USE/ COMMERCIAL
- PLACE OF WORSHIP
- COMMUNITY USE
- SCHOOLS

0 200' 400' 800'

WHITAKER-ADAMS SITE ANALYSIS



SITE ANALYSIS

The 10-acre site is located adjacent to Fernhill Park to the north. It is treated as an informal park by a range of users, including cyclists that have created a network of trails. Four saplings have been recently planted at the top of the hill. The site slopes gently downhill from south to north. The site is separated from NE Killingsworth St to the south by a half-block of housing (zoned RM1h); backyards face the site at this edge.

Most surrounding streets have sidewalks, providing safe access to the site from NE Simpson, NE Jessup, NE 42nd and NE 40th. No parking currently exists on the site, but surrounding streets include on-street parking. NE 42nd Ave is a Neighborhood Collector and may require upgrades with major redevelopment.

LEGEND

- BUS LINE
- DISTRICT COLLECTOR
- NEIGHBORHOOD COLLECTOR
- CITY BIKEWAY
- BUS STOP
- SIDEWALK
- FENCE
- VEHICULAR ACCESS

0 50' 100' 200'

HOLLADAY ANNEX

ADDRESS
7100 SE DIVISION ST

CONSTRUCTION DATE
1961 (PRIMARY)

LEVELS
2

BLDG AREA
29,800 SF

SITE AREA
93,218 SF
2.14 ACRES

CLASSROOMS COUNT
4

FUNCTIONAL CAPACITY
75 STUDENTS

CLUSTER
FRANKLIN

MODULAR BLDG
0

ZONING
R2 RESIDENTIAL 2,000 CU

DEMOGRAPHIC CONTEXT

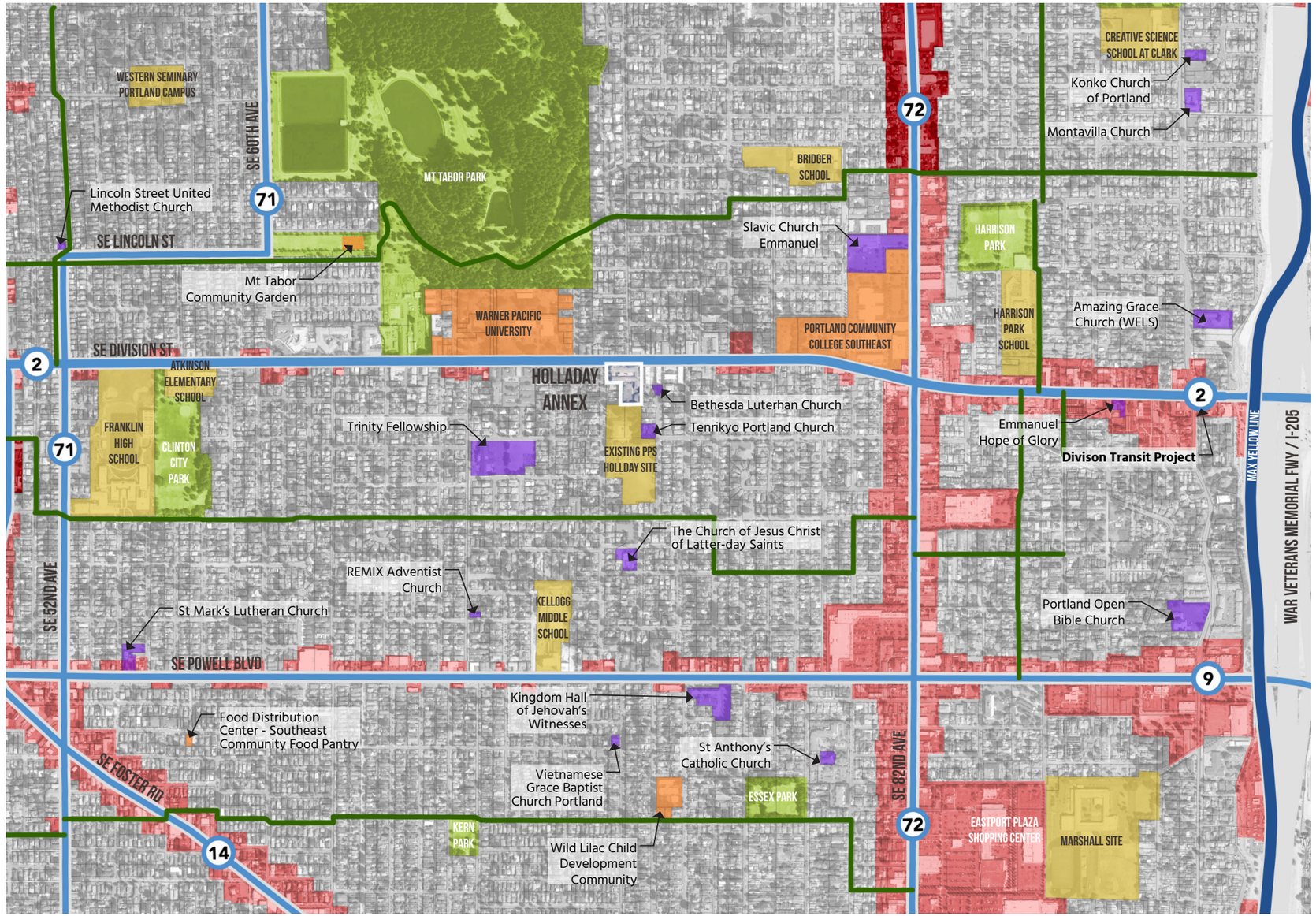
The Holladay Annex site is located in Census Tract 7.01, bordered by five adjacent census tracts. PPS's attendance boundary runs to the east of the site's adjacent census tract. In this area of the district, enrollment is projected to fall by 5% over the next 15 years.

Of the population of the Holladay Annex site census tract, between 25% and 35% identify as BIPOC, between 25% and 30% of households are cost-burdened, and between 3% and 7% of children are experiencing poverty. The census tracts east of the site are more racially diverse (between 45% and 75% of the population identifying as BIPOC), and include a higher percentage of households experiencing cost burden (more than 45% in some areas) and childhood poverty (between 30% and 74% just east of the site).

Credit
U.S. Census Bureau's American Community Survey (ACS) 2014-2018 5-year estimates, December 2019

Release.

HOLLADAY ANNEX SITE PHYSICAL CONTEXT



TRANSPORTATION ACCESS

The Holladay site is located in the South Tabor neighborhood of East Portland. The northern edge of the site faces directly onto SE Division St, a Neighborhood Collector where the Division Transit Project features frequent bus service. SE Powell Blvd, a primary east-west road corridor is a half-mile walk from the site. SE 82nd Ave is the major north-south road corridor that lies 0.65 miles to the east, with I-205 located a mile east of the site. A Neighborhood Greenway runs east-west along SE Woodward 1/4-mile to the south.

DISTRICT CONTEXT

Holladay Annex is adjoined with the existing Youngson Pioneer School, an elementary special education program. The site is close to other PPS schools, including Kellogg MS, Atkinson ES, Franklin HS, Bridger School, and Harrison Park School. The Marshall site is 1.5 miles to the southeast, across SE 82nd Ave and south of SE Powell Blvd. Mt Tabor Park is a 0.4 mile walk to the northeast through the Warner Pacific University campus. PCC Southeast is also nearby, 1/3 of a mile to the east on the north side of SE Division St.

ADJACENT USES

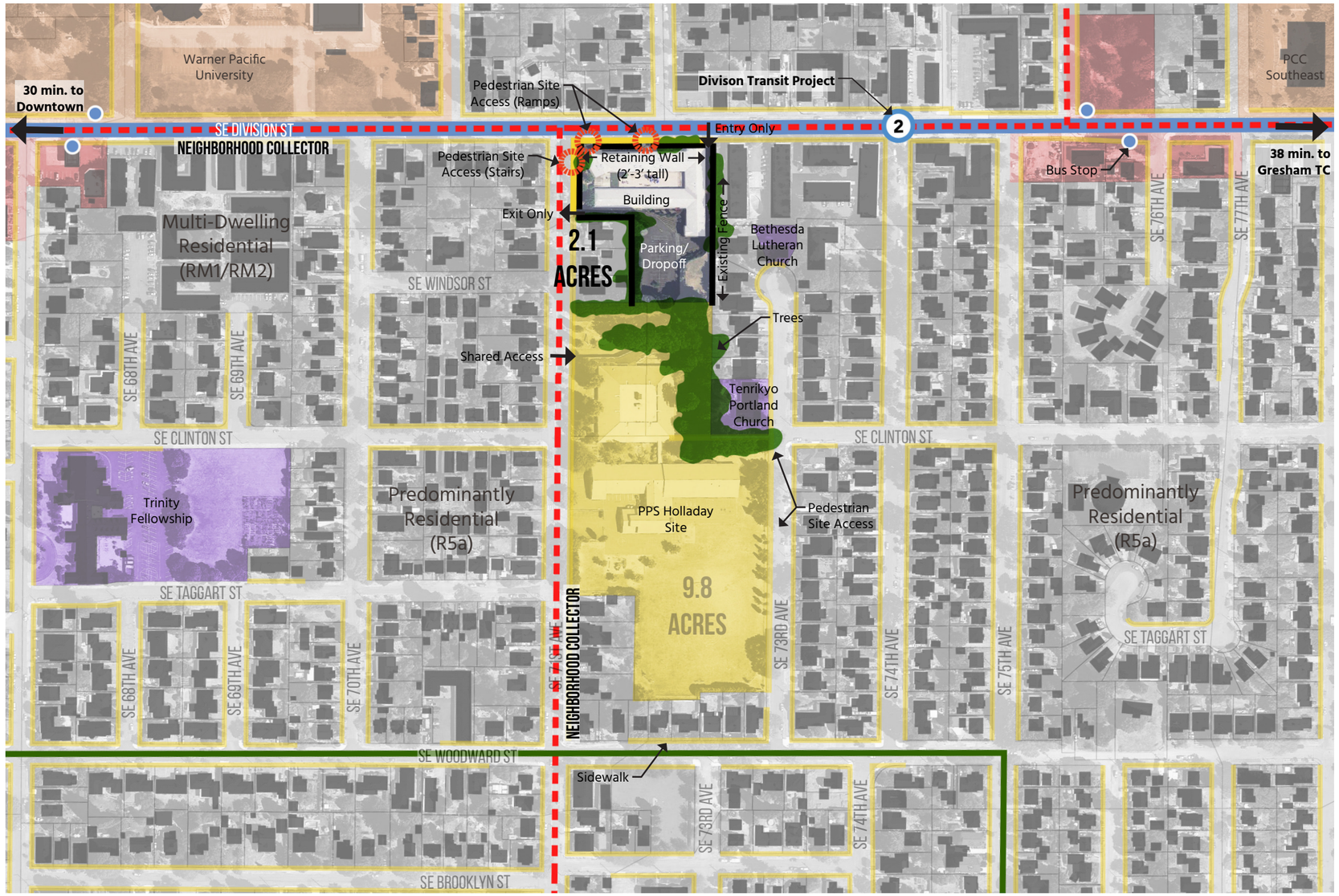
The site is located within a mosaic of different land uses, but surrounded predominantly by residential uses with a mix of housing types. SE 82nd Ave, SE Powell Blvd, and SE Division St are all nearby significant commercial/mixed use corridors. Several community uses (SE Community Food Pantry, Wild Lilac Child Development, Mt Tabor Community Garden) and places of worship are nearby.

LEGEND

- BUS LINE
- NEIGHBORHOOD GREENWAY
- MAJOR ROAD
- EXISTING MAX LINE
- PARKS
- MIXED USE/ COMMERCIAL
- PLACE OF WORSHIP
- COMMUNITY USE
- SCHOOLS

0 200' 400' 800'

HOLLADAY ANNEX SITE ANALYSIS



SITE ANALYSIS

The Holladay Annex site is a 2.3 acre portion of the larger PPS Holladay site. Located on SE Division Street, it consists of a 30,000sf single-story building built in 1961 with a central courtyard and a surface parking lot on the south side of the site. The site is raised approximately 3' above the surrounding sidewalks on the west and northwest sides. Single family structures are adjacent to the west across SE 71st Ave, while a small apartment building flanks the eastern property line. SE Division St and SE 71st St are Neighborhood Collectors and may require street upgrades with major site redevelopment.

POTENTIAL SITE SUITABILITY

The existing Youngson Pioneer School at the adjacent Holladay Campus has not identified on-site needs that the Annex site could meet. The site capacity is likely not sufficient for a large district hub for athletics, VAPA, or CTE; however, the Annex building has accommodated Kindergarten students in the past, and the site could be compatible as an Early Childhood site if retrofitted to provide adequate outdoor play space, drop-off, and parking.

LEGEND

- BUS LINE
- NEIGHBORHOOD COLLECTOR
- BUS STOP
- SIDEWALK
- FENCE
- VEHICULAR ACCESS
- PEDESTRIAN SITE ACCESS

0 50' 100' 200'

Portland Public Schools

Enrollment & Program Balancing Phase 2

Board Update

PORTLAND PUBLIC SCHOOLS

December 14, 2021

Draft Proposal Details

Proposal A

Proposal B

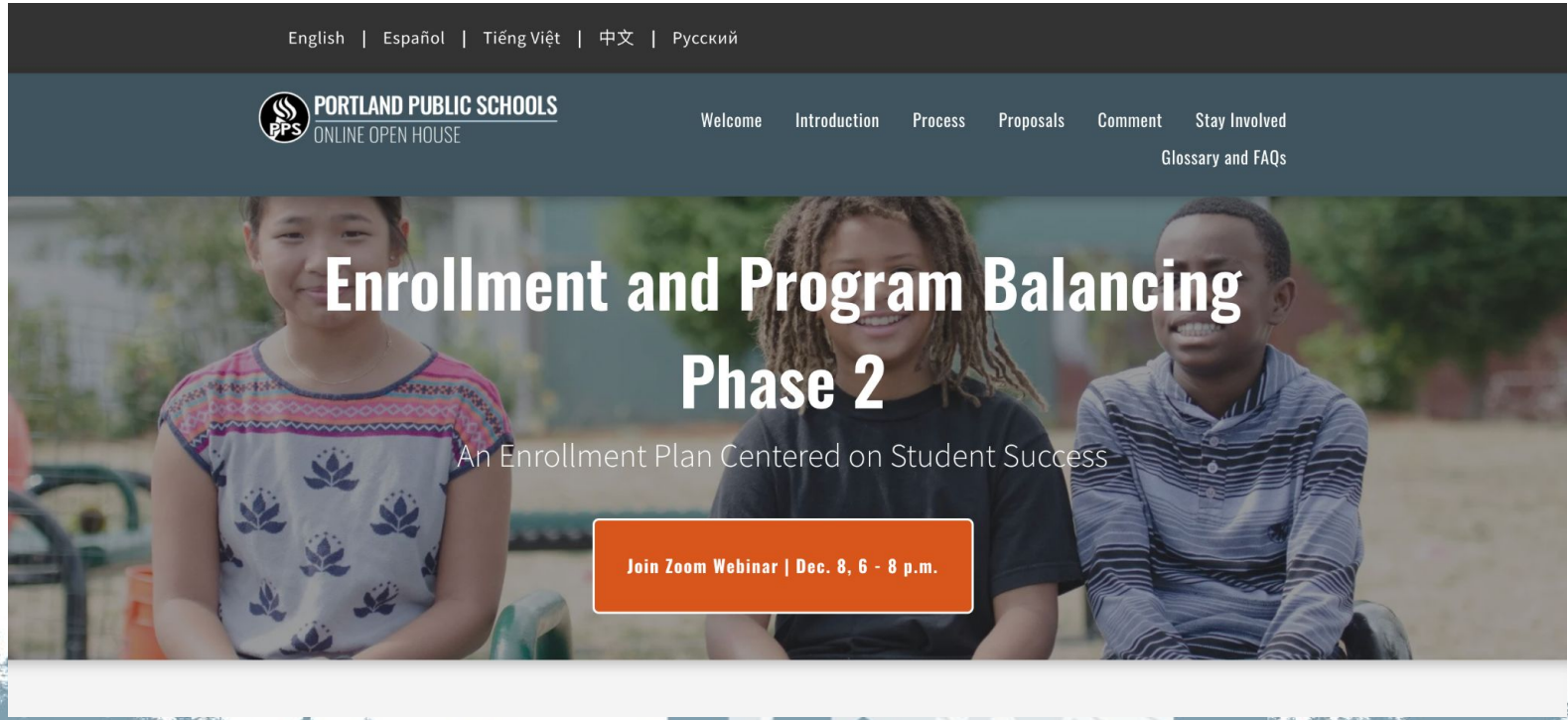
Proposal C

Open House Website - ppsenrollmentbalancing.com

Timeline Update

- SE Guiding Coalition Phase 2 will be implemented in Fall 2023 to provide the time needed to staff schools
- Since Phase 2 is an iterative process, the Guiding Coalition members will need several additional meetings to complete the process
- Dates for a Board work session and final proposal approval will be updated

Community Engagement



Co-Chairs

- Determine a timeline that allows for community engagement and good SEGC processes around boundary decisions once programmatic recommendations are finalized
- Considerations for engaging communities of color
- Need for discussion of the C2 proposal that looks at Creative Science School as separate K-5 and 6-8 programs
- Discuss plans and implementation for increasing African American and Native American teachers and administrators in PPS Schools, particularly schools impacted by this process for fall 2022
- Clarity around the interaction of this process with the upcoming high school process
- Data request for DLI outcomes with regards to whole-school DLI recommendation

Transitions

Boundary and program change implementation		Standard	Accelerated
Boundary change	Current students remain through the highest grade	6 years-ES 3 years-MS	2 years*
Special program relocation Grade reconfiguration Neighborhood program closure	All grade levels moves at once	1 year	n/a

Standard Transfer Rights	Standard	Accelerated
Transfer students may remain at a school impacted by boundary change	5 years	2 years*
New students are guaranteed a seat at the school where their transfer sibling remains enrolled	6+ years	1 year or more, depending on space availability
Transfer students may move with their current cohort if impacted by grade reconfiguration or neighborhood program closure	5 years-ES 2 years-MS	1 year or more, depending on space availability

*assumes 5th and 8th graders would be exempt from change

Question for the Board

- Implementation of the Phase 2 final proposal will begin in 2023. Should we proceed using the standard Student Assignment policy and procedures or accelerated implementation?

RESOLUTION No. 6422

Acceptance of the Annual Comprehensive Financial Report, Reports to Management and the Report on Requirements for Federal Awards

RECITALS

A. The Board of Education is committed to accountability for how Portland Public Schools spends its tax dollars and other resources, and recognizes that transparency, accuracy, and timeliness in financial reporting are important components of financial accountability.

B. The District Auditor, Talbot, Korvola & Warwick, LLP, has completed their independent audit of the financial reporting for the year ended June 30, 2021, and provides assurance that the District's accounting and reporting are in compliance with generally accepted accounting principles.

C. The District has received awards for Excellence in Financial Reporting for 41 consecutive years from both the Government Finance Officers Association (GFOA) and the Association of School Business Officials (ASBO) and plans to submit the current financial reports for similar award consideration.

RESOLUTION

The Board of Education accepts the Annual Comprehensive Financial Report, Reports to Management, and Report on Requirements for Federal Awards of School District No. 1J, Multnomah County, Oregon for the fiscal year ended June 30, 2021, and authorizes the reports to be distributed to required state and federal agencies and filed for future reference.

PORTLAND PUBLIC SCHOOLS

OFFICE OF CHIEF FINANCIAL OFFICER

501 North Dixon Street / Portland, OR 97227
Telephone: (503) 916-3115

Date: December 14, 2021

To: Board of Education

From: Nolberto Delgadillo, Chief Financial Officer
Claire Hertz, Deputy Superintendent, Business and Operations
Tracy Pinder, Senior Director, Financial Services

Subject: 2020-21 Annual Comprehensive Financial Report ("Annual Report") and Report on Requirements for Federal Awards

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BACKGROUND

The District's financial auditor, Talbot, Korvola & Warwick, LLP, has issued an unmodified opinion on our financial reports for the year ended June 30, 2021. An unmodified opinion is the technical term used to indicate a "clean audit" and is the highest level of opinion. It is the outcome that we expected. Of additional note, this is the fourth consecutive year that the District has had no audit findings or questioned costs.

RELATED POLICIES/BEST PRACTICES

Sound fiscal management provides a solid financial foundation for effective, efficient operations and informed spending decisions that ultimately benefit our historically underserved student population.

ANALYSIS OF SITUATION

The 2020-21 audit report expresses an unmodified opinion, which is indicative of a high level of fiscal accountability by PPS Finance staff. For our 2019-20 Annual Report, the Association of School Business Officials awarded PPS their Certificate of Excellence in Financial Reporting (41st consecutive year) and the Government Finance Officers Association awarded PPS their Certificate of Achievement for Excellence in Financial Reporting (41st consecutive year). PPS Finance staff will submit the 2020-21 Annual Report to ASBO and GFOA and expect that we will again receive these coveted awards.

There are six areas of particular interest. They are:

- The Independent Auditor's Report (pages 13-16 of the Annual Report).
- The Management's Discussion and Analysis, which provides an executive summary of the District's financial status (pages 17-28 of the Annual Report).
- The Independent Auditor's Report on Compliance and Internal Control over Financial Reporting Based on an Audit of Financial Statements Performed in Accordance with Oregon State Regulations (pages 130-131 of the Annual Report).

- The Independent Auditor's Report on Internal Control Over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with Government Auditing Standards (pages 1-2 of the Report on Requirements for Federal Awards).
- The Independent Auditor's Report on Compliance for Each Major Federal Program; Report on Internal Control over Compliance; and Report on the Schedule of Expenditures of Federal Awards Required by the Uniform Guidance (pages 3-5 of the Report on Requirements for Federal Awards).
- Schedule of Findings and Questioned Costs (pages 11-12 of the Report on Requirements for Federal Awards).

The Annual Report presents financial statements at the major fund level, consistent with the budget appropriation at major fund levels of 100 (General Fund), 200 (all Special Revenue Funds), 300 (all Debt Service Funds), 400 (all Capital Projects Funds) and 600 (Risk Management Fund).

General Fund Ending Fund Balance increased $24.2 million to $88.7 million, which is 13.0 percent of General Fund operating revenues. This level exceeds the percentage set with Board Policy 8.10.025-P, which establishes the goal of maintaining an Ending Fund Balance ranging from 5 to 10 percent of annual General Fund Revenues. The increase in Ending Fund Balance is attributable to several factors: 1) increases in property tax revenues; 2) spending reductions associated with Comprehensive Distance Learning and hybrid instruction models continuing longer than originally anticipated; and 3) opportunities which arose at the end of the year to take advantage of Federal COVID Relief funding that had not been originally anticipated.

Special Revenue Ending Fund Balance decreased $7.6 million to $28.2 million, due to additional spending on COVID-19 relief measures funded by FEMA, ESSER, and GEER grants. Revenues increased by $19.7 million, while expenditures increased by $25.6 million[CA1] from the previous year, primarily due to these federal grants and SIA grants funded by ODE.

Capital Projects Fund Ending Fund Balance increased $108.6 million to $771.6 million. Key revenue sources were $395.0 million from issuance of bonds, $2.1 million in investment earnings, and $3.4 million in Construction Excise Tax. Expenditures were $294.2 million, primarily related to bond projects. This is as expected as construction projects progress.

FISCAL IMPACT

There is no direct fiscal / budget impact because of this audit. A less positive outcome could potentially have indirect negative impacts on PPS' fiscal outlook, including the District's ability to secure grant funding and its ability to borrow funds at the most advantageous interest rates. Additionally, in the case of adverse audit findings/issues, the State Office of the Department of Education has the authority to withhold State School Fund payments until audit findings and/or issues are resolved by the District.

COMMUNITY ENGAGEMENT (IF APPLICABLE)

The Annual Report and Report on Requirements for Federal Awards will be published on the District's website and have been shared with the Audit Committee. Various interested parties,

primarily state agencies, financial institutions and granting agencies, are issued copies as required or requested.

TIMELINE FOR IMPLEMENTATION / EVALUATION

Once the Annual Report and Report on Requirements for Federal Awards are received by the Board, they will be published and sent to the Oregon Secretary of State's office, Oregon Department of Education, and other key stakeholders, as well as being published on the District's website. Some of these agencies require reporting no later than December 31.

BOARD OPTIONS WITH ANALYSIS

N/A

STAFF RECOMMENDATION

Staff recommends the Board of Education receive the Annual Report, Reports to Management, and Report on Requirements for Federal Awards of School District No. 1J, Multnomah County, Oregon for the fiscal year ended June 30, 2021 at the December 14, 2021 board meeting.

Finance staff will be happy to answer board members' questions; and we value any comments and suggestions for improvement.

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

_____*CH*_____ *(Initials)*

ATTACHMENTS

A. Annual Comprehensive Financial Report for the year ended June 30, 2021
B. Report on Requirements for Federal Awards for the year ended June 30, 2021

School District No. 1J, Multnomah County, Oregon

PORTLAND PUBLIC SCHOOLS

ANNUAL COMPREHENSIVE FINANCIAL REPORT

For the year ended June 30, 2021

Portland Public Schools

Annual Compehensive Financial Report

For the year ended June 30, 2021

School District No. 1J, Multnomah County, Oregon

Portland, Oregon

Prepared by the Finance Department

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON

Annual Comprehensive Financial Report

For the Year Ended June 30, 2021

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Introductory

Introductory

Bus Meal Delivery, Grant High School

Coats for Kids

Nolberto Delgadillo
Chief Financial Officer

PORTLAND PUBLIC SCHOOLS
501 N. Dixon, Portland, OR 97227
Phone: (503) 916-3115 • Fax: (503) 916-2125

December 3, 2021

To the Community of School District No. 1J, Multnomah County, Oregon, and to the Members of the Board of Education:

We are pleased to submit the Annual Comprehensive Financial Report (ACFR) of School District No.1J, Multnomah County, Oregon (Portland Public Schools or the District or PPS) for the fiscal year ended June 30, 2021, together with the audit opinions of our auditors as required by Oregon Revised Statutes. Responsibility for both the accuracy of the presented data and the completeness and fairness of the presentation, including all disclosures, rests with District management. We believe the financial statements and related information reflecting the financial position and results of the operations of the District are stated fairly in all material aspects. All disclosures necessary to enable the reader to gain understanding of the District's financial affairs have been included.

To provide a reasonable basis for making these representations, District management has established and maintains an internal control structure designed to ensure that the assets of the District are protected from loss, theft or misuse and to ensure that adequate accounting data are compiled to allow for the preparation of financial statements in conformity with accounting principles generally accepted in the United States of America (GAAP). Our internal control structure is designed to provide reasonable, but not absolute, assurance that these objectives are met. The concept of reasonable assurance recognizes that: (1) the cost of a control should not exceed the benefits likely to be derived; and (2) the valuation of costs and benefits requires estimates and judgments by management. The internal control structure is subject to periodic evaluation by management. We believe our internal control structure adequately safeguards the assets and provides reasonable assurance of proper recording of all financial transactions. As management, we assert that, to the best of our knowledge and belief, this financial report is complete and reliable in all material respects.

Financial Report Presentation

The financial statements of the District are prepared in conformity with accounting principles generally accepted in the United States of America (GAAP) as applied to governmental units. The Governmental Accounting Standards Board (GASB) is the governing body and establishes governmental accounting and financial reporting principles. The more significant of the District's accounting policies are discussed in Note 1 of these financial statements.

Designed to meet the needs of a broad spectrum of financial statement readers, this Annual Comprehensive Financial Report (ACFR) is divided into four major sections:

The ***Introductory Section*** includes the table of contents, this transmittal letter, the District's organizational chart, and copies of certificates awarded for Portland Public Schools' 2020 ACFR.

The ***Financial Section*** includes the Independent Auditor's Report, Management's Discussion and Analysis (MD&A), the basic financial statements including notes to the basic financial statements, required supplementary information (RSI), and supplementary information including major fund financial statements.

The ***Statistical Section*** includes selected financial and demographic information, generally presented on a multi-year basis. These schedules are designed to improve the understandability and usefulness of the information presented in the financial section.

The ***Audit Comments and Disclosures Section*** includes disclosures required by the Minimum Standards for Audits of Oregon Municipal Corporations.

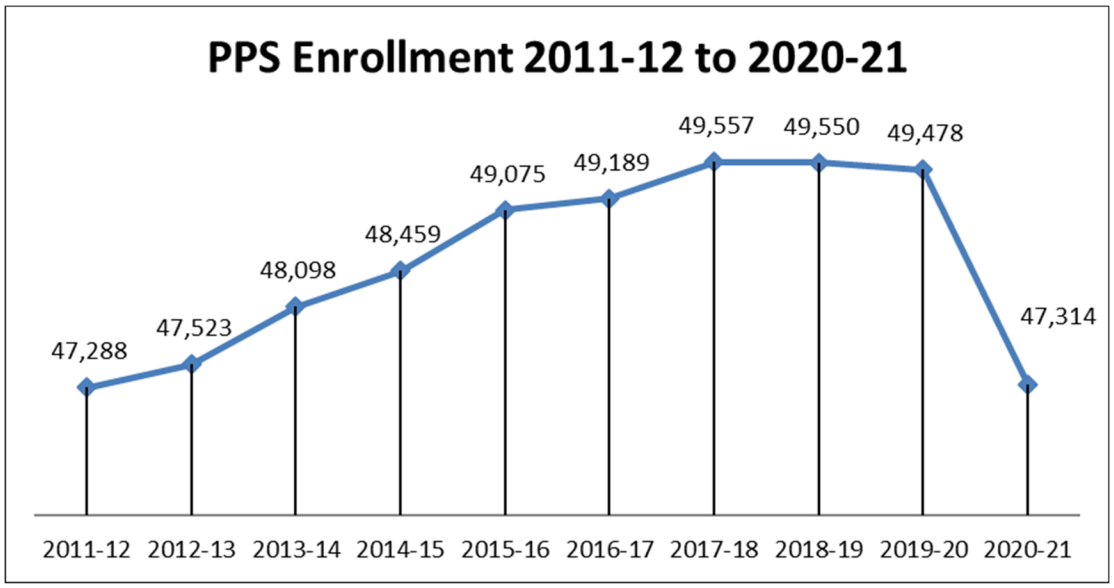
GAAP requires that management provide a narrative introduction, overview, and analysis to accompany the basic financial statements in the form of Management's Discussion and Analysis (MD&A). This letter of transmittal is designed to complement the MD&A and should be read in conjunction with it. The District's MD&A can be found immediately following the Independent Auditor's Report.

Profile of the District

Portland Public Schools, founded in 1851, is a PK-12 urban school district in Portland, Oregon. The District has no component units and is not a component unit of any other government. With more than 47,000 students in 112 schools and other programs, it is one of the largest school districts in the Pacific Northwest, and the largest and oldest school district in Oregon. With highly trained teachers and staff, an engaged parent community, strong partnerships, and a focus on closing the racial educational achievement gap, the PPS graduation rate has consistently improved since 2009-10. Thanks to the state Legislature, school funding is improving and thanks to Portland voters, a PPS School Building Improvement Bond is now fueling the modernization of our aging school buildings for 21st century learning.

The District covers an area over 152 square miles, including portions of the cities of Portland (total population 656,751), Lake Oswego (total population 39,821), and Milwaukie (total population 21,046), based on 2020 estimates by the U.S. Census Bureau Population Estimates Program (PEP). The District maintains over 100 campuses with more than 300 buildings and a total floor area of more than 9 million square feet. The median age of PPS school buildings is 78 years for elementary schools, 93 years for middle schools, and 95 years for high schools. Please see Schedule 17 of the Statistical Section for additional details of each building's size, age and enrollment.

Student enrollment as of October 2020 was 47,314. Enrollment counts are compiled annually on or about the first of October as required by the State of Oregon. An enrolled student is defined as a student who attends one or more schools or programs within the District. Regardless of the number of schools or programs attended, each student is counted only once; the counts are not duplicated.



Source: Enrollment by Program Type, Grade, and Race/Ethnicity Reports - https://www.pps.net/Page/942

October 2020 Portland Public Schools Student Enrollment (by Program Type)			
Program Type	**Number of Schools/Programs**	**Enrollment**	**Distribution**
Regular Schools and Programs			
Elementary Schools	57	23,265	49.17%
Middle Schools	13	7,416	15.67%
High Schools	9	12,667	26.77%
Subtotal - Regular Schools	79	43,348	91.62%
PPS Alternative Programs	5	1,243	2.63%
Subtotal - Schools and Alternative Programs	84	44,591	94.24%
Community-Based Programs	8	872	1.84%
Special Education Programs	14	408	0.86%
Public Charter Programs	6	1,443	3.05%
Grand Total	112	47,314	100.00%

Source: Enrollment by Program Type, Grade, and Race/Ethnicity Reports - https://www.pps.net/Page/942

Beginning in 2009, the District experienced increases in enrollment every year until 2018-19. Enrollment counts from October 2020 show that total enrollment decreased by 2,164 students from the previous year. Demographic studies conducted by Portland State University project enrollment levels decreasing to a low of 45,518 in 2029-30 and then increasing to 46,869 students over the following six years in the PSU "Middle Series Forecast" scenario. Overall enrollment impacts due to the COVID-19 pandemic are only just beginning to be seen and the long-term implications are yet to be fully understood. Additional detail regarding enrollment projections may be found at: https://www.pps.net/Page/1834.

The Board of Education

An elected seven-member board establishes and oversees the District's policies. The Board of Education is the chief governing body and is exclusively responsible for its public decisions. A list of board members can be found on page 9 of this report. The chief administrative officer of the District is the Superintendent, who is appointed by the Board. The Board of Education is accountable for all fiscal matters that significantly affect operations. Guadalupe Guerrero is the Superintendent of Portland Public Schools. Mr. Guerrero served as the chief administrative officer of the district for all of 2020-21.

Budgetary Controls

Under Oregon Revised Statutes (33.710), school districts are municipal corporations empowered to provide elementary and secondary educational services for the children residing within their boundaries. Portland Public Schools fulfills this responsibility by building, operating, and maintaining school facilities, developing and maintaining approved educational programs and courses of study (including career/technical educational programs and programs for English language learners and special-needs students), and providing for transportation and feeding of students in accordance with District, State and Federal program guidelines. This report includes all funds of the District.

The District is required by the State of Oregon to adopt an annual budget for all funds subject to the requirements of Municipal Audit Law as outlined in the 2017 Oregon Revised Statutes 297.405 to 297.555 and 297.990. The budget for each individual fund is a plan for the financial operations to be conducted during the coming fiscal year and is adopted annually, prior to July 1, by the Board of Education after certification by the Multnomah County Tax Supervising and Conservation Commission. The level of budgetary control, that is the level at which expenditure cannot legally exceed the

appropriated amount, is established by major function category: Instruction, Support Services, Enterprise & Community Services, Facilities Acquisition & Construction, Debt Service, Transfers Out, Contingency and Ending Fund Balance. After adoption, the budget may be amended through procedures specified in State statute and Board policy.

District Budget Principles

The District's governing body adopted budget principles, by way of resolution number 5229 at its March 8, 2016 meeting. These principles remain in effect today. Exhibit A to that resolution provides detail for each of the principles, but for the sake of brevity, only the principles are presented below. These principles, along with the District's Vision, System shifts and the Board adopted goals, shape the financial planning and analysis activities for the district.

- Providing Students with an Exceptional Educational Experience and Ensuring their Academic Success Should Drive the Budget Process
- Decisions Should Be Driven by Data
- Base Resourcing Decisions on Cost-Effectiveness
- Prioritize the Core Program in All Schools
- Critically Re-Examine Patterns of Spending
- Provide Every Student with Equitable Access
- Take a Long-Term Perspective
- Be Transparent

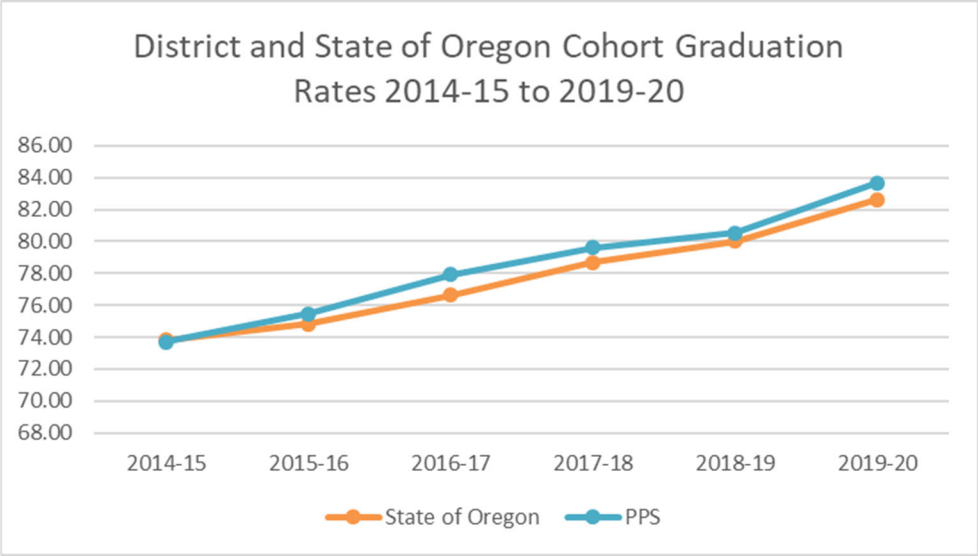
Service Efforts and Accomplishments

On June 25, 2019, the Board of Education passed Resolution 5909, Portland Public Schools reImagined: Preparing Our Students to Lead Change and Improve the World as the District's Vision. This Vision focuses on what we want to be true for our graduates and includes four main areas: a Graduate Portrait, Educator Essentials, System Shifts and Core Values.

On October 15, 2019, the Board adopted by Resolution 5984, Portland Public Schools Board Goals for 2019-22. These include the following academic goals for our students that align with the community and District vision of the Graduate Portrait:

- Third Grade Reading
- Fifth Grade Mathematics
- Eighth Grade Graduate Portrait
- Post-Secondary Readiness/Ready for College & Career

The Vision, accountability metrics and the theory of action will continue to shape and define the financial planning and decision making as well as serve as the District's roadmap.



Source: ODE Cohort Graduation Rates - https://www.oregon.gov/ode/reports-and-data/students/Pages/Cohort-Graduation-Rate.aspx

The PPS four-year graduation rate has improved from 73.7 percent for the Class of 2015 to 83.7 percent for the Class of 2020 (most recent year available from Oregon Department of Education). This rate exceeds the average graduation rate for the State of Oregon.

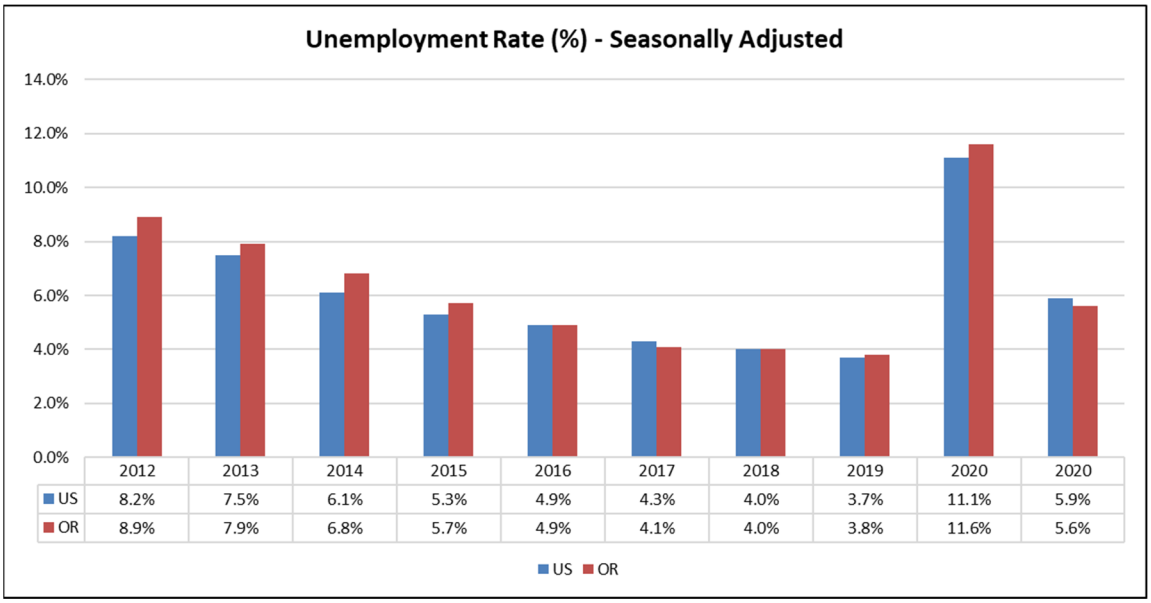
Factors Affecting Financial Condition

The information presented in the financial statements is perhaps best understood when it is considered in the broader perspective of the specific environment within which the District operates.

PPS derives about 80 percent of its General Fund revenues from the State School Fund and the associated funding distribution formula. Roughly half of the State School Fund money comes via the appropriation made by the state legislature, while the other half is the aggregate of the local permanent rate property taxes from school districts across the state. The state budget and the legislative appropriation are highly dependent upon state revenues through income taxes. The outlook for the state economy is a leading indicator for the health of this revenue stream and is, therefore, of great importance for PPS.

The second largest revenue item for PPS - roughly 15 percent of General Fund revenues - is its local option levy which is a property tax based upon assessed values of property in the PPS taxing district, and which is also significantly influenced by real market values of homes within the PPS taxing district.

Oregon State Economy – In June of 2021, Oregon's unemployment rate fell to 5.6 percent from April 2020's high of 13.2 percent. It is the lowest unemployment rate since the COVID-19 pandemic began.



Source: Bureau of Labor Statistics, Unemployment Data

Approximately 81 thousand jobs were gained over the past year, contributing to a total workforce increase of 4.5 percent from June 2020 to June 2021. The Leisure & Hospitality sector experienced the greatest percentage gains, with 17 thousand jobs gained, representing 11.5 percent of the total year-over-year job increases.

Oregon Employment by Industry (number of jobs, in thousands)				
Industry	**June 2020**	**June 2021**	**Year-over-Year Change (#)**	**Year-over-Year Change (%)**
Government	276.5	279.4	2.9	1.0%
Other Services	60.3	60.9	0.6	1.0%
Leisure & Hospitality	146.9	163.8	16.9	11.5%
Education & Health Services	286.2	299.0	12.8	4.5%
Professional & Business Services	237.1	253.1	16.0	6.7%
Financial Activities	98.5	104.8	6.3	6.4%
Information	32.2	33.3	1.1	3.4%
Trade, Transportation, and Utilities	342.0	362.4	20.4	6.0%
Manufacturing	181.8	183.2	1.4	0.8%
Construction	105.4	107.9	2.5	2.4%
Mining and Logging	6.0	6.4	0.4	6.7%
Total Nonfarm	1,772.9	1,854.2	81.3	4.59%

Source: Oregon Economy at a Glance - https://www.bls.gov/regions/west/oregon.htm#eag

Local Economy – Portland and the surrounding metropolitan area have a widely diversified economy. Its centralized location and excellent transportation facilities have established the area as a major distribution point on the West Coast for wholesale trade and high-tech exports. During 2020-21, Education, Health Services, and Hospitality accounted for 25.0 percent of the city's economy while the Trades, Transportation and Utilities made up another 19.5 percent.

Long Term Financial Planning and Major Initiatives - For many years, the District did not have adequate funds for capital improvements. In 2012, PPS updated its long-range facilities plan with the assistance of an advisory committee of more than 30 community members that brought a variety of professional perspectives as well as that of teachers, parents, and other interested participants. This committee held a series of community meetings, reaffirmed the need for a capital bond, and laid the foundation for the Board's deliberation on a bond proposal and the criteria for definition of projects to be financed.

In November of 2012, the voters of the district authorized Portland Public Schools to issue up to $482 million of general obligation bonds to improve school buildings, with 67 percent of voters supporting this capital investment program. This was a landmark accomplishment for PPS after many years of work and we are enormously grateful to the voters in this district for their continued support of PPS and for public education in our district.

The major projects at Roosevelt, Franklin and Faubion schools were completed in the fall of 2017. Grant High School was completed in time for the start of the 2019-20 school year.

A second $790 million capital bond was passed by voters in May 2017. This bond funds renovations and additions at Benson and Leodis V. McDaniel (formerly known as Madison) High Schools, and full rebuilds of Lincoln High School and Kellogg Middle School. Approximately 30 percent of the budgets for these projects comprehensively address health and safety issues.

Leodis V. McDaniel and Kellogg both opened for the school year starting in 2021. Construction is progressing at Lincoln and is scheduled to be complete in 2023. Modernization work at Benson will began in the summer of 2021. Design and work continue with health and safety projects that improve accessibility, upgrade fire alarms and fire sprinklers, reduce hazardous materials, repair or replace deteriorating school roofs, upgrade school safety and security and strengthen schools against earthquakes.

A third $1.2 Billion capital bond was passed by voters in November 2020. This bond funds additional health and safety projects across the district, replaces curriculum materials and technology equipment districtwide, modernizes Jefferson High School, completes Benson Polytechnic High School, plans additional neighborhood school projects and continues design and planning to modernize Cleveland and Ida B. Wells-Barnett (formerly known as Wilson) High Schools. PPS remains committed to deliver robust high school and middle school projects as envisioned by the voters, steward bond resources prudently and efficiently, and build and maintain the trust of voters in our community.

Charter Schools

Oregon statute provides state funding for charter schools that flow through the District for schools that local school boards of education have granted a charter. The District had six charter schools in operation during the 2020-21 fiscal year consistent with the previous year. Because of their size relative to the District, the charter schools do not fall under the component unit reporting requirements set forth by GASB Statement No. 39.

Independent Audits

The provisions of Oregon Revised Statutes require an independent audit of the financial records and fiscal affairs of the District. The auditors selected by the Board of Education, Talbot, Korvola & Warwick, LLP, have completed their audit of the basic financial statements and, accordingly, have included their unmodified Independent Auditor's Report in the financial section of this report.

Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards (Uniform Guidance) require state and local governments that expend $750,000 or more in federal assistance in a year have a special form of audit conducted for that year. Since 1989, Portland Public Schools has issued a separate report on these requirements. Talbot, Korvola & Warwick, LLP have also provided various required reports. Contained in the separately issued Report on

Audit Requirements for Federal Awards is the Schedule of Expenditures of Federal Awards, and the required reports on internal controls and compliance with laws and regulations.

Awards and Acknowledgments

The Government Finance Officers Association of the United States and Canada (GFOA) awarded a Certificate of Achievement for Excellence in Financial Reporting to the District for its Annual Comprehensive Financial Report for the fiscal year ended June 30, 2020. This was the 41st consecutive year that the District has achieved this prestigious award. In order to be awarded a Certificate of Achievement, a governmental entity must publish an easily readable and efficiently organized ACFR that satisfies both GAAP and applicable legal requirements. A Certificate of Achievement is valid for a period of one year only. We believe our current report continues to conform to Certificate of Achievement Program requirements, and we are submitting it to GFOA to determine its eligibility for this coveted Certificate.

The Association of School Business Officials International (ASBO) awarded its Certificate of Excellence in Financial Reporting to the District for its Annual Comprehensive Financial Report for the fiscal year ended June 30, 2020. This was the 41st consecutive year that the District earned this significant award. Receiving the Award is recognition that the District has met the highest standards of excellence in school financial reporting as adopted by ASBO. The District believes that this 2021 ACFR, which will be submitted to ASBO for review, will also conform to these standards.

We wish to express our appreciation to the staff of the Finance Department and members of other District departments who assisted in the preparation of this Annual Comprehensive Financial Report. We further extend our appreciation to the members of the Board of Education, employees of the District, and all of the Portland community whose continued cooperation, support, and assistance have contributed greatly to the achievements of Portland Public Schools.

Respectfully submitted,

Nolberto Delgadillo

Nolberto Delgadillo, CFO

SCHOOL DISTRICT NO. 1J, MULTNOMAH COUNTY, OREGON
Principal Officials
At June 30, 2021

SCHOOL BOARD

Member	Zone	Term Expiration	Phone
Andrew Scott	1	June 30, 2023	503-916-3741
Michelle DePass	2	June 30, 2023	503-916-3741
Amy Kohnstamm	3	June 30, 2023	503-916-3741
Rita Moore	4	June 30, 2021	503-916-3741
Scott Bailey	5	June 30, 2021	503-916-3741
Julia Brim-Edwards	6	June 30, 2021	503-916-3741
Eilidh Lowery	7	June 30, 2023	503-916-3741

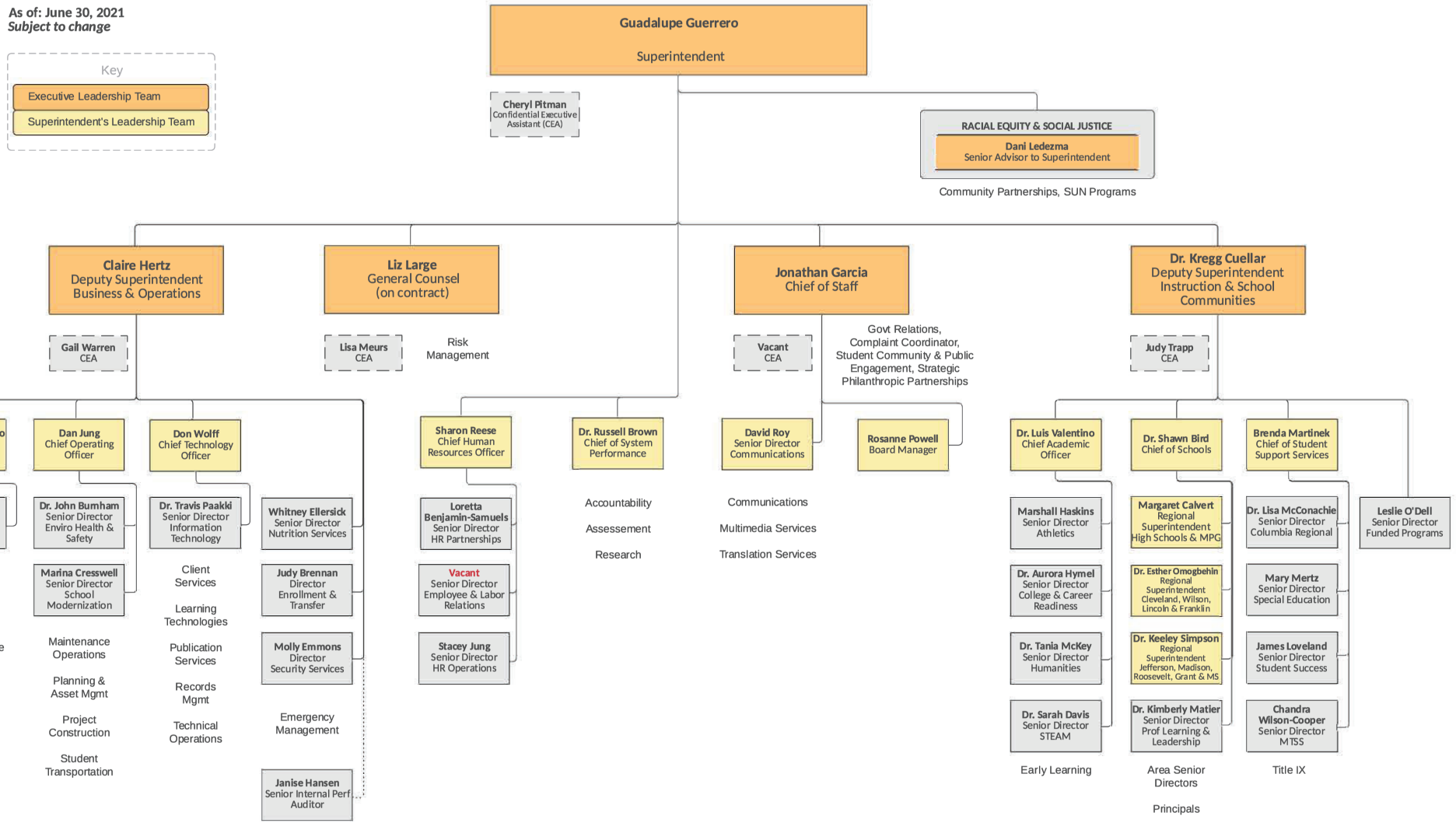
ADMINISTRATIVE STAFF

Guadalupe Guerrero	Superintendent
Dr. Kregg Cuellar	Deputy Superintendent, Instruction and School Communities
Claire Hertz	Deputy Superintendent, Business and Operations
Liz Large	Contracted General Counsel
Jonathan Garcia	Chief of Staff
Brenda Martinek	Chief of Student Support Services
Dan Jung	Chief Operating Officer
David Roy	Senior Director Communications
Don Wolff	Chief Technology Officer
Dr. Luis Valentino	Chief Academic Officer
Nolberto Delgadillo	Chief Financial Officer
Rosanne Powell	Board Manager
Sharon Reese	Chief Human Resources Officer
Dr. Shawn Bird	Chief of Schools
Dr. Russell Brown	Chief of System Performance

PORTLAND PUBLIC SCHOOLS

2020-21 PPS Leadership

As of: June 30, 2021
Subject to change



ASSOCIATION OF SCHOOL BUSINESS OFFICIALS INTERNATIONAL

The Certificate of Excellence in Financial Reporting is presented to

School District 1J, Multnomah County, Oregon

for its Comprehensive Annual Financial Report for the Fiscal Year Ended June 30, 2020.

The district report meets the criteria established for ASBO International's Certificate of Excellence.

CERTIFICATE OF EXCELLENCE IN FINANCIAL REPORTING

W. Edward Chabal
President

David J. Lewis
Executive Director

Government Finance Officers Association

Certificate of Achievement for Excellence in Financial Reporting

Presented to

School District No. 1J, Multnomah County Oregon

For its Annual Comprehensive
Financial Report
For the Fiscal Year Ended

June 30, 2020

Christopher P. Morrill

Executive Director/CEO

Financial

Financial

Harriet Tubman, School Supply Pickup

Kellogg Middle School

TKW

Talbot, Korvola & Warwick, LLP 14945 SW Sequoia Parkway, Suite 150, Portland, OR 97224
P 503.274.2849 F 503.274.2853 www.tkw.com

INDEPENDENT AUDITOR'S REPORT

Board of Education
School District 1J, Multnomah County, Oregon
Portland, Oregon

REPORT ON THE FINANCIAL STATEMENTS

We have audited the accompanying financial statements of the governmental activities, each major fund, and the aggregate remaining fund information of School District No. 1J, Multnomah County, Oregon (the District), as of and for the year ended June 30, 2021, and the related notes to the financial statements, which collectively comprise the District's basic financial statements as listed in the Table of Contents.

MANAGEMENT'S RESPONSIBILITY FOR THE FINANCIAL STATEMENTS

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

AUDITOR'S RESPONSIBILITY

Our responsibility is to express opinions on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the District's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the District's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

An independently owned member
RSM US Alliance

RSM

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INDEPENDENT AUDITOR'S REPORT (Continued)

OPINIONS

In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities, each major fund, and the aggregate remaining fund information of the District, as of June 30, 2021, and the respective changes in financial position and, where applicable, cash flows thereof for the year then ended in accordance with accounting principles generally accepted in the United States of America.

OTHER MATTERS

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that the Required Supplementary Information, such as Management's Discussion and Analysis, Schedule of Changes in the District's Total OPEB Liability and Related Ratios-RHIS, Schedule of the District's Proportionate Share of Net OPEB Liability (Asset) and District Contributions-RHIA, Schedule of the District's Proportionate Share of Net Pension Liability (Asset) and District Contributions, Schedule of Changes in the District's Total Pension Liability and Related Ratios-Stipend, and Notes to the Required Supplementary Information, as listed in the Table of Contents, be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

Accounting principles generally accepted in the United States of America require that the budgetary comparison information for the General Fund and Special Revenue Fund listed in the Table of Contents as Required Supplementary Information, be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board, who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic or historical context. The budgetary comparison information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. Such information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the budgetary comparison information is fairly stated in all material respects in relation to the basic financial statements as a whole.

INDEPENDENT AUDITOR'S REPORT (Continued)

Other Information

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise the District's basic financial statements. The other schedules and combining statements, listed in the Table of Contents as Supplementary Information, are presented for purposes of additional analysis and are not a required part of the basic financial statements. The Supplementary Information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. Such information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the Supplementary Information is fairly stated, in all material respects, in relation to the basic financial statements as a whole.

The accompanying Introductory and Statistical sections, as listed in the Table of Contents, have not been subjected to the auditing procedures applied in the audit of the basic financial statements, and accordingly, we do not express an opinion or provide any assurance on them.

REPORTS ON OTHER LEGAL AND REGULATORY REQUIREMENTS

***Other Reporting Required by* Government Auditing Standards**

In accordance with *Government Auditing Standards*, we have also issued our report dated December 3, 2021, on our consideration of the District's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the District's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the District's internal control over financial reporting and compliance.

Other Reporting Required by Oregon Minimum Standards

In accordance with *Minimum Standards for Audits of Oregon Municipal Corporations*, we have also issued our report dated December 3, 2021, on our consideration of the District's compliance with certain provisions of laws and regulations, including the provisions of Oregon Revised Statutes as specified in Oregon Administrative Rules. The purpose of that report is to describe the scope of our testing of compliance and the results of that testing and not to provide an opinion on compliance.

By Timothy R Gillette
Timothy R. Gillette, Partner

Portland, Oregon
December 3, 2021

PPS

SCHOOL DISTRICT NO. 1J, MULTNOMAH COUNTY, OREGON
Management's Discussion and Analysis

As management of School District No.1J, Multnomah County, Oregon (Portland Public Schools or the District or PPS), we offer readers this narrative overview and analysis of the financial activities of Portland Public Schools for the fiscal year ended June 30, 2021. We encourage readers to consider the information presented here in conjunction with additional information that we have furnished in our letter of transmittal, which can be found on pages 1-8 of this report.

FINANCIAL AND BUDGETARY HIGHLIGHTS

Budget

On June 11, 2020 the Board of Education (the Board) adopted the fiscal year 2020-21 budget by way of Board Resolution No. 6135. At the time of budget adoption, the Governor announced a special legislative session to adjust the State of Oregon budget including allocations to K-12 education. With an unknown timeframe for the session and an uncertain economic outlook due to the pandemic, the District brought forward an Adopted budget built on the estimated funding levels for the 2019-21 biennial budget issued by the Oregon Department of Education on February 26, 2020, that included a State School Fund allocation of $9.0 billion, full funding for the Student Investment Account (SIA), and full funding for Measure 98 High School Success (M98).

With the uncertain outcomes at the time of budget adoption, the District conservatively adjusted staffing levels and operational budget allocations to schools and departments. The District continued to focus available resources on the PPS Strategic Plan and Vision: PPS Reimagined, which included targeted investments in Professional Development (PD), Student Success, and Safety and Modernization. These were reflected in expanded learning opportunities in Racial Equity and Social Justice (RESJ) aligned to the PD framework, targeted investments in recruitment and retention of our staff, enhanced arts and Career and Technical Education (CTE) pathway opportunities, additional teachers and instructional specialists, increases in counselors, social workers, and psychologists, as well as wrap-around supports for our students and families.

On September 22, 2020, the Board voted to amend the 2020-21 budget, by way of Board Resolution No. 6178. This first amendment to the budget updated and aligned resources and requirements with the changes brought forward from the State of Oregon August 10, 2020 special session, the largest being the reduction to the SIA allocations for the year.

- **General Fund:** $17.8 million was allocated across Instruction and Support Services. The changes included shifting expenditures originally supported by the SIA over to the General Fund as well as investments in Comprehensive Distance Learning (CDL) and Hybrid education models and other COVID-related supports (personal protective equipment (PPE), technology, cleaning supplies, software, and facility changes.)
- **Special Revenue Fund:** $8.0 million was reduced across Instruction and Support Services appropriations to reflect the reduced SIA allocation of $27.8 million offset by the new pandemic funding of $18.7 million that included additional appropriations for Emergency Relief Funds (ESSER), Federal Emergency Management Agency (FEMA), and CDL.

On June 15, 2021, the Board voted to amend the 2020-21 budget a second time, by way of Board Resolution No. 6324.

- **General Fund:** Included appropriation adjustments across Support Services and Enterprise and Community Services. These adjustments aligned appropriation to the spending plan for the General Fund Student Investment Account investments within our RESJ department.
- **Special Revenue Fund**: $12.2 million was allocated across appropriation to recognize new resources and spending for Summer School Learning Grants (SSL) as well as adjust spending plans related to ESSER I, SIA, and FEMA.
- **Other:** Appropriation adjustments in Debt Service and Capital Projects Funds to reflect updated spending and guidance.

Other Highlights

In November 2012, District voters passed an eight-year, $482.0 million capital bond measure. With that bond measure, Portland Public Schools began a 30-year effort to modernize every school in the District. The 2012 authorization included modernizations for Franklin, Roosevelt, and Grant High schools and Faubion PK-8 as well as seismic upgrades, roof replacements and accessibility improvements.

At June 30, 2021, the 2012 authorization had a remaining balance of $6.8 million, comprised of proceeds and related investment earnings.

Summary of Bond Resources as of June 30, 2021
(in thousands)

Authorization		Issued		
Year	Amount	Par	Premium	Unspent Balance
2012	$ 482,000	$ 482,000	$ 56,937	$ 6,842
2017	790,000	790,000	69,408	371,304
2020	1,208,000	365,465	29,574	370,364
	$ 2,480,000	$ 1,637,465	$ 155,919	$ 748,510

In May 2017, District voters passed an eight-year, $790.0 million capital bond measure. The 2017 authorization includes the modernization of Leodis V. McDaniel (formerly known as Madison) and Benson High schools, the replacement of Lincoln High school and Kellogg Middle school. The measure also included funding to address District-wide health and safety projects.

The health and safety projects include work to:

- Reduce or eliminate exposure to hazardous materials;
- Upgrade fire alarm and fire sprinkler systems;
- Improve accessibility for people with disabilities;
- Repair or replace leaking or deteriorating school roofs;
- Upgrade school safety and security; and
- Strengthen schools against earthquakes.

McDaniel and Kellogg opened for the school year starting in 2021. Construction is progressing at Lincoln and is scheduled to be complete in 2023. Modernization work at Benson began in the summer of 2021.

Construction and/or design started or progressed regarding:

- Roof replacement and seismic upgrades at ten schools;
- Fire alarm and sprinkler upgrades at nineteen schools;
- Improved disability access at ten schools;
- Hazardous materials reduction or elimination at 92 schools;
- School safety and security upgrades at 87 schools;
- Water quality improvement at 65 schools;
- Replacement of Kellogg school;
- Replacement of Lincoln High school;
- McDaniel High school modernization; and
- Benson High school modernization.

At June 30, 2021, the 2017 authorization had a remaining balance of $371.3 million for design and construction of the projects covered by the measure.

In November 2020, District voters passed a $1.208 billion capital bond measure. The measure included authorization to renovate Jefferson and Benson High schools and add a facility for alternative school programs. Additionally, the measure authorized updates to curriculum materials and technology improvements, master planning for Cleveland and Ida B. Wells-Barnett (formerly known as Wilson) High schools and for planning/adding additional capacity. The measure also provided for the development of a culturally responsive community plan and to make targeted investments in neighborhood school facilities in North and Northeast Portland.

Continuing health and safety projects include:

- Removal of barriers to accessibility in schools across the District;
- Repair/replacement of leaking or deteriorating school roofs:
- Seismic retrofit at up to three schools;
- Repair/replacement of high priority mechanical systems (heating, cooling and ventilation);
- Strengthening security measures in schools.

In December 2020, the District issued $365.4 million of the $1.208 billion authorized. A premium of $29.6 million was realized on the sale. At June 30, 2021, $370.4 million of the $395.0 million remained unspent.

OVERVIEW OF THE FINANCIAL STATEMENTS

This management's discussion and analysis is intended to serve as an introduction to Portland Public Schools' basic financial statements. The basic financial statements are comprised of three components: (1) government- wide financial statements; (2) fund financial statements; and (3) notes to the basic financial statements. In addition to the basic financial statements, this report also contains required and other supplementary information.

Government-Wide Financial Statements are designed to provide readers with a broad overview of the District's finances in a manner similar to a private-sector business. The government-wide financial statements can be found on pages 31-33 of this report.

Fund Financial Statements are designed to demonstrate compliance with finance-related legal requirements. A fund is a grouping of related accounts that is used to maintain control over resources that have been segregated for specific activities and objectives. Portland Public Schools' funds can be divided into two categories: governmental funds and proprietary funds. Reports by fund are shown in the Financial Section of the report beginning on page 35.

Governmental Funds are used to account for essentially the same functions reported as governmental activities in the government-wide financial statements. However, unlike the government-wide financial statements, governmental fund financial statements focus more narrowly on near-term inflows and outflows of available resources, as well as on balances of available resources at the end of the fiscal year.

Because the focus of governmental funds is narrower than that of the government-wide financial statements, it is useful to compare the information presented for governmental funds with similar information presented for governmental activities in the government-wide financial statements. By doing so, readers may better understand the long-term impact of the District's near-term financial decisions. The Governmental Fund Balance Sheet and the Governmental Fund Statement of Revenues, Expenditures, and Changes in Fund Balances provide a reconciliation to facilitate this comparison between governmental funds and governmental activities.

Portland Public Schools designates four major governmental funds. Information is presented separately for the General Fund, Special Revenue Fund, Debt Service Fund, and the Capital Projects Fund in the Governmental Fund Balance Sheet and the Governmental Fund Statement of Revenues, Expenditures, and Changes in Fund Balances.

Portland Public Schools adopts an annual appropriated budget for each of its funds. A budgetary comparison statement has been provided for each fund individually in either required or supplementary information to demonstrate compliance with the fund level budgets. The basic governmental fund financial statements can be found on pages 35-41 of this report.

Proprietary funds are used to account for a government's business-type activities. The District maintains only one type of proprietary fund, which is an internal service fund. Internal service funds are accounting devices used to accumulate and allocate costs among various internal functions. The District uses an internal service fund to account for its self-insurance activities related to workers compensation. Because Portland Public Schools has no business-type functions, this service benefits governmental functions and has been included within the governmental activities in the government-wide financial statements.

Internal service funds provide the same type of information as the government-wide financial statements. The internal service fund financial statements provide separate information for the self-insurance fund. The basic internal service fund financial statements can be found on pages 43-45 of this report.

Notes to the Basic Financial Statements provide additional information that is essential to a full understanding of the data provided in the government-wide and fund financial statements. These notes can be found on pages 47-87 of this report.

Required Supplementary Information (RSI) is located directly after the notes to the basic financial statements on pages 89-96 and represents the required comparison of the budget and actual results on the District's budgetary basis for the General Fund and Special Revenue Fund. In addition, the RSI discloses the District's proportionate share of liabilities/assets and related employer contributions for pension and other post-employment healthcare benefits obligations.

Supplementary Information (SI) presented on pages 98-100 includes budgetary comparison schedules for the Debt Service Fund, Capital Projects Fund and the Proprietary Fund.

GOVERNMENT-WIDE FINANCIAL ANALYSIS

Analysis of Deferred Outflows and Inflows of Resources

Deferred outflows and deferred inflows are comprised of pension and other post-employment healthcare related balances. The changes in total deferred outflows and deferred inflows were due to differences between actual and expected earnings, changes in assumptions used by outside actuaries, and other factors impacting these balances.

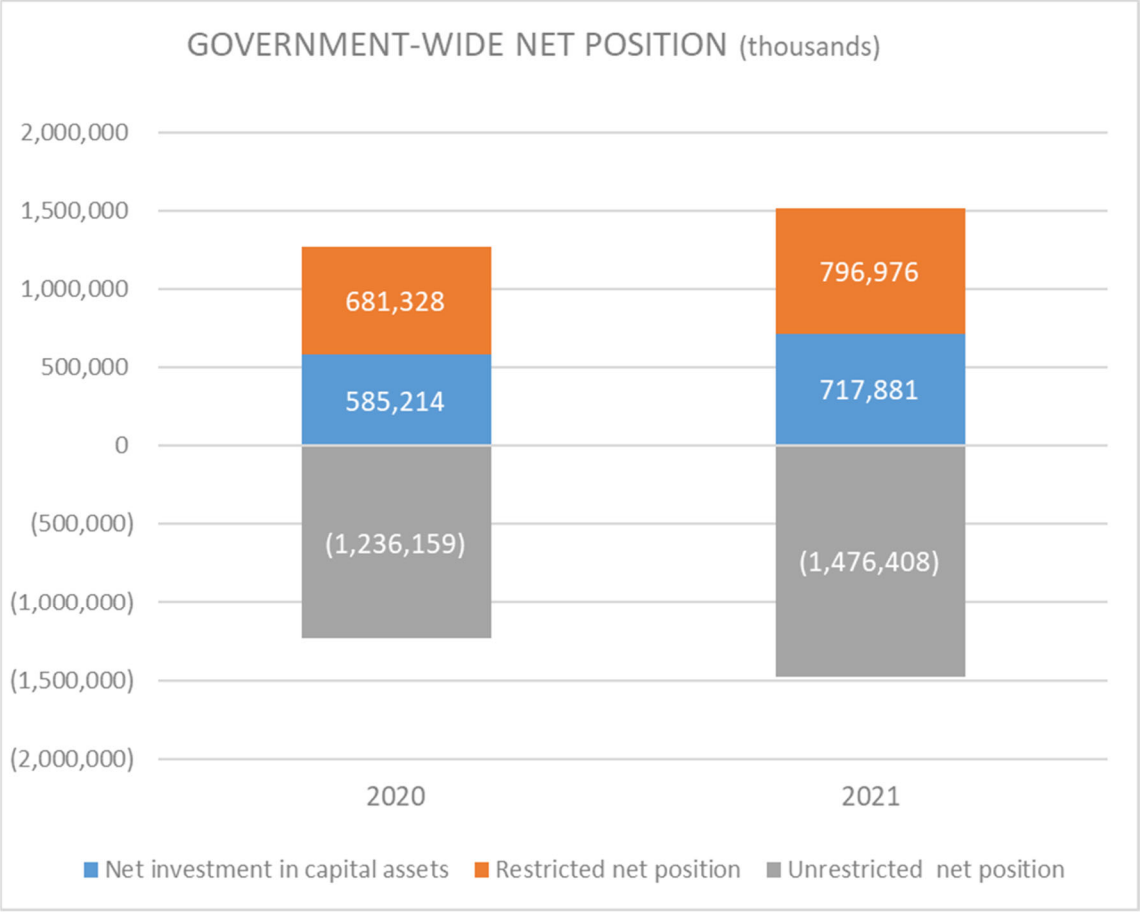
Analysis of Net Position

The Statement of Net Position presents information on the District's assets, liabilities and deferred outflows and inflows. The difference between assets/deferred outflows and liabilities/deferred inflows is reported as net position. Over time, net position may serve as a useful indicator of the District's financial position. Other indicators that can be useful in reviewing the District's financial health include enrollment trends, debt capacity and the condition of facilities.

Net Position: 2020 compared to 2021

Net Position is a primary indicator of financial position. The District's assets and deferred outflows exceeded liabilities and deferred inflows by $38.4 million at June 30, 2021. This represents an increase of $8.1 million in net position from the prior year and is further discussed below.

Net Position	Government-wide (thousands)			
	2020	2021	$ Change	% change
Assets				
Current or other assets	$ 947,919	$ 1,097,269	$ 149,350	15.8%
Net capital assets	917,372	1,173,371	255,999	27.9%
Total Assets	1,865,291	2,270,640	405,349	21.7%
Deferred Outflows of Resources	158,473	249,580	91,107	57.5%
Liabilities				
Long-term liabilities outstanding	1,583,895	2,052,014	468,119	29.6%
Other liabilities	298,341	328,566	30,225	10.1%
Total Liabilities	1,882,236	2,380,580	498,344	26.5%
Deferred Inflows of Resources	111,145	101,191	(9,954)	-9.0%
Net Position				
Net investment in capital assets	585,214	717,881	132,667	22.7%
Restricted	681,328	796,976	115,648	17.0%
Unrestricted	(1,236,159)	(1,476,408)	(240,249)	-19.4%
Total Net Position	$ 30,383	$ 38,449	$ 8,066	26.5%



Net Investment in Capital Assets has increased to $717.9 million, a $132.7 million increase over prior year. The increase is primarily driven by increases in capital assets related to the capital bond work.

Restricted Net Position represents the unspent portions of capital project funds, debt service funds, and net assets restricted by grants, donations, and post-employment benefits. Restricted Net Position increased by $115.6 million to $797.0 million this year, primarily due to the increase in bond principal as resources are set aside for bond-related construction.

Unrestricted Net Position consists of all other amounts not included in categories noted above. Unrestricted Net Position at June 30, 2021 is a negative $1.48 billion, a decrease of $240.3 million over prior year.

Analysis of Activities

The Statement of Activities presents expenses and related revenues by program, summarizing how the District's net position changed during the most recent fiscal year. The statement reports revenues earned and expenses incurred under the accrual basis of accounting, where changes in net position are reported as soon as the underlying event giving rise to the change occurs, regardless of the timing of related cash flows. Thus, revenues and expenses are reported in this statement for some items that will result in cash flows in future fiscal periods (e.g., uncollected taxes, pension amounts, other post-employment benefits (OPEB), incurred but not reported (IBNR) claims, and earned but unused vacation leave).

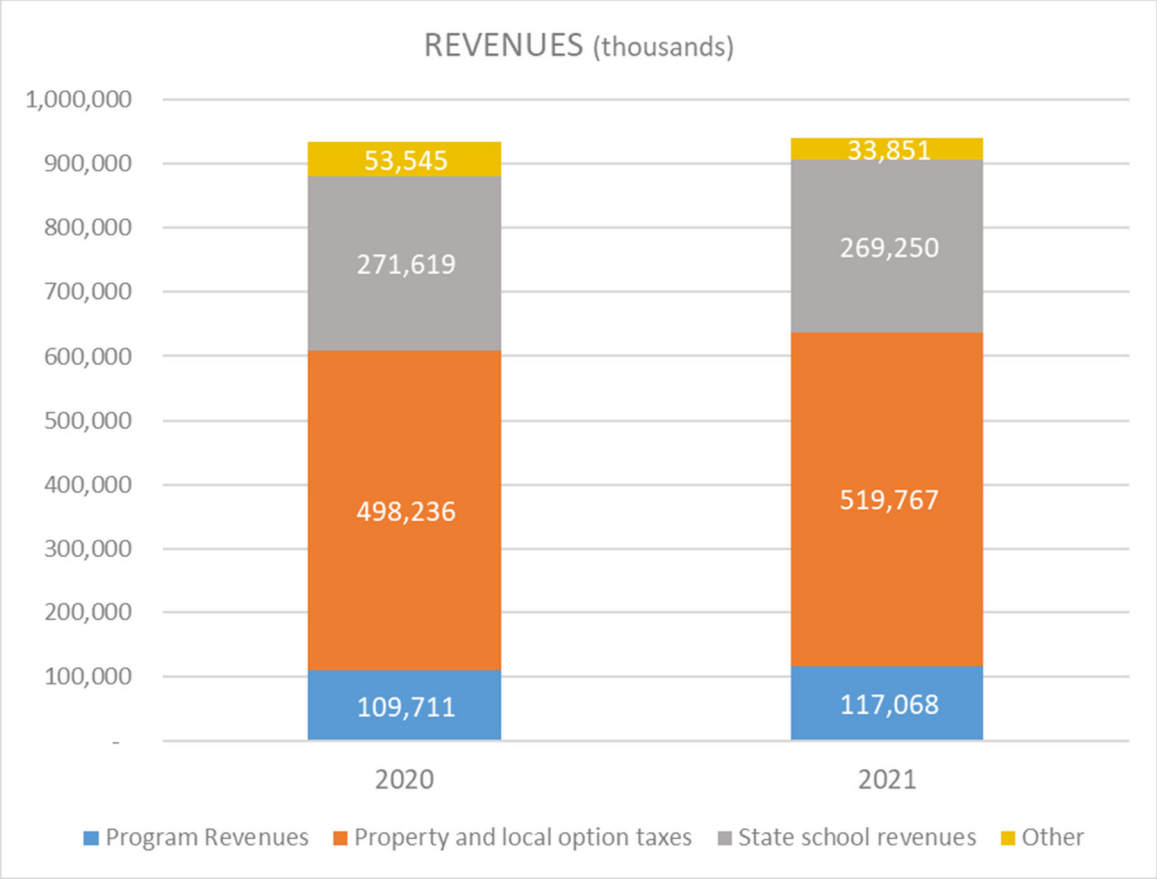
Statement of Activities	**Government-wide (thousands)**				
	2020	2021	2021- % of Total	$ Change	% Change
Revenues					
Program Revenues					
Charges for services	$ 8,271	$ 1,914	0.2%	$ (6,357)	-76.9%
Operating grants & contributions	90,072	113,835	12.2%	23,763	26.4%
Capital grants & contributions	11,368	1,319	0.1%	(10,049)	100.0%
Total Program Revenues	109,711	117,068	12.5%	7,357	6.7%
General Revenues					
Property taxes	400,203	418,228	44.4%	18,025	4.5%
Local option taxes	98,033	101,539	10.8%	3,506	3.6%
County & intermediate sources	19,072	17,185	1.8%	(1,887)	-9.9%
Construction excise tax	4,291	3,446	0.4%	(845)	-19.7%
State School Fund	266,607	263,622	28.0%	(2,985)	-1.1%
State Common School Fund	5,012	5,628	0.6%	616	12.3%
Investment earnings	12,534	3,107	0.3%	(9,427)	-75.2%
Other	17,648	10,113	1.1%	(7,535)	-42.7%
Total General Revenues	823,400	822,868	87.5%	(532)	-0.1%
Total Revenues	933,111	939,936	100.0%	6,825	0.7%
Expenses					
Instruction	429,149	465,995	50.0%	36,846	8.6%
Support services	324,513	376,660	40.4%	52,147	16.1%
Enterprise & community services	21,821	23,731	2.5%	1,910	8.8%
Facilities services	3,492	10,844	1.2%	7,352	210.5%
Interest & fees on long-term debt	45,409	54,640	5.9%	9,231	20.3%
Total Expenses	824,384	931,870	100.0%	107,486	13.0%
Change in net position	108,727	8,066	21.0%	(100,661)	-92.6%
Net position - beginning of year	(78,344)	30,383	79.0%	108,727	138.8%
Net position - end of year	$ 30,383	$ 38,449	100.0%	$ 8,066	-26.5%

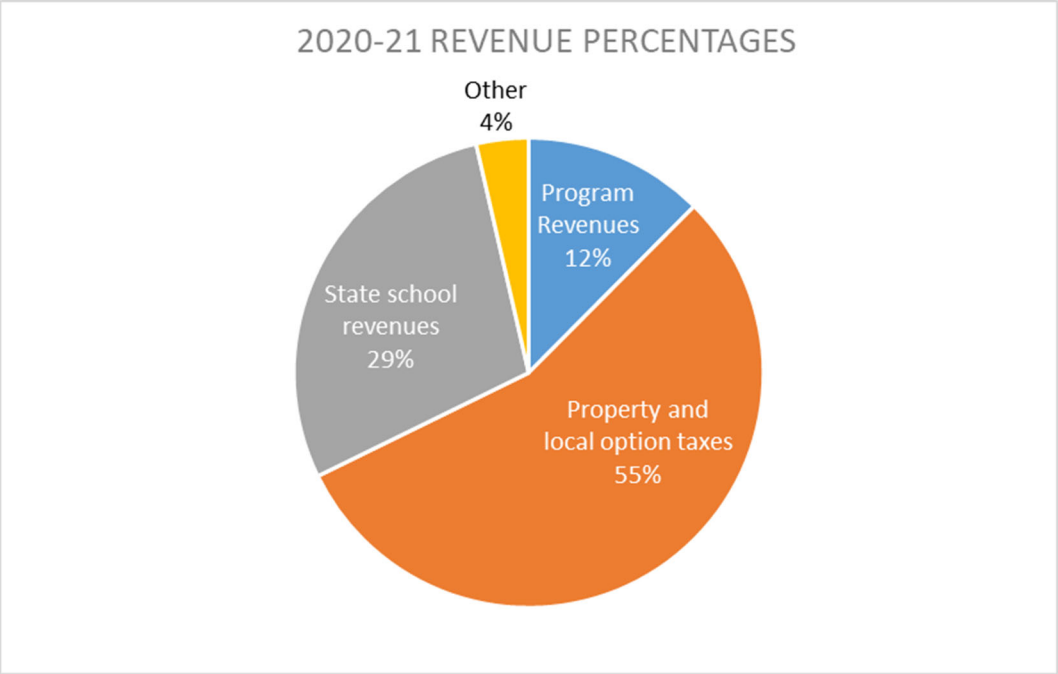
The Statement of Activities of the government-wide financial statements distinguishes functions that are principally supported by taxes and intergovernmental revenues (governmental activities) from other functions that are intended to recover all or a significant portion of their costs through user fees and charges (business-type activities). Portland Public Schools currently does not have any business-type or enterprise fund activities. Additional detail regarding revenue and expense changes are presented to provide a better understanding of the District's operations in fiscal year 2020 to 2021 compared to fiscal year 2019 to 2020.

The District's mission is to provide a free and appropriate public education for K-12 students within its boundaries. The District may not charge for its core services, but does charge for non- core services such as facilities rentals and activities fees. Per USDA guidance, free meals were available to all students during the 2020-21 school year. Therefore, general revenues, primarily property taxes and State School Funds, provide most of the funding required for governmental programs.

Revenue and Expenses: 2020 compared to 2021

Revenues for 2021 were $939.9 million, an increase of $6.8 million, or 0.7 percent, from prior year revenues of $933.1 million. Operating grants and contributions revenues increased by $23.8 million due to increased funding.





Expenses for the District's program activities include Instruction, Support Services, Enterprise and Community Services, Facilities Services, and Interest and Fees on Long-term Debt. The District's activities mirror its chart of accounts which is mandated by the Oregon Department of Education for all Oregon public schools.

Current year total expenses were $931.9 million, which is a 13.0 percent, or $107.5 million, increase over the prior year. Instruction expenses increased $36.8 million, or 8.6 percent, compared to 2019-20, which was primarily driven by increases in wages due to step and COLA increases. Support Services expenses increased $52.1 million, or 16.1 percent, over the prior year, which was primarily driven by increases in costs related to CDL supports including investments in technology and software and other COVID-related supports. Instruction and support services together accounted for 90.4 percent of the District's total expenses in fiscal year 2020-21, compared to 91.5 percent spent in fiscal year 2019-20 on these same categories.

FINANCIAL ANALYSIS OF THE DISTRICT'S MAJOR FUNDS

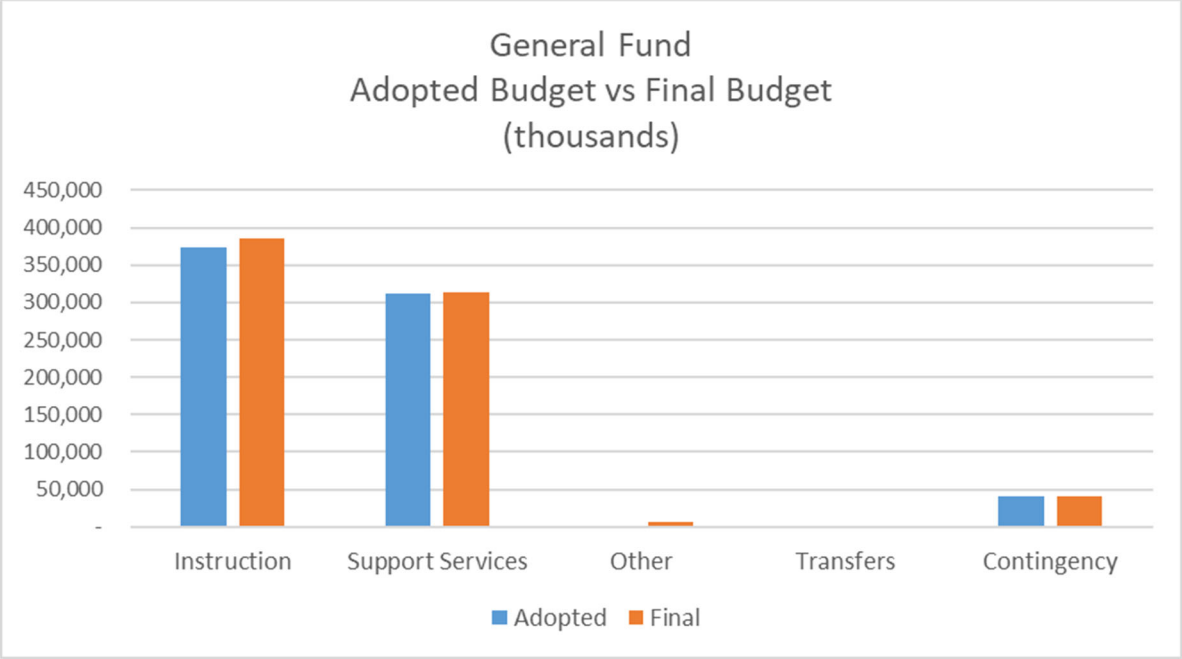
As noted earlier, the District uses fund accounting to ensure and demonstrate compliance with finance- related legal requirements. The focus of the District's governmental funds is to provide information on near-term inflows, outflows, and balances of expendable resources. Such information is useful in assessing the District's financial requirements. In particular, unassigned fund balance may serve as a useful measure of the District's net resources available for spending at the end of the fiscal year.

General Fund. The General Fund is the major operating fund of the District. The fund's ending fund balance increased by $24.2 million to $88.7 million for fiscal year 2020-21. The General Fund saw an increase of $10.8 million in revenue, largely due to an increase in property taxes offset by a reduction in investment income. Instructional expenditures and support services costs remained relatively flat year-over-year.

Special Revenue Fund. Special Revenue Fund revenue increased by $19.7 million, or 19.7%, for fiscal year 2020-21. This increase was driven by an increase of $28.3 million in federal and state support. There was roughly a $1 million increase in revenue for Nutrition expenses related to the Summer Meals Program extending through the FY. There was roughly a $11 million increase in Education Stabilization Funds (ESSER) revenue expenses related to increased costs due to the COVID-19 pandemic. With the added State funding for the Student Investment Account we had an increase of revenue of about $11.5 million. In addition, we had an increase of local revenue in the Dedicated Resource Fund, a subfund of the Special Revenue Fund, of roughly $1.1 million. These revenue increases were offset by reductions in the School Fund of about $3.7 million and the PERS Rate Stabilization Reserve of $300k. Expenditures across the fund increased by $26.2 million that were largely related to Wages and Benefits as well as increases in Materials and Services.

BUDGETARY HIGHLIGHTS FOR THE GENERAL FUND

Adopted budget compared to final budget. There were two amendments to the 2020-21 budget. The amendments allocated funds across Instruction and Support Services, reduced funding across Instruction and Support Services to reflect a reduction in SIA allocation, allocated additional funding across appropriations to recognize new Special Revenue Fund resources, and adjusted appropriations across Support Services and Enterprise and Community Services to align the budget with intended expenditures of additional resources.



Final budget compared to actual results. In fiscal year 2020-21 the District underspent the final General Fund budget by $50.6 million before contingency, or roughly 7.2%. Salaries and associated payroll costs across Instruction and Support Services accounted for $9.7 million of the underspend, while non-personnel expenditures made up the other $40.1 million. PPS remained closed for almost a year following the Governor's order on March 12, 2020 directing public schools to remain closed state-wide due to the health threat posed by the novel infectious coronavirus (COVID-19). The Governor issued an executive order on March 12, 2021 requiring public elementary schools to reopen no later than March 29, 2021 for hybrid or full-time in-person instruction. The order also required public schools to open for grades 6-12 by April 19, 2021. PPS participated in a CDL model followed by a hybrid instructional model for the 2020-21 school year in accordance with the Governor's order and is back to in-person instruction for the 2021-22 school year.

	Final Budget vs Actual Expenditures (thousands)			
	Final Budget	Actual Expenditures	$ Change	% of Budget
Instruction	$ 386,098	$ 363,865	$ (22,234)	94.2%
Support Services	313,406	285,719	(27,687)	91.2%
Other Objects	5,814	5,115	(699)	88.0%
Transfers	1,234	1,198	(36)	0.0%
	706,552	655,897	(50,655)	92.8%
Operating Contingency	40,946	-	(40,946)	0.0%
	$ 747,498	$ 655,897	$ (91,601)	87.7%

Spending changes associated with the CDL and hybrid education models are reflected in the difference between the final budget and actual expenditures for 2020-21.

CAPITAL ASSETS AND DEBT ADMINISTRATION

Capital Assets. The District's investment in capital assets includes land, building and improvements, vehicles and equipment, and construction in progress. As of June 30, 2021, the District had invested $1.17 billion in capital assets, net of depreciation and amortization, as shown in the following table:

Capital assets	Government-wide (thousands)			
	2020	2021	$ Change	% change
Land	$ 9,174	$ 9,174	$ -	0.0%
Buildings and site improvements	881,218	933,782	52,564	6.0%
Vehicles and equipment	39,376	39,946	570	1.4%
Construction in progress	272,766	498,505	225,739	82.8%
	1,202,534	1,481,407	278,873	23.2%
less accumulated depreciation	(285,162)	(308,036)	(22,874)	8.0%
Capital assets, net of depreciation	$ 917,372	$ 1,173,371	$ 255,999	27.9%

District-wide, capital assets increased by $256.0 million in fiscal year 2020-21, and the District recognized $22.9 million of depreciation and amortization. Capital construction accounted for the majority of the increase. Further discussion of capital assets can be found in Note 7 of the financial statements.

Debt Administration. At the end of the current fiscal year, the District had total debt outstanding of $1.43 billion (excluding premiums and discounts), which is comprised of limited tax pension and refunding bonds ($314.2 million) and debt backed by the full faith and credit of the District ($1,113.9 million). During fiscal year 2020-21, the District reduced debt by making scheduled debt service payments of $170.2 million and issued the $419.4 million in series 2020 GO Bonds. Further explanation of debt is shown in Note 10 of the Financial Statements.

Outstanding Debt	Government-wide (thousands)				
	2020	Increases	Decreases	2021	% change
Limited tax pension and refunding bonds	$ 336,062	$ -	$ (21,903)	$ 314,159	-6.5%
Other debt	842,779	419,430	(148,266)	1,113,943	32.2%
Total Long Term Debt	1,178,841	419,430	(170,169)	1,428,102	
Unamortized Bond Premium/(Discount)	105,909	31,205	(11,483)	125,631	18.6%
Total Long Term Debt, net of Premium (Discount)	$ 1,284,750	$ 450,635	$ (181,652)	$ 1,553,733	20.9%

State statutes limit the amount of general obligation debt a school district may issue based on a formula for determining the percentage of the Real Market Value of all taxable properties within the District. The District's general obligation bond debt capacity is 7.95 percent of Real Market Value or $11.1 billion.

OPERS is Oregon's public pension system. Under the pension plan, the actuarial liability is the present value of the plan's current and expected benefits payments (plus administrative expenses). If the fund's actuarial liability exceeds its assets, then the fund has a shortfall that is known as a Net Pension Liability ("NPL"). OPERS requires that school Districts pay (or "amortize") this NPL over a period of 20 years (Tier One / Tier Two portion) and 10 years (Retiree Health Insurance Account portion). Since interest rates had been at historic lows, an opportunity to benefit from lowered interest was created.

The District participated in the Oregon School Board Association ("OSBA") sponsored pooled pension obligation bond program, in which the proceeds from bond issues were put into a PERS "side account" and used to offset a portion of the OPERS Net Pension Liability (NPL). The reduced contribution rate charged for the NPL that has resulted from the District's decision to borrow, has saved an estimated $40.1 million in the current year; savings that the District has used to provide more instruction and support services. Over time, this reduction in rates could dampen the effects of future increases in the District's NPL. As long as OPERS' investment returns exceed the costs of servicing the bonds, the benefits of this program will exceed the costs. The District's NPL was reduced but was not eliminated by these borrowing transactions. Statutes, legislation, regulations, and rules regarding OPERS can change at any time.

NEXT YEAR'S BUDGET AND ECONOMIC FACTORS

The 2021-22 school year will see our students and staff returning after a year of distance learning and remote working due to the COVID pandemic. The budget will continue to support the Strategic Plan and Vision: PPS Reimagined as well as the goals set by the Board. The budget coincides with the Oregon Legislature's biennial budget cycle for 2021-23, which includes a $9.3 billion State School Fund, and full funding for SIA and M98. The biggest unknown within the budget is enrollment, the 2020-21 school year saw a stark decline in enrollment. The State School Fund formula for revenue is based on the higher of two years (current or the previous year). This factor allowed PPS to maintain funding for the 2020-21 school year without a drastic decrease in resources. The 2021-22 budget was built on an enrollment projection pre-pandemic and will be monitored closely throughout the year for alignment and possible adjustments that will need to be made.

The 2021-22 investments include pandemic response, continued focus on racial equity, and strategic and priority investments. The budget supports additional FTE for Learning Acceleration and support for the return to school, expansion or enhancement of Saturday School, Summer Programming, Summer Scholars, Virtual Scholars, Evening Scholars, Online Learning Academy, and wrap-around services for our students and families. Additionally, investments are being made in curriculum, technology, staffing levels, and class sizes as well as Title I, Comprehensive Support & Improvement (CSI), and Targeted Support & Improvement (TSI) schools.

Population and enrollment trends in Portland show increases in the overall population within the PPS boundary, from 505,000 in 2017 to a mid-range forecast of 598,000 by 2040. However, declining fertility rates among the fastest-growing cohort of the population, young adults (20 to 34-year-olds) suggest that the population of school-aged children will stay relatively flat, not keeping pace with the overall population growth.

Enrollment for the District as of October 1, 2020, was 47,314 students, down significantly from 49,478 in 2019-20. Nearly all of the K-12 enrollment decline was attributable to choices that families made in response to distance learning during the pandemic. The greatest impact of the pandemic was seen in kindergarten where PPS enrolled 629 fewer students as compared to the fall of 2019.

The 2021-22 budget uses the mid-range PSU forecast, which projects K-12 enrollment to rebound to 48,649 in 2021-22, returning to pre-pandemic assumptions. However, after this recovery enrollment is projected to decline over the next several years reaching a low in 2029-30 of 45,518. There is a risk that enrollment in 2021-22 will fall short of projections if some families are hesitant to return due to COVID, or if they continue to choose other schooling options.

The Oregon state economy and labor market has steadily increased during the past year. Oregon's unemployment rate has decreased from 11.6% in June of 2020 to 5.6% in June of 2021. Overall, Oregon's labor market is expected to return to full health during the upcoming 2021-23 biennium. Total employment in Oregon is expected to surpass pre-pandemic levels in late 2022 with the unemployment rate returning to near 4.0 percent in 2023.

REQUESTS FOR INFORMATION

This financial report is designed to provide a general overview of Portland Public Schools' finances for all those with an interest in the District's finances. Questions concerning any of the information provided in the report or requests for additional financial information should be addressed to the Finance Department, Portland Public Schools, 501 N Dixon, Portland, OR, 97227. An electronic copy of this and other prior- year financial reports is available at the District website: http://www.pps.net/Page/2184.

PPS

BASIC FINANCIAL STATEMENTS

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Statement of Net Position
June 30, 2021
(amounts expressed in thousands)

	Governmental Activities
ASSETS	
Cash and cash equivalents-unrestricted	$ 357,945
Cash and cash equivalents held by fiscal agents	5,121
Investments	662,435
Accounts and other receivables	45,172
Property taxes and other taxes receivable	13,721
Inventories	1,811
Prepaid items	5,098
Total current assets	1,091,303
Noncurrent assets:	
Net OPEB asset-RHIA	5,966
Capital assets, not depreciated:	
Land	9,174
Construction in progress	498,505
Capital assets, net of accumulated depreciation:	
Buildings and capital improvements	656,573
Vehicles and equipment	9,119
Total assets	2,270,640
DEFERRED OUTFLOWS OF RESOURCES	
OPEB contributions subsequent to measurement date	7,797
OPEB differences between expected and actual experience	2,510
OPEB differences between actual and expected earnings	663
OPEB differences due to changes in assumptions	7,630
OPEB changes in employer proportion	392
Pension changes in employer proportion	99,561
Pension differences between expected and actual experience	23,083
Pension differences due to changes in assumptions	28,020
Pension differences between actual and expected earnings	61,301
Pension contributions subsequent to measurement date	18,623
Total deferred outflows of resources	249,580

The notes to the basic financial statements are an integral part of this financial statement.

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Statement of Net Position (continued)
June 30, 2021
(amounts expressed in thousands)

LIABILITIES		
Accounts payable	$	63,356
Accrued wages and benefits payable		104,361
Unearned revenues		2,044
Claims payable		5,574
Non-current liabilities:		
Due within one year		
Accrued compensated absences		3,578
Bonds		126,601
Accrued bond interest payable		23,052
Due in more than one year		
Accrued compensated absences		3,248
Bonds		1,427,132
Accrued bond interest payable		15,634
Net pension liability- PERS		521,329
Total pension liability-stipend		6,090
Total OPEB liability-RHIS		78,581
Total liabilities		2,380,580
DEFERRED INFLOWS OF RESOURCES		
OPEB differences between expected and actual experience		2,978
OPEB differences due to changes in assumptions		1,759
OPEB changes in employer proportion		34
Pension differences due to changes in assumptions		1,053
Pension differences between employer contribution and proportionate share of contributions		57,952
Pension changes in employer proportion		37,415
Total deferred inflows of resources		101,191
NET POSITION		
Net investment in capital assets		717,881
Restricted for:		
Capital projects		757,216
Grants		12,879
Student body activities		5,074
Nutrition services		2,488
Debt service		13,353
Net OPEB asset-RHIA		5,966
Unrestricted (deficit)		(1,476,408)
Total net position	$	38,449

The notes to the basic financial statements are an integral part of this financial statement.

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Statement of Activities
For the year ended June 30, 2021
(amounts expressed in thousands)

Functions/Programs	EXPENSES	PROGRAM REVENUES			Net (Expense) Revenue and Changes in Net Position
		Charges for Services	Operating Grants and Contributions	Capital Grants and Contributions	Governmental Activities
GOVERNMENTAL ACTIVITIES					
Instruction	$ 465,995	$ 288	$ 56,627	$ -	$ (409,080)
Support services	376,660	1,472	52,678	-	(322,510)
Enterprise and Community Services	23,731	154	4,530	-	(19,047)
Facilities Services	10,844	-	-	1,319	(9,525)
Interest and fees on long-term debt	54,640	-	-	-	(54,640)
Total governmental activities	$ 931,870	$ 1,914	$ 113,835	$ 1,319	(814,802)
GENERAL REVENUES					
Property taxes levied for general purposes					286,437
Property taxes levied for debt service					131,791
Construction excise tax					3,446
Local option taxes levied for general purposes					101,539
State School Fund - general support					263,622
State Common School Fund - general support					5,628
County and intermediate sources - general support					17,185
Investment earnings					3,107
Other					10,113
Total general revenues					822,868
Change in net position					8,066
Net position - beginning of year					30,383
Net position - end of year					$ 38,449

The notes to the basic financial statements are an integral part of this financial statement.

PPS

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Governmental Funds
Balance Sheet
June 30, 2021
(amounts expressed in thousands)

	General Fund	Special Revenue Fund
ASSETS		
Cash and cash equivalents-unrestricted	$ 158,611	$ 33,475
Cash and cash equivalents held by fiscal agents	4,664	-
Investments	-	4,570
Prepaid items	628	-
Accounts receivable	1,519	40,495
Property taxes and other taxes receivable	10,509	-
Due from other funds	40,975	744
Inventories	317	1,494
Total assets	$ 217,223	$ 80,778
LIABILITIES		
Accounts payable	$ 20,567	$ 3,538
Accrued wages and benefits	98,076	5,998
Due to other funds	744	40,975
Unearned revenues	-	2,044
Total liabilities	119,387	52,555
DEFERRED INFLOWS OF RESOURCES		
Unavailable property tax revenue	9,145	-
Total deferred inflows of resources	9,145	-
FUND BALANCES		
Nonspendable	945	1,494
Restricted	-	20,441
Committed	-	19,056
Assigned	-	-
Unassigned	87,746	(12,768)
Total fund balances	88,691	28,223
Total liabilities, deferred inflows and fund balances	$ 217,223	$ 80,778

The notes to the basic financial statements are an integral part of this financial statement.

Debt Service Fund	Capital Projects Fund	Total Governmental Funds
$ 10,874	$ 145,617	$ 348,577
457	-	5,121
-	657,865	662,435
-	4,170	4,798
-	3,158	45,172
3,212	-	13,721
-	-	41,719
-	-	1,811
$ 14,543	$ 810,810	$ 1,123,354
$ -	$ 38,996	$ 63,101
-	224	104,298
-	-	41,719
-	-	2,044
-	39,220	211,162
2,871	-	12,016
2,871	-	12,016
-	4,170	6,609
10,482	757,216	788,139
1,190	-	20,246
-	10,204	10,204
-	-	74,978
11,672	771,590	900,176
$ 14,543	$ 810,810	$ 1,123,354

The notes to the basic financial statements are an integral part of this financial statement.

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Reconciliation of the Balance Sheet to the Statement of Net Position
June 30, 2021
(amounts expressed in thousands)

Fund balances - governmental funds (page 36)	$	900,176
Amounts reported for governmental activities in the Statement of Net Position are different because:		
Capital assets are not financial resources and are not reported in governmental funds.		1,173,371
Long-term taxes and other receivables are not available to pay for current-period expenditures and therefore are a deferred infow of resources in the governmental funds.		12,016
Assets, deferred outlows, liabilities and deferred inflows of the internal service funds are included in activities in the Statement of Net Position.		6,281
Bonds payable are not due and payable in the current period and therefore are not reported in the governmental funds.		(1,553,733)
Actuarially determined pension activity is not reported in the governmental funds.		(393,060)
Accrued compensated absences are reported when earned as a liability in the Statement of Net Position while in the governmental funds only the unpaid balance of reimbursable unused vacation is reported as a liability.		(6,826)
Accrued property and liability insurance claims incurred but not reported are not due and payable in the current period and therefore are not reported in the governmental funds.		(2,724)
Accrued interest payable is not recognized as a liability in the governmental funds.		(38,686)
Actuarially determined OPEB activity is not reported in the governmental funds.		(58,366)
Net position of governmental activities (page 33)	$	38,449

The notes to the basic financial statements are an integtral part of this financial statement.

PPS

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Governmental Funds
Statement of Revenues, Expenditures, and Changes in Fund Balances
For the year ended June 30, 2021
(amounts expressed in thousands)

	General Fund	Special Revenue Fund
REVENUES		
Property and other taxes	$ 286,029	$ 309
State School Fund	263,622	-
State Common School Fund	5,628	-
Federal and state support	18	107,293
Local option taxes	102,417	-
County and intermediate sources	14,381	2,804
Charges for services	1,642	256
Extracurricular activities	-	1,237
Investment earnings	544	81
Other	5,681	7,446
Total revenues	679,962	119,426
EXPENDITURES		
Current:		
Instruction	363,865	53,247
Support services	285,719	54,985
Enterprise and community services	5,115	18,799
Facilities acquisition and construction	-	27
Debt Service:		
Principal	-	-
Interest and fiscal charges	-	-
Total expenditures	654,699	127,058
Excess (deficit) of revenues over expenditures	25,263	(7,632)
OTHER FINANCING SOURCES (USES)		
Transfers in	-	716
Transfers out	(1,198)	(651)
Proceeds from the sale of capital assets	152	-
Issuance of bonds	-	-
Issuance of refunding bonds	-	-
Premium on issuance of debt	-	-
Payment to refunded bond escrow agent	-	-
Total other financing sources (uses)	(1,046)	65
Net change in fund balances	24,217	(7,567)
Fund balances - beginning of year	64,474	35,790
Fund balances - end of year	$ 88,691	$ 28,223

The notes to the basic financial statements are an integral part of this financial statement.

Debt Service Fund	Capital Projects Fund	Total Governmental Funds
$ 131,818	$ 3,446	$ 421,602
-	-	263,622
-	-	5,628
53	1,319	108,683
-	-	102,417
-	-	17,185
55,146	15	57,059
-	-	1,237
292	2,101	3,018
-	1,501	14,628
187,309	8,382	995,079
-	-	417,112
-	6,710	347,414
-	-	23,914
-	287,511	287,538
119,759	-	119,759
72,016	-	72,016
191,775	294,221	1,267,753
(4,466)	(285,839)	(272,674)
1,750	-	2,466
-	(617)	(2,466)
-	-	152
-	365,465	365,465
53,965	-	53,965
1,631	29,574	31,205
(55,031)	-	(55,031)
2,315	394,422	395,756
(2,151)	108,583	123,082
13,823	663,007	777,094
$ 11,672	$ 771,590	$ 900,176

The notes to the basic financial statements are an integral part of this financial statement.

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Reconciliation of the Statement of Revenues,
Expenditures, and Changes in Fund Balances to the Statement of Activities
For the year ended June 30, 2021
(amounts expressed in thousands)

Net change in fund balances - total governmental funds (page 40)	$ 123,082
Amounts reported for governmental activities in the Statement of Activities are different because:	
Governmental funds report all capital outlay as expenditures. However, in the Statement of Activities the cost of certain assets is allocated over their estimated useful lives and reported as depreciation expense. This is the amount by which capital outlays in the current period of $286,397 exceeded depreciation and disposals of $30,398.	255,999
Property tax revenues that do not provide current financial resources are not reported as revenues in the governmental funds. This is the change in deferred inflow of resources related to property taxes.	(402)
The Internal Service Fund is used to account for all costs incurred for claims arising from workers' compensation losses. The primary funding sources are charges to other funds. This amount is the change in net position for the year.	650
Incurred but not reported property and liability insurance claims expenses are reported in the Statement of Activites but they are not reported as expenditures in the governmental funds.	419
The issuance of long-term debt (e.g., bonds, leases) provides current financial resources to governmental funds, while the repayment of the principal of long-term debt consumes the current financial resources of governmental funds. Neither transaction, however, has any effect on the change in net position. Also, governmental funds report the effect of issuance costs, premiums, and similar items when debt is first issued. Premium amounts are deferred and amortized in the Statement of Activities.	(268,983)
Pension actuarial liability activity is reported in the Statement of Activities but not in the governmental funds.	(112,459)
Other Post Employment Benefits actuarial liability activity is reported in the Statement of Activities but not in the governmental funds.	786
Change in compensated absences	(1,540)
Change in bond interest payable	10,514
Change in net position of governmental activities (page 33)	$ 8,066

The notes to the basic financial statements are an integtral part of this financial statement.

PPS

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Proprietary Fund - Internal Service Fund
Statement of Net Position
June 30, 2021
(amounts expressed in thousands)

ASSETS		
Current Assets		
Cash and cash equivalents	$	9,368
Prepaid items		300
Total current assets		9,668
Noncurrent Assets		
Net OPEB asset-RHIA		3
Total assets		9,671
DEFERRED OUTFLOWS OF RESOURCES		
OPEB contributions after measurement date		4
OPEB differences due to changes in assumptions		4
OPEB differences between expected and actual experience		1
Pension contributions after measurement date		9
Pension changes in employer proportion		48
Pension differences between expected and actual experience		11
Pension differences between actual and expected earnings		29
Pension differences due to changes in assumptions		14
Total deferred outflows of resources		120
Total assets and deferred outflows		9,791
LIABILITIES		
Current Liabilities		
Accounts payable		255
Accrued wages and benefits		63
Claims payable		2,850
Total current liabilities		3,168
Long-term Liabilities		
Total OPEB liability- RHIS		38
Net pension liability- PERS		252
Total pension liability-stipend		3
Total long term liabilities		293
Total liabilities		3,461
DEFERRED INFLOWS OF RESOURCES		
OPEB differences due to changes in assumptions		1
OPEB differences between expected and actual experience		1
Pension differences due to changes in assumptions		1
Pension changes in employer proportion		18
Pension differences between employer contribution and proportionate share of contributions		28
Total deferred inflows of resources		49
Total liabilities and deferred inflows of resources		3,510
NET POSITION		
Restricted for Net OPEB asset-RHIA		3
Unrestricted		6,278
Total net position	$	6,281

The notes to the basic financial statements are an integral part of this financial statement.

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Proprietary Fund - Internal Service Fund
Statement of Revenues, Expenses, and Changes in Net Position
For the year ended June 30, 2021
(amounts expressed in thousands)

OPERATING REVENUES		
Charges for services	$	1,534
Insurance recoveries		4
Total operating revenues		1,538
OPERATING EXPENSES		
Salaries and benefits		330
Materials and services		276
Claims expense		559
Total operating expenses		1,165
Operating income		373
NON-OPERATING REVENUES		
Federal and state support		188
Investment earnings		89
Total non-operating revenues		277
Change in net position		650
Net position - beginning of year		5,631
Net position - end of year	$	6,281

The notes to the basic financial statements are an integtral part of this financial statement.

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Proprietary Fund - Internal Service Fund
Statement of Cash Flows
For the year ended June 30, 2021
(amounts expressed in thousands)

CASH FLOWS FROM OPERATING ACTIVITIES		
Cash received from interfund services provided and used	$	1,534
Cash received from insurance recoveries		4
Cash payments for salaries and benefits		(283)
Cash payments for goods and services		(281)
Cash payments for claims		(1,420)
Net cash provided by (used for) operating activities		(446)
CASH FLOWS FROM NONCAPITAL FINANCING ACTIVITIES		
Cash subsidy from state return to work reimbursements		188
Net cash provided by (used for) noncapital financing activities		188
CASH FLOWS FROM INVESTING ACTIVITIES		
Sale of investments		5,035
Investment earnings		89
Net cash provided by investing activities		5,124
Net increase in cash and cash equivalents		4,866
Cash and cash equivalents at beginning of year		4,502
Cash and cash equivalents at end of year	$	9,368
RECONCILIATION OF OPERATING INCOME TO CASH FROM OPERATING ACTIVITIES		
Operating income	$	373
Adjustments to reconcile operating income to net cash from operating activities:		
Decrease in accounts and other payables		(5)
Decrease in claims payable		(861)
Increase in accrued wages and benefits		13
Increase in pension related deferred outflows		(35)
Increase in pension liability and pension related deferred inflows		73
Decrease in OPEB asset and OPEB related deferred outflows		2
Decrease in OPEB liability and OPEB related deferred inflows		(6)
Total adjustments		(819)
Net cash provided by operating activities	$	(446)

The notes to the basic financial statements are an integtral part of this financial statement.

PPS

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

School District No. 1J, Multnomah County, Oregon, known as Portland Public Schools or the District, is governed by a seven-member elected board. The District is the special-purpose primary government exercising financial accountability for all public K-12 education within its boundaries. As required by accounting principles generally accepted in the United States of America, the accompanying financial statements present all significant activities and organizations of the District. The District reports no component units, nor is the District a component unit of any other entity, and specifically has no relationship or connection with Multnomah County, Oregon.

The financial statements of the District have been prepared in conformity with accounting principles generally accepted in the United States of America (GAAP) as applied to governmental units. The Governmental Accounting Standards Board (GASB) is the governing body and establishes governmental accounting and financial reporting principles. The more significant of the District's accounting policies are described below.

A. Government-wide and fund financial statements

The government-wide financial statements (i.e., the Statement of Net Position and the Statement of Activities) report information on all of the activities of the District. For the most part, the effect of interfund activity has been removed from these statements except that interfund services provided and used are not eliminated in the process of consolidation.

The Statement of Activities demonstrates the degree to which the direct expenses of a given function or segment is offset by program revenues. Direct expenses are those that are clearly identifiable with a specific function or segment. Program revenues include 1) charges to customers who purchase or use goods, services, or privileges provided by a given function and 2) grants and contributions that are restricted to meeting the operational or capital requirements of a particular function. Taxes and other items not properly included among program revenues are reported instead as general revenues. Certain functional expenses contain an element of indirect cost.

Separate financial statements are provided for Governmental Funds and the Self-Insurance Fund, which is an internal service fund (proprietary fund). The Self-Insurance Fund is included in the government-wide financial statements. Major individual governmental funds are reported as separate columns in the fund financial statements. In the internal service fund, all revenues and expenses except interest earnings, transfers, and federal and state support are considered to be related to operations.

Measurement focus, basis of accounting, and financial statement presentation

The government-wide financial statements are reported using the economic resources measurement focus and the accrual basis of accounting, as are the proprietary fund financial statements. Revenues are recorded when earned and expenses are recorded when a liability is incurred, regardless of the timing of related cash flows. Property taxes are recognized as revenues in the year for which they are levied. Grants and similar items are recognized as revenue as soon as all eligibility requirements imposed by the provider have been met.

Governmental fund financial statements are reported using the current financial resources measurement focus and the modified accrual basis of accounting. Revenues are recognized as soon as they are both measurable and available. Revenues are considered to be available when they are collectible within the current period or soon enough thereafter to pay liabilities of the current period. For this purpose, the District considers revenues to be available if they are collected within 60 days of the end of the current fiscal year. Expenditures generally are recorded when a liability is incurred, as under accrual accounting. However, debt service and expenditures related to compensated absences are recorded only when payment is due.

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES – continued

A. Government-wide and fund financial statements - continued

Measurement focus, basis of accounting, and financial statement presentation – continued

Property taxes and grant reimbursements are considered to be susceptible to accrual, if received in cash by the District or a county collecting such taxes within 60 days after year-end. All other revenue items are recognized in the accounting period when they become both measurable and available. Measurable means the amount of the transaction can be determined. Available means collectible within the current fiscal year or soon thereafter.

The District reports the following major governmental funds:

General Fund – Accounts for the general operations of the District. The General Fund accounts for all financial resources except those required to be accounted for in another fund. The General Fund's resources are available to the District for any purpose provided they are expended or transferred according to a resolution or policy of the District and/or the laws of Oregon.

Special Revenue Fund – Accounts for revenues and expenditures that are restricted and committed for specific projects. Principal revenue sources are federal, state and local funding.

Debt Service Fund – Accounts for the accumulation of financial resources for the payment of long-term debt principal, interest and related costs. Current debt instruments include General Obligation (GO) bonds, Limited Tax Pension Obligations and Full Faith and Credit Obligations.

Capital Projects Fund – Accounts for financial resources to be used for the acquisition of property, technology, construction or renovation of facilities.

Additionally, the District reports the following internal service fund:

Self-Insurance Fund – Accounts for all workers' compensation activities. The activity and balances of this fund are included in the governmental activities in the government-wide financial statements. The primary resources are charges to other funds, investment earnings and federal and state support. All revenues except for investment revenues and transfers in are considered operating revenue. Operating expenses include salaries, benefits, materials, premium costs, claims, and other related costs.

B. Appropriations and Budgetary Controls

The District prepares a budget for all funds in accordance with the modified accrual basis of accounting, with certain adjustments, and legal requirements set forth in Local Budget Law.

Consistent with Local Budget Law, expenditures are appropriated by fund for each legally adopted annual operating budget at the following levels of control, as appropriate:

- Instruction
- Support Services
- Enterprise and Community Services
- Facilities Acquisition and Construction
- Debt Service
- Contingency
- Fund Transfers

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES – continued

Capital outlay expenditures are appropriated within the service levels for Instruction, Support Services, Enterprise and Community Services, and Facilities Acquisition and Construction. Debt service expenditures in the General Fund are generally appropriated within the Support Services level of control. For reporting purposes all other debt service expenditures are segregated from the supporting services budgetary control levels and are presented in the debt service expenditures category.

After the original budget is adopted, the Board of Education may approve appropriation transfers between the levels of control without limitation. Supplemental appropriations may be approved by the Board of Education if any occurrence, condition, or need exists which had not been anticipated at the time the budget was adopted. An appropriations transfer that alters estimated total expenditures by less than 10.00 percent of any individual fund may be adopted at the regular meeting of the Board of Education. For conditions that require either supplemental appropriations or an increase in expenditures greater than 10.00 percent of an individual fund, a supplemental budget must be adopted, requiring public hearings, publications in newspapers and approval by the Board of Education. Supplemental budgets are submitted, reviewed and certified, similar to the original budget, by the Multnomah County Tax Supervising and Conservation Commission subsequent to approval by the Board of Education. Appropriations lapse at the end of each fiscal year. The District had two supplemental budgets during budget year 2021.

C. Encumbrances

During the year encumbrances are recorded in the accounting records when purchase orders are issued. The use of encumbrances indicates to District employees that appropriations are committed. All encumbrances expire at year-end.

D. Cash and Cash Equivalents and Investments

For the purpose of the Statement of Cash Flows, the Statement of Net Position and the Balance Sheet, the District's monies in the Oregon Local Government Investment Pool, savings deposits, demand deposits and cash with fiscal agents are considered to be cash and cash equivalents. Investments with a remaining maturity of more than one year at the time of purchase are stated at fair value. Other investments are stated at amortized cost, which approximates fair value.

E. Property Taxes

Uncollected real and personal property taxes are reflected on the Statement of Net Position and the Balance Sheet as receivables. Under state law, county governments are responsible for extending authorized property tax levies, computing tax rates, billing and collecting all property taxes, and making periodic distributions of collections to entities levying taxes. Property taxes become a lien against the property when levied on July 1 of each year and are payable in three installments due on November 15, February 15 and May 15. Property tax collections are distributed monthly except for November, when such distributions are made weekly.

F. Inventories and Prepaid Items

Inventories of school operating supplies, maintenance supplies, and food and other cafeteria supplies are stated at cost using the weighted average method. A portion of the inventory consists of commodities purchased from the United States Department of Agriculture (USDA). The commodities are recorded at wholesale market value as provided by the USDA. The District accounts for inventory based on the consumption method. Under the consumption method, inventory is recorded when purchased and expenditures are recorded when inventory items are used. Donated foods consumed during the year are reported as revenues and expenditures. The amount of unused donated food at year-end is immaterial.

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES – continued

Prepaid insurance is related to capital bond construction activity. Prepaid assets are recognized as expenses/expenditures based on the consumption method when their use benefits the District.

G. Capital Assets

Expenditures for capital assets, which include land, buildings and site improvements, construction in progress, and vehicles and equipment are reported in the Statement of Revenues, Expenditures, and Changes in Fund Balance by function. The District defines capital assets as assets with an initial cost exceeding the threshold amounts shown in the schedule below, and an estimated useful life in excess of one year. District capital assets are recorded at historical cost, or estimated historical cost if purchased or constructed, and depreciated or amortized, where appropriate, using the straight-line method. Donated capital assets are recorded at acquisition value at the date of donation. Major outlays for capital assets and improvements are recorded as construction in progress and capitalized as projects are completed. When the District determines that an asset has been impaired as defined by GASB Statement No. 42 it adjusts the asset value. Under the pronouncements of GASB Statement No. 51 the District capitalizes intangible asset costs, such as costs relating to internally developed computer software. The intangible asset costs are classified as equipment.

Major asset classifications, useful lives and capitalization thresholds are as follows:

Asset	Capitalization threshold	Useful lives, years
Buildings	$ 25	100
Land & site improvements	25	5 to 25
Equipment	5	5 to 15
Vehicles	5	5 to 8

H. Grant Accounting

Unreimbursed expenditures due from grantor agencies are recorded in the financial statements as accounts receivable and revenues. Cash received from grantor agencies in excess of related grant expenditures is reflected as unearned revenue on the Statement of Net Position and the Balance Sheet.

I. Insurance

The District operates the Self-Insurance Fund to account for the costs of workers' compensation related costs and resources. Charges to other funds are recognized as revenues and as expenditures in the fund incurring the charges. The District accounts for all other insurance related resources and costs, such as general liability claims, property and fire loss claims, and the payment of premiums through the General Fund.

The District recognizes the liabilities for estimated losses to be incurred from pending claims and for claims incurred but not reported (IBNR). The IBNR claims are estimates of claims that are incurred through the end of the fiscal year but have not yet been reported. These liabilities are based on actuarial valuations.

The District's insurance deductibles and policy limits are as follows:

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES – continued

	Deductibles	Excess Coverage per Occurrence
General and Automobile Claims	$ 1,000	$ 10,000
Property and Fire Claims	1,000	250,000
Earthquake Claims	1,000	75,000
Flood Claims	1,000	75,000
Workers' Compensation Claims	1,000	25,000

The District has not exceeded the claims limitation on its insurance policies for the last five years.

J. Compensated Absences

Depending on years of service and union membership, employees can earn annual vacation leave between 10 days and 22 days per year. Administrators earn 22 days of annual vacation leave. Employees are allowed to carry over twice their maximum yearly earned balances from one fiscal year to another. All outstanding vacation leave is payable upon resignation, retirement, or death. Compensated absences are recognized as liabilities in the District's proprietary fund. Compensated absences are not reported as liabilities in the governmental funds because they have not "matured," meaning they are not yet payable to the employee.

Sick leave accumulates each month without a limit on the total hours that can be accumulated. Accumulated sick leave does not vest and is forfeited at resignation, retirement or death. Sick leave is recorded as an expense/expenditure when leave is taken and no liability is recorded.

K. Receivables and Payables

Receivables expected to be collected within sixty days following year-end are considered measurable and available and are recognized as revenues in the governmental fund financial statements. Other receivables are offset by unearned revenues and, accordingly, have not been recorded as revenue. Receivables, net of any allowance for doubtful accounts, are recorded on the Statement of Net Position/Balance Sheet.

Activities between funds that represent lending/borrowing arrangements outstanding at the end of the fiscal year are referred to as "due to/from other funds" in the fund financial statements, and are eliminated in the government-wide statements.

L. Long-term Obligations

In the government-wide financial statements, long-term debt and other long-term obligations including accrued compensation and claims are reported as liabilities. Bond premiums and discounts are deferred and amortized over the life of the bonds using the straight line method which approximates the effective interest method. Bonds payable are reported net of applicable bond premium or discount. Bond issuance costs are reported as outflows of resources (expenses) in the period incurred.

In the fund financial statements, governmental fund types recognize bond premium and discounts, as well as bond issuance costs as incurred. The face amount of debt issued is reported as other financing sources. Premiums received on debt issuances are reported as other financing sources while discounts on debt issuances are reported as other financing uses. Issuance costs are reported as expenditures.

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES – continued

M. Retirement Plans

Most District employees participate in Oregon's Public Employees Retirement System (OPERS). Contributions are made as required by the plan and are recorded as expense/expenditures. Pension benefits are explained in Note 11.

For purposes of measuring the net pension liability, deferred outflows of resources and deferred inflows of resources related to pensions, and pension expense, information about the fiduciary net position of OPERS and additions to/deductions from OPERS's fiduciary net position have been determined on the same basis as they are reported by OPERS. For this purpose, benefit payments (including refunds of employee contributions) are recognized by OPERS when due and payable in accordance with the benefit terms. OPERS investments are reported at fair value.

The District provides tax-deferred annuity contracts established under Section 403(b) of the Internal Revenue Code. Participation in the program is voluntary. Contributions are made from salary deductions from participating employees within the limits specified in the Code. This plan is accounted for under the provisions of Governmental Accounting Standards Board (GASB) Statement No. 68, *Accounting and Financial Reporting for Pension Plans*.

The District also provides a single-employer defined benefit early retirement program (Note 11-B). The stipend benefit is actuarially determined, is reflected as a long-term liability in the government-wide financial statements, and reflects the present value of expected future payments. This plan is accounted for under the provisions of GASB Statement No. 73.

N. Other Post-Employment Benefits

The District is mandated to contribute to Retirement Health Insurance Accounts (RHIAs) for eligible District employees who are members of OPERS, and were plan members before January 1, 2004. The plan was established by the Oregon Legislature.

The Retirement Health Insurance Subsidy (RHIS) is a health and welfare program the District provides for retirees. The plan is actuarially determined, is reflected as a long-term liability in the government–wide financial statements, and reflects the present value of expected future payments. The net other post-employment benefits liability and expenditure in the governmental fund financial statements are limited to amounts that become due and payable as of the end of the fiscal year, and are reported on the pay-as-you-go basis.

Certificated employees who have met the requirements for age and years of service with the District are eligible for early retirement benefits (Note 11-B), which includes early retirement benefits and other post-employment benefits as explained in Note 12.

Both plans are accounted for under the provisions of GASB Statement No. 75.

O. Net Position

Net position represents the difference between the District's total assets and deferred outflows and total liabilities and deferred inflows. District net position currently has three components:

Net investment in capital assets represents capital assets plus unspent bond proceeds less accumulated depreciation and outstanding principal of capital asset related debt.

Restricted net position represents net position upon which constraints have been placed, either externally by creditors, grantors, contributors or others, or legally constrained by law.

Unrestricted net position represents net position that does not meet the definition of "restricted" or "net investment in capital assets".

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES – continued

P. Deferred Inflows and Outflows of Resources

In addition to assets, the Statement of Net Position reports a separate section for Deferred Outflows of Resources. This separate financial statement element, *Deferred Outflows of Resources*, represents a consumption of net position that applies to a future period and so will not be recognized as an outflow of resources (expense/expenditure) until then.

In addition to liabilities, the Statement of Net Position reports a separate section for Deferred Inflows of Resources. This separate financial statement element, *Deferred Inflows of Resources*, represents an acquisition of net position that applies to a future period and so will not be recognized as an inflow of resources (revenue) until then.

Q. Management Estimates

The preparation of basic financial statements in accordance with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the basic financial statements and reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

R. Fund Balance Definitions

In the governmental financial statements, fund balances are reported in classifications that comprise a hierarchy based primarily on the extent to which the District is bound to honor constraints on the specific purposes for which amounts in those funds can be spent.

Governmental fund balance definitions, from most to least restrictive are:

1. *Non-spendable fund balances* – Amounts that are not in spendable form or due to legal or contractual requirements. Examples of resources in this category are prepaid amounts, inventory or notes receivable.
2. *Restricted fund balances* – Amounts constrained to specific purposes by their providers (such as grantors or bond holders), through constitutional provisions or by enabling legislation. These are primarily amounts subject to externally enforceable legal restrictions.
3. *Committed fund balances* – Amounts constrained to specific purposes by resolution of the District's Board. The District's Board can modify or rescind a commitment at any time through passage of a new resolution. In order to commit fund balances the District must take formal action prior to the close of the fiscal year.
4. *Assigned fund balances* – Amounts the District intends to use for a specific purpose that are neither restricted nor committed are reported as assigned fund balance. Intent can be expressed by the Board or delegated authority to an official. An example of assignment is when the District's Board adopts the annual budget which includes funds identified as reserved for a specific purpose.
5. *Unassigned fund balance* – Amounts not included in other classifications above. The amount represents spendable fund balance that is not restricted, committed or assigned in the General Fund. This classification is also used to report any deficit fund balance amounts in other governmental funds.

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES – continued

R. Fund Balance Definitions - continued

The District's Board has passed resolution number 4461 titled: *Compliance with Governmental Accounting Standards Board Statement No. 54 (GASB 54): Fund Balance Reporting and Governmental Fund Type Definitions*. The resolution reads as follows:

- The Board affirms that it is the highest level decision authority for the District.
- The Board hereby delegates the authority to classify portions of ending fund balance as "Assigned" to the Superintendent.
- The Board adopts GASB 54 definitions for Non-spendable, Restricted, Committed, Assigned and Unassigned fund balances.
- In conjunction with the adoption of GASB 54 fund balance classifications, the Board declares its budgeting practices and budget allocations for restricted and unrestricted fund balance amounts will be consistent with the fund balance classification hierarchy.
- The Board hereby adopts GASB 54 definitions of fund types for the General Fund, special revenue funds, debt services funds, capital projects funds, and permanent funds.

S. Use of Restricted Resources

When an expense is incurred that can be paid using either restricted or unrestricted resources (net position), the District first applies the expense toward restricted resources and then toward unrestricted resources. In governmental funds, the District first applies the expenditure toward restricted fund balance and then to other, less-restrictive classifications, committed and then assigned fund balances, before using unassigned fund balances.

T. Fund Balance Policy

Per District board policy 8.10.025P, updated in June 2019, the Board has established a goal to fund and maintain a reserve in the General Fund that shall range from 5.00 percent to 10.00 percent of annual General Fund revenues. The goals for the reserve will be set as part of the District's long-range financial plan, with an expectation that the District will achieve and sustain a 10.00 percent reserve. The Board shall establish an annual operating contingency each fiscal year during the budget process.

U. Stabilization Arrangements

The District established a PERS Rate Stabilization Reserve Fund by Board Resolutions 2679, adopted on June 16, 2003, and 4471, adopted on June 27, 2011. The purpose of the Fund is to minimize effects of large fluctuations in the PERS rate assessed against District salaries and wages, and to repay the 2002 and 2003 PERS UAL borrowings. This Fund resides within the Special Revenue Fund, and the primary revenue source is 0.11 percent of Current Year Permanent Rate and GAP Property Taxes. Use of the resources must be authorized through formal Board resolution. In any given year, funds may be transferred to the General Fund not to exceed either 1) the increase in PERS rate over rates in effect at June 30, 2011; or 2) the increase in the internally charged PERS UAL fringe rate over the fringe rate in effect at June 30, 2011, multiplied by the PERS eligible budgeted salary base for that year. The ending fund balance in the PERS Rate Stabilization Reserve Fund at June 30, 2021 is $19,056.

NOTE 2 – BUDGETARY BASIS OF ACCOUNTING

The District reports financial position, results of operations, and changes in fund balance / net position on the basis of accounting principles generally accepted in the United States (GAAP). The budgetary statements provided as part of required or other supplementary information are presented on the budgetary basis to provide a meaningful comparison of actual results with the budget.

NOTE 3 – STATE CONSTITUTIONAL PROPERTY TAX LIMITS

The State of Oregon has a constitutional limit on property taxes for schools and non-school government operations. Under the provisions of the limitation, tax revenues are separated into those for the public school system and those for local government operations other than the public school system. Property taxes levied for the payment of bonded indebtedness are exempt from the limitation, provided such bonds are either authorized by a specific provision of the Oregon Constitution or approved by the voters of the District for capital construction or improvements.

The District's tax rates for the year ended June 30, 2021 are as follows:

Permanent rate	$ 5.2781 per $1 thousand of assessed value
Local option rate	$ 1.9900 per $1 thousand of assessed value
GO Bond Levy amount	$ 136,000,000 (unrounded dollars)

NOTE 4 – CASH, CASH EQUIVALENTS AND INVESTMENTS

Deposits with financial institutions include bank demand deposits, deposits in the Local Government Investment Pool, time certificates of deposit and savings account deposits, as authorized by Oregon statutes.

The District categorizes its fair value measurements within the fair value hierarchy established by generally accepted accounting principles. The hierarchy is based on the valuation inputs to measure the fair value of the asset. Level 1 inputs are quoted prices in active markets for identical assets; Level 2 inputs are significant other observable inputs; Level 3 inputs are significant unobservable inputs. At June 30, 2021, the District's cash, cash equivalents, and investments were comprised of the following:

	June 30, 2021	Measurements Using
Oregon Local Government Investment Pool	$ 70,637	N/A
Cash in demand deposits	287,297	N/A
Petty cash	11	N/A
Total cash and cash equivalents	357,945	
Cash and cash equivalents held by fiscal agents	5,121	N/A
U.S. Government agency securities	306,508	Level 1
Commercial Paper	317,051	Level 1
Municipal Bonds	38,876	Level 1
Total investments	662,435	
Total cash, cash equivalents and investments	$ 1,025,501	

NOTE 4 – CASH, CASH EQUIVALENTS AND INVESTMENTS – continued

A. Investments

Accounting principles generally accepted in the United States of America require investments with a remaining maturity of more than one year at the time of purchase to be stated at fair value. Fair value is determined at the quoted market price, if available; otherwise the fair value is estimated based on the amount at which the investment could be exchanged in a current transaction between willing parties, other than in a forced liquidation sale. Investments with maturities of less than one year are carried at amortized cost.

Investments in the Oregon Local Government Investment Pool (LGIP) are stated at share value, which approximates fair value, and is the value at which the shares can be withdrawn. The LGIP does not report all investments at fair value in accordance with the provisions of GASB Statement No. 31. The LGIP is required by Oregon Revised Statutes (ORS) to compute the fair value of all investments maturing more than 270 days from the date the computation is made. If the fair value totals more than one percent of the balance of the LGIP in terms of unrealized gain or loss, the amount is required to be distributed to the pool participants. Fifty percent of the LGIP portfolio must mature within 93 days. Up to twenty-five percent of the LGIP portfolio may mature in over one year and no investment may mature in over three years.

The District requires all securities to be purchased in the District's name and held in third party safekeeping.

The Oregon Local Government Investment Pool is unrated. Other investments held at June 30, 2021 are categorized by Moody's and Standard and Poor's ratings as follows:

Moodys Rating	U.S. Government & Agency Obligations	Corporate Notes	Municipal Bonds	Total
Aaa	$ 253,454	$ 80,498	$ -	$ 333,952
Aa1	-	15,373	7,215	22,588
Aa2	-	52,640	8,821	61,461
Aa3	-	7,740	-	7,740
A1	-	114,924	-	114,924
A2	-	45,876	-	45,876
NR	53,054	-	22,840	75,894
	$ 306,508	$ 317,051	$ 38,876	$ 662,435
Weighted Average Maturity (Yrs)	0.42	0.49	0.33	0.45

S & P Rating	U.S. Government & Agency Obligations	Corporate Notes	Municipal Bonds	Total
AAA	$ -	$ 80,498	$ -	$ 80,498
AA+	253,454	-	-	253,454
AA	-	-	6,934	6,934
AA-	-	25,371	4,929	30,300
A+	-	105,341	-	105,341
A	-	75,293	-	75,293
A-	-	21,036	-	21,036
BBB+	-	9,512	-	9,512
SP-1+	-	-	12,705	12,705
NR	53,054	-	14,308	67,362
	$ 306,508	$ 317,051	$ 38,876	$ 662,435
Weighted Average Maturity (Yrs)	0.42	0.49	0.33	0.45

NOTE 4 – CASH, CASH EQUIVALENTS AND INVESTMENTS – continued
A. Investments – continued

Interest rate risk
In accordance with its investment policy, the District manages its exposure to declines in fair value of its investments by structuring the investment portfolio so that securities mature to meet ongoing operations.

Credit risk
Oregon Revised Statutes authorize school districts to invest in obligations of the U.S. Treasury, agencies and instrumentalities of the United States, commercial paper, bankers' acceptances guaranteed by a qualified financial institution, repurchase agreements, interest bearing bonds of any city, county, port or school district in Oregon, Washington, Idaho, and California (subject to specific standards), and the LGIP, among others. The Board of Education has adopted a policy which complies with state statutes.

Concentration of credit risk-investments
In accordance with GASB 40, the District is required to report all individual non-federal investments which exceed 5.00 percent of total invested funds. As of June 30, 2021 the District held the following individual non-federal assets that exceeded 5.00 percent of total invested funds:

	Value	Percentage of Total Investments
Lloyds Bank	$ 39,972	6.0%
Asian Development Bank	35,756	5.4%
Natixis Bank	34,975	5.3%

Custodial risk-deposits
The District's deposits with financial institutions are insured by the Federal Depository Insurance Corporation (FDIC); interest and non-interest bearing accounts are insured up to $250 thousand. To provide additional security required and authorized by Oregon Revised Statutes, Chapter 295, deposits above insurance limits are covered by collateral held in a multiple financial institution collateral pool administered by the State of Oregon. At June 30, 2021, bank balances of $1,250 were insured by the FDIC. Funds not covered by FDIC insurance are covered by the Oregon State Treasury Collateral Pool. At June 30, 2021, the carrying amount of the District's balance was $287,297 and the bank balance was $291,227.

Custodial credit risk-investments
For an investment, this is the risk that, in the event of a failure of the counterparty, the District will not be able to recover the value of its investments or collateralized securities that are in the possession of an outside party. The District's investment policy limits the types of investments that may be held and does not allow securities to be held by the counterparty.

The LGIP is administered by the Oregon State Treasury with the advice of other state agencies and is not registered with the U.S. Securities and Exchange Commission. The LGIP is an open-ended no-load diversified portfolio offered to any agency, political subdivision, or public corporation of the State that by law is made the custodian of, or has control of any fund. The LGIP is commingled with the State's short-term funds. In seeking to best serve local governments of Oregon, the Oregon Legislature established the Oregon Short Term Fund Board, which has established diversification percentages and specifies the types and maturities of the investments. The purpose of the Board is to advise the Oregon State Treasury in the management and investment of the LGIP. Investments within the LGIP must be invested and managed as a prudent investor would, exercising reasonable care, skill and caution. Professional standards indicate that the investments in external investment pools are subject to custodial risk because they are not evidenced by securities that exist in physical or book entry form. Nevertheless, management does not believe that there is any substantial custodial risk related to LGIP investments.

NOTE 5 – RECEIVABLES

Receivables at June 30, 2021 are summarized as follows:

	General Fund	Special Revenue Fund	Debt Service Fund	Capital Projects Fund	Total
Accounts and other receivables:					
Interest Receivable	$ -	$ 4	$ -	$ 1,123	$ 1,127
Accounts receivable	1,519	6,456	-	2,035	10,010
Federal, state and local grants	-	34,035	-	-	34,035
Total accounts and other receivables	1,519	40,495	-	3,158	45,172
Property and other taxes receivable	10,509	-	3,212	-	13,721
Total receivables	$ 12,028	$ 40,495	$ 3,212	$ 3,158	$ 58,893

NOTE 6 – PREPAID ITEMS

A summary of changes in prepaid items for the year ended June 30, 2021 is as follows:

	Beginning Balance	Additions	Reductions	Ending Balance
Postage	$ 190	$ 165	$ (150)	$ 205
Insurance	5,648	-	(1,478)	4,170
Workers Compensation Prefund	300	-	-	300
Other	62	423	(62)	423
Total Prepaid Assets	$ 6,200	$ 588	$ (1,690)	$ 5,098

Prepaid insurance consists of Owner Controlled Insurance Program (OCIP), which provides liability coverage for major construction contracts, and builders risk insurance for high school rebuilds. The District has two OCIP policies being amortized over five years. OCIP I is being amortized April 2019 to April 2024. OCIP II is being amortized June 2020 to June 2025. The District has one builder's risk policy for Lincoln High School, being amortized over 28 months, April 2020 to July 2022.

The District is self-insured for workers' compensation claims. The Workers Compensation Prefund is an escrow account held by the District's third-party administrator for monthly payment of claims.

NOTE 7 – CAPITAL ASSETS

A summary of changes in capital assets for the year ended June 30, 2021 is as follows:

	Beginning Balance	Additions	Deletions	Transfers	Ending Balance
Capital assets not being depreciated or amortized					
Land	$ 9,174	$ -	$ -	$ -	$ 9,174
Construction in progress	272,766	285,906	(7,040)	(53,127)	498,505
Total capital assets not being depreciated or amortized	281,940	285,906	(7,040)	(53,127)	507,679
Capital assets being depreciated or amortized					
Buildings and site improvements	881,218	-	-	52,564	933,782
Vehicles and equipment	39,376	491	(484)	563	39,946
Total capital assets being depreciated or amortized	920,594	491	(484)	53,127	973,728
Total general capital assets	1,202,534	286,397	(7,524)	-	1,481,407
Less accumulated depreciation and amortization					
Buildings and site improvements	(256,073)	(21,136)	-	-	(277,209)
Vehicles and equipment	(29,089)	(2,173)	435	-	(30,827)
Total accumulated depreciation and amortization	(285,162)	(23,309)	435	-	(308,036)
Total capital assets, net of accumulated depreciation	$ 917,372	$ 263,088	$ (7,089)	$ -	$ 1,173,371

Depreciation expense for governmental activities is charged to functions as follows:

Instruction	$ 20,615
Supporting services	2,514
Enterprise and Community Services	180
	$ 23,309

As of June 30, 2021 the District has one school that was closed and idle: Smith elementary school. As of June 30, 2021 the carrying value of this school is $472 and is included in the capital assets summary above.

NOTE 8 – INTERFUND RECEIVABLES, PAYABLE AND TRANSFERS

Interfund balances represent cash owed by one fund to another. Interfund receivables and payables at June 30, 2021 are as follows:

	Due To	Due From
General Fund	$ 40,975	$ 744
Special Revenue Fund	744	40,975
Capital Projects Fund	-	-
	$ 41,719	$ 41,719

There is a $744 interfund balance between the General Fund and the Special Revenue Fund for monies invested on behalf of Student Body Fund accounts. The Special Revenue Fund was advanced $40,975, by the General Fund to cover unbilled expenditures.

The composition of interfund transfers as of June 30, 2021, is as follows:

	Transfers In	Transfers Out
General Fund	$ -	$ 1,198
Special Revenue Fund	716	651
Debt Service Fund	1,750	-
Capital Projects Fund	-	617
	$ 2,466	$ 2,466

The District's General Fund made debt service transfers totaling $1,133 to the Debt Service Fund for principal and interest payments on the District's Full Faith & Credit obligations. The District's General Fund also made transfers totaling $65 to the Special Revenue Fund to cover write-offs. The District's Special Revenue Fund made transfers of $651 between funds to reclassify Medicaid funding. The Capital Projects Fund made transfers of $617 to the Debt Service Fund for principal and interest payments on the District's Full Faith & Credit and QZAB obligations.

NOTE 9 – ACCRUED COMPENSATED ABSENCES

The General Fund and Special Revenue Fund are the primary funds from which the compensated absences balance liability is liquidated.

The change in the balance of accrued compensated absences for the year was as follows:

Outstanding June 30, 2020	Increases	Payments	Outstanding June 30, 2021	Due Within One Year
$ 5,286	$ 4,742	$ (3,201)	$ 6,826	$ 3,578

NOTE 10 – BONDED AND OTHER DEBT

Changes in District long-term debt during fiscal year 2021 were as follows:

	Original Amount	Beginning Balance	Additions	Matured and Redeemed	Ending Balance	Due Within One Year
Pension debt:						
Limited tax pension bonds						
Series 2002	$ 210,104	$ 142,580	$ -	$ -	$ 142,580	$ 15,900
Series 2003	281,170	179,082	-	(7,503)	171,579	7,673
Series 2012	14,400	14,400	-	(14,400)	-	-
Total pension debt (See Note 11)	505,674	336,062	-	(21,903)	314,159	23,573
Other Debt:						
Recovery Zone Economic Development Bonds	11,000	2,761	-	(1,061)	1,700	1,093
General Obligation Bonds Series 2013B	68,575	59,020	-	(52,995)	6,025	2,865
General Obligation Bonds Series 2015B	244,700	152,400	-	(36,255)	116,145	5,735
QZAB Series 2016	4,000	3,400	-	(200)	3,200	200
Full Faith and Credit Obligations Series 2016	5,048	4,213	-	(295)	3,918	305
General Obligation Bonds Series 2017B	241,890	179,665	-	(1,970)	177,695	2,315
General Obligation Bonds Series 2020	441,320	441,320	-	(54,930)	386,390	41,625
General Obligation Bonds Series 2020B	365,465	-	365,465	-	365,465	40,240
General Obligation Bonds Series 2020C	53,965	-	53,965	(560)	53,405	885
Total other debt	1,435,963	842,779	419,430	(148,266)	1,113,943	95,263
Total long-term debt	$1,941,637	1,178,841	419,430	(170,169)	1,428,102	118,836
Unamortized bond premium (discount)		105,909	31,205	(11,483)	125,631	7,765
Total long-term debt, net of premiums (discounts)		$ 1,284,750	$450,635	$(181,652)	$1,553,733	$126,601

Changes in District accrued interest during fiscal year 2021 were as follows:

Accrued Interest:	Beginning Balance	Additions	Payments and Reductions	Ending Balance
Current Portion	$ 20,486	$ 74,021	$ (71,455)	$ 23,052
Long Term Portion	28,713	-	(13,079)	15,634
Total Accrued Interest	$ 49,199	$ 74,021	$ (84,534)	$ 38,686

NOTE 10 – BONDED AND OTHER DEBT – continued

A. Limited Tax Pension Bonds

In October 2002 Portland Public Schools participated as one of forty-one Oregon school districts and education service districts in issuing limited tax pension bonds. The proceeds were used to finance a portion of the estimated unfunded actuarial liability of each participating school district with the Oregon Public Employees Retirement System ("OPERS"). The Oregon School Boards Association ("OSBA") sponsored this pooled limited tax pension bond program. The OSBA does not have a financial obligation in connection with the bonds issued under the program. Except for the payment of its pension bond payments and additional charges when due, each participating school district has no obligation or liability to any other participating school district's pension bonds or liabilities to OPERS. In April 2003, OSBA sponsored another pooled limited tax pension bond program with thirty school districts and education service districts. Payments of yearly principal and interest are recorded as financial statement expenditures in instruction and in support services. The District anticipates the total costs of financing the District's actuarial obligation in this manner will result in a significant savings to the District when compared to paying for such costs as additional contribution rates to OPERS.

The District issued $210,104 Limited Tax Pension Bonds, Series 2002 (Federally Taxable), of which $53,524 are Series 2002A (deferred interest bonds) and $156,580 are Series 2002B (current interest bonds). The 2002 series Limited Tax Pension Bonds were issued on October 31, 2002, and are payable annually through June 2028. Interest on the deferred interest bonds is accreted semiannually at a yield of 6.10 percent. Interest on the current coupon bonds is payable semiannually at rates ranging from 5.48 to 5.55 percent. The Series 2002A Bonds are not subject to optional prepayment prior to maturity. The Series 2002B Bonds maturing June 30, 2021, shall be subject to prepayment from pension prepayments on or after June 30, 2009, and those due June 30, 2028 are subject to mandatory prepayment prior to its stated maturity, in whole or part, on any June 30 on or after June 30, 2024. During 2012 $14,200 of Series 2002 Pension Bonds were refinanced. See the description of the Limited Tax Pension Bonds, Series 2012 below.

The District issued $281,170 Limited Tax Pension Bonds, Series 2003 (Federally Taxable), of which $124,800 are Series 2003A (deferred interest bonds) and $156,370 are Series 2003B (current interest bonds). The Series 2003 series Limited Tax Pensions Bonds were issued on April 30, 2003, and are payable annually through June 2028. Interest on the deferred interest bonds is accreted payable semiannually at yields rates ranging from 5.45 to 6.27 percent. Interest on the current coupon bonds is payable semiannually at rates ranging from 5.45 to 6.27 percent. The bonds are federally taxable and are not subject to optional prepayment prior to their stated maturities.

On January 31, 2012 the District issued $14,400 in Limited Tax Pension Refunding Bonds, Series 2012. The interest rate was fixed at 2.75 percent and interest payments on the bonds were payable semiannually in June and December. The bonds matured on June 30, 2021. The total amount of interest savings (economic gain) as a result of the refinancing was $3,200 dollars. The bond proceeds, $14,200, were used to pay on the Limited Tax Pension Bonds, Series 2002. Under the terms of the borrowing agreements for the 2002, 2003 and 2012 Limited Tax Pension Bonds, the District is bound by an intercept agreement whereby Wells Fargo Bank Northwest NA, as the trustee, directly receives specified amounts that have been withheld from the District's State School Fund support payments that are deposited in trust with LGIP. Wells Fargo Bank Northwest NA then makes the scheduled semi-annual debt service payments from the LGIP trust account.

NOTE 10 – BONDED AND OTHER DEBT – continued

B. General Obligation Bonds

As part of a $482 million capital bond measure passed by District voters in 2012, the District issued the following General Obligation debt to finance school renovation and replacement:

On May 1, 2013 the District issued $68,575 in General Obligation Bonds, Series 2013B. The interest rate is fixed at rates ranging from 3.50 to 5.00 percent. Interest payments on the bonds are payable semiannually in June and December, beginning December 15, 2013. The bonds mature on June 15, 2033 with principal payments due annually on June 15. The bonds were issued at a premium of $7,923 which is being amortized over the life of the bonds.

On April 30, 2015 the District issued $244,700 in General Obligation Bonds, Series 2015B. The interest rate is fixed at rates ranging from 3.00 to 5.00 percent. Interest payments on the bonds are payable semiannually in June and December, beginning December 15, 2015. The Series 2015B Bonds maturing on or after 2026 are subject to redemption, at the option of the District, in whole or part, on or after June 15, 2025. The bonds mature on June 15, 2033 with principal payments due annually on June 15. The bonds were issued at a premium of $33,178 which is being amortized over the life of the bonds.

On August 10, 2017 the District issued $62,160 in General Obligation Bonds, Series 2017B. The interest rate is fixed at 5.00 percent. Interest payments on the bonds are payable semiannually in June and December, beginning December 15, 2017. The Series 2017B Bonds are not subject to early redemption prior to maturity. The bonds mature on June 15, 2030, with principal payments due annually on June 15. The bonds were issued at a premium of $9,854 which is being amortized over the life of the bonds.

On December 30, 2020 the District issued $53,965 in General Obligation Advance Refunding Bonds, Series 2020C. The bond proceeds were deposited into an escrow account, invested in State and Local Government Securities, and will be used to retire $50,410 of General Obligation Bonds, Series 2013B at the maturity date of June 30, 2023. The interest rate is fixed at rates ranging from 1.05 to 2.00 percent. Interest payments on the bonds are payable semiannually in June and December, beginning June 15, 2021. As a result of the advance refunding, debt service has been reduced by $6,200, with a Net Present Value savings of $5,454. The Series 2020C Bonds maturing on June 15, 2031 and on any date thereafter are subject to redemption at the option of the District prior to their stated maturity dates at any time on or after June 15, 2030 in whole or in part; and, if in part, with maturities to be selected by the District at a price of par plus accrued interest, if any, to the date of redemption. The bonds mature on June 15, 2033 with principal payments due annually on June 15. The bonds were issued at a premium of $1,631 which is being amortized over the life of the bonds.

As part of a $790 million capital bond measure passed by District voters in 2017, the District has issued the following General Obligation debt to finance school renovation and replacement:

On August 10, 2017, the District issued $168,950 in General Obligation Bonds, Series 2017A. The interest rate was fixed at 1.65 percent. Interest payments on the bonds were payable semiannually in June and December, beginning December 15, 2017. The bonds matured on June 15, 2020. The bonds were issued at a premium of $155 which was being amortized over the life of the bonds. On August 10, 2017 the District issued $179,730 in General Obligation Bonds, Series 2017B. The interest rate is fixed at rates ranging from 3.00 to 5.00 percent. Interest payments on the bonds are payable semiannually in June and December, beginning December 15, 2017. The Series 2017B Bonds maturing on June 15, 2028 and on any date thereafter are subject to redemption at the option of the District prior to their stated maturity dates at any time on or after June 15, 2027 in whole or in part; and, if in part, with maturities to be selected by the District at a price of par plus accrued interest, if any, to the date of redemption. The bonds mature on June 15, 2044 with principal payments due annually on June 15. The bonds were issued at a premium of $1,051 which is being amortized over the life of the bonds.

NOTE 10 – BONDED AND OTHER DEBT – continued

On April 14, 2020 the District issued $441,320 in General Obligation Bonds, Series 2020. The interest rate is fixed at rates ranging from 3.00 to 5.00 percent. Interest payments on the bonds are payable semiannually in June and December, beginning December 15, 2020. The Series 2020 Bonds maturing on June 15, 2031 and on any date thereafter are subject to redemption at the option of the District prior to their stated maturity dates at any time on or after June 15, 2030 in whole or in part; and, if in part, with maturities to be selected by the District at a price of par plus accrued interest, if any, to the date of redemption. The bonds mature on June 15, 2037 with principal payments due annually on June 15. The bonds were issued at a premium of $68,202 which is being amortized over the life of the bonds.

As part of a $1,208 million capital bond measure passed by District voters in 2020, the District has issued the following General Obligation debt to finance school renovation and replacement:

On December 30, 2020 the District issued $365,465 in General Obligation Bonds, Series 2020B. The interest rate is fixed at rates ranging from 1.50 to 5.00 percent. Interest payments on the bonds are payable semiannually in June and December, beginning December 15, 2021. The Series 2020B Bonds maturing on June 15, 2031 and on any date thereafter are subject to redemption at the option of the District prior to their stated maturity dates at any time on or after June 15, 2030 in whole or in part; and, if in part, with maturities to be selected by the District at a price of par plus accrued interest, if any, to the date of redemption. The bonds mature on June 15, 2046 with principal payments due annually on June 15. The bonds were issued at a premium of $29,574 which is being amortized over the life of the bonds.

Pursuant to the American Recovery and Reinvestment Act of 2009 (ARRA), the City of Portland was awarded $13,500 in Recovery Zone Economic Development Bonds (RZEDBs). In July 2010, the City sub-awarded $11,000 of the RZED bonds to Portland Public Schools, which are being used to complete energy and water conservation projects that will financially benefit the District in reduced energy and water costs and will yield on-going financial benefit once the bonds are paid off. The District makes semi-annual interest payments and annual principal payments, and the bonds will mature in December 2022. The bond's interest payments of 5.05 percent are 42.2 percent federally subsidized.

On August 4, 2016 the District issued $4,000 in Qualified Zone Academy Bonds (QZAB), Series 2016. The District pays no interest rate over the 20 year term of the bonds. The bonds carry a 4.39 percent interest rate for structuring purposes, but the purchaser of the bonds receives a Federal tax credit in lieu of interest earnings. The bonds mature on August 4, 2036 with level principal payments due annually on August 4.

On November 9, 2016 the District issued $5,048 in Full Faith and Credit Obligations, Series 2016. The interest rate is fixed at 2.99 percent. Interest payments on the obligations are payable semiannually in June and December, beginning June 1, 2018. The obligations mature on December 1, 2031, with principal payments due annually on December 1. The obligations carry a prepayment option such that any or all outstanding maturities may be redeemed on or after December 1, 2018. The bonds were issued at par.

NOTE 10 – BONDED AND OTHER DEBT - continued

Article XI-K of the Oregon Constitution allows the state to guarantee the general obligation bonded indebtedness of school districts. For the Series 2013B, 2015B, 2017A and 2017B GO Bonds mentioned immediately above, the District participated in the Oregon School Bond Guaranty program (ORS 328.321 to 328.356), whereby the State of Oregon (State) guarantees all principal and interest payments until maturity will be made to bondholders when due. Should the District fail to make a payment of debt service on these bonds when due, the State will make the payment on behalf of the District, and then will seek recovery from the District. The State may recover funds by means of intercepting any source of operating moneys normally remitted from the State to the District. Since the inception of the bonds, the District has not used the guarantee, and there are no outstanding amounts due to the State of Oregon as of June 30, 2020.

Federal arbitrage restrictions apply to substantially all debt. Any liabilities to the federal government are accrued and paid when due. Long-term debt payments are made from the debt service funds.

Future annual debt service requirements for the District are as follows:

Fiscal year	Limited tax pension bonds	Recovery zone bonds	Other full faith & credit	General Obligation Bonds	QZAB	Total
Principal						
2022	$ 23,573	$ 1,093	$ 305	$ 93,665	$ 200	$ 118,836
2023	25,481	607	315	107,970	200	134,573
2024	48,820	-	325	54,465	200	103,810
2025	54,100	-	335	59,445	200	114,080
2026	61,345	-	345	42,860	200	104,750
2027-2031	100,840	-	1,885	236,550	1,000	340,275
2032-2036	-	-	408	203,720	1,000	205,128
2037-2041	-	-	-	154,670	200	154,870
2042-2046	-	-	-	151,780	-	151,780
Total principal	314,159	1,700	3,918	1,105,125	3,200	1,428,102
Interest						
2022	34,125	72	113	47,161	-	81,471
2023	34,561	15	103	37,083	-	71,762
2024	14,897	-	94	31,711	-	46,702
2025	12,170	-	84	29,110	-	41,364
2026	9,126	-	74	26,267	-	35,467
2027-2031	7,547	-	205	99,773	-	107,525
2032-2036	-	-	5	57,193	-	57,198
2037-2041	-	-	-	30,783	-	30,783
2042-2046	-	-	-	9,945	-	9,945
Total interest	112,426	87	678	369,026	-	482,217
Total debt service	$ 426,585	$ 1,787	$ 4,596	$ 1,474,151	$ 3,200	$ 1,910,319

NOTE 11 – PENSION PLANS

Pension Plans - Summary

The District offers a cost-sharing multiple-employer defined benefit plan through the Oregon Public Employees Retirement System (OPERS) and a single-employer defined benefit early retirement stipend (Stipend). The breakdown of the net pension liability, deferred outflows of resources and deferred inflows of resources related to pensions are:

	OPERS	Stipend	Net
Total Pension Liability	$ (521,329)	$ (6,090)	$ (527,419)
Total Pension Expense	$ 112,745	$ (249)	$ 112,496
Pension Deferred Outflows of Resources	$ 229,469	$ 1,119	$ 230,588
Pension Deferred Inflows of Resources	$ (96,347)	$ (73)	$ (96,420)

A. Oregon Public Employees Retirement System (OPERS)

General Information about the Pension Plan

Name of the pension plan: The Oregon Public Employees Retirement System (OPERS) is a cost-sharing multiple-employer defined benefit plan, administered by the Public Employees Retirement Board with authority granted by the Oregon Legislature.

Plan description. Employees of the District are provided with pensions through OPERS. The General Fund and the Special Revenue Fund are the primary funds from which the pension liability is liquidated. All the benefits of OPERS are established by the Oregon legislature pursuant to Oregon Revised Statute (ORS) Chapters 238 and 238A, and Internal Revenue Code Section 401(a). The ORS Chapter 238 Defined Benefit Pension Plan is closed to new members hired on or after August 29, 2003. OPERS issues a publicly available financial report that can be obtained at:

https://www.oregon.gov/pers/Pages/Financials/Actuarial-Financial-Information.aspx.

Benefits provided under Chapter 238 - Tier One / Tier Two Retirement Benefit Plan

1. *Pension Benefits.* The OPERS retirement allowance is payable monthly for life. Members may select from 13 retirement benefit options that are actuarially equivalent to the base benefit. These options include survivorship benefits and lump-sum refunds. The basic benefit is based on years of service and final average salary. A percentage (2.00 percent for Police and Fire employees, 1.67 percent for General Service employees) is multiplied by the number of years of service and the final average salary. Benefits may also be calculated either under a formula plus annuity (for members who were contributing before August 21, 1981) or a money match computation if a greater benefit results.

   A member is considered vested and will be eligible at minimum retirement age for a service retirement allowance if he or she has had a contribution in each of five calendar years or has reached at least 50 years of age before ceasing employment with a participating employer (age 45 for Police and Fire members). General Service employees may retire after reaching age 55. Police and Fire members are eligible after reaching age 50. Tier One general service employee benefits are reduced if retirement occurs prior to age 58 with fewer than 30 years of service. Police and Fire member benefits are reduced if retirement occurs prior to age 55 with fewer than 25 years of service. Tier Two members are eligible for full benefits at age 60. The ORS Chapter 238 Defined Benefit Pension Plan is closed to new members hired on or after August 29, 2003.

NOTE 11 – PENSION PLANS – continued

A. Oregon Public Employees Retirement System (OPERS) – continued

Benefits provided under Chapter 238 - Tier One / Tier Two – continued

2. *Death Benefits.* Upon the death of a non-retired member, the beneficiary receives a lump-sum refund of the member's account balance (accumulated contributions and interest). In addition, the beneficiary will receive a lump-sum payment from employer funds equal to the account balance, provided one or more of the following conditions are met:
   - the member was employed by an OPERS employer at the time of death,
   - the member died within 120 days after termination of OPERS-covered employment,
   - the member died as a result of injury sustained while employed in an OPERS-covered job, or
   - the member was on an official leave of absence from an OPERS-covered job at the time of death.

3. *Disability Benefits.* A member with 10 or more years of creditable service who becomes disabled from other than duty-connected causes may receive a non-duty disability benefit. A disability resulting from a job-incurred injury or illness qualifies a member (including OPERS judge members) for disability benefits regardless of the length of OPERS-covered service. Upon qualifying for either a non-duty or duty disability, service time is computed to age 58 (55 for Police and Fire members) when determining the monthly benefit.

4. *Benefit Changes after Retirement.* Members may choose to continue participation in a variable equities investment account after retiring and may experience annual benefit fluctuations due to changes in the fair value of the underlying equity investments of that account.

Under ORS 238.360 monthly benefits are adjusted annually through cost-of-living changes (COLA). The COLA is capped at 2.00 percent.

Benefits provided under Chapter 238A - Oregon Public Service Retirement Plan (OPSRP).

1. *Pension Benefits.* The ORS 238A Defined Benefit Pension Program provides benefits to members hired on or after August 29, 2003.

   This portion of the OPSRP provides a life pension funded by employer contributions. Benefits are calculated with the following formula for members who attain normal retirement age:

   General Service: 1.50 percent is multiplied by the number of years of service and the final average salary. Normal retirement age for General Service members is age 65, or age 58 with 30 years of retirement credit.

   A member of the OPSRP pension program becomes vested on the earliest of the following dates: the date the member completes 600 hours of service in each of five calendar years, the date the member reaches normal retirement age, and, if the pension program is terminated, the date on which termination becomes effective.

2. *Death Benefits.* Upon the death of a non-retired member, the spouse or other person who is constitutionally required to be treated in the same manner as the spouse receives for life 50 percent of the pension that would otherwise have been paid to the deceased member.

NOTE 11 – PENSION PLANS – continued

A. Oregon Public Employees Retirement System (OPERS) – continued

Benefits provided under Chapter 238A – Oregon Public Service Retirement Plan (OPSRP) – continued

3. *Disability Benefits.* A member who has accrued 10 or more years of retirement credits before the member becomes disabled or a member who becomes disabled due to job-related injury shall receive a disability benefit of 45 percent of the member's salary determined as of the last full month of employment before the disability occurred.

4. *Benefit Changes after Retirement.* Under ORS 238A.210 monthly benefits are adjusted annually through cost-of-living changes. The cap on the COLA vary based on the amount of the annual benefit.

Contributions:

OPERS funding policy provides for monthly employer contributions at actuarially determined rates. These contributions, expressed as a percentage of covered payroll, are intended to accumulate sufficient assets to pay benefits when due. This funding policy applies to the OPERS Defined Benefit Plan and the Other Postemployment Benefit Plans.

Employer contribution rates during the period were based on the December 31, 2017 actuarial valuation. The rates based on a percentage of payroll, first became effective July 1, 2019. The state of Oregon and certain schools, community colleges, and political subdivisions have made unfunded actuarial liability payments to establish side accounts, and their rates have been reduced.

The District's rates in effect for the fiscal year ended June 30, 2021 were:

Tier One / Tier Two	8.75%
OPSRP General Service	3.36%

The District contributed approximately $17.7 million for the year ended June 30, 2021.

Actuarial Valuations:

The employer contribution rates effective July 1, 2020 through June 30, 2021, were set using the entry age normal actuarial cost method. For the Tier One / Tier Two component of the OPERS Defined Benefit Plan, this method produced an employer contribution rate consisting of (1) an amount for normal cost (the estimated amount necessary to finance benefits earned by the employees during the current service year), and (2) an amount for the amortization of unfunded actuarial accrued liabilities, which are being amortized over a fixed period with new unfunded actuarial accrued liabilities being amortized over 20 years.

For the OPSRP Pension Program component of the OPERS Defined Benefit Plan, this method produced an employer contribution rate consisting of (a) an amount for normal cost (the estimated amount necessary to finance benefits earned by the employees during the current service year), (b) an actuarially determined amount for funding a disability benefit component and (c) an amount for the amortization of unfunded actuarial accrued liabilities, which are being amortized over a fixed period with new unfunded actuarial accrued liabilities being amortized over 16 years.

NOTE 11 – PENSION PLANS – continued
A. Oregon Public Employees Retirement System (OPERS) – continued
Actuarial Valuations - continued

Actuarial Methods and Assumptions:

Valuation Date	December 31, 2018
Measurement Date	June 30, 2020
Experience Study	2018, published July 24, 2019
Actuarial Assumptions:	
Actuarial cost method	Entry Age Normal
Inflation rate	2.50 percent
Long-term expected rate of return	7.20 percent
Discount rate	7.20 percent
Projected salary increases	3.50 percent
COLA	Blend of 2.00% COLA and graded COLA (1.25%/0.15%) in accordance with *Moro* decision; blend based on service
Mortality	***Healthy retirees and beneficiaries:*** Pub-2010 Healthy Retiree, sex distinct, generational with Unisex, Social Security Data Scale, with job category adjustments and set-backs as described in the valuation ***Active members:*** Pub-2010 Employee, sex distinct, generational with Unisex, Social Security Data Scale, with job category adjustments and set-backs as described in the valuation ***Disabled retirees:*** Pub-2010 Disable Retiree sex distinct, generational with Unisex, Social Security Data Scale, with job category adjustments and set-backs as described in the valuation

Source: OPERS Comprehensive Annual Financial Report, For the Fiscal Year Ended June 30, 2020

Actuarial valuations of an ongoing plan involve estimates of the value of projected benefits and assumptions about the probability of events far into the future. Actuarially determined amounts are subject to continual revision as actual results are compared to past expectations and new estimates are made about the future. Experience studies are performed as of December 31 of even numbered years. The methods and assumptions shown above are based on the 2018 Experience Study.

Discount Rate:

The discount rate used to measure the total pension liability was 7.20 percent for the Defined Benefit Pension Plan. The projection of cash flows used to determine the discount rate assumed that contributions from plan members and those of the contributing employers are made at the contractually required rates, as actuarially determined. Based on those assumptions, the pension plan's fiduciary net position was projected to be available to make all projected future benefit payments of current plan members. Therefore, the long-term expected rate of return on pension plan investments for the Defined Benefit Pension Plan was applied to all periods of projected benefit payments to determine the total pension liability.

NOTE 11 – PENSION PLANS – continued
A. Oregon Public Employees Retirement System (OPERS) – continued
Actuarial Valuations - continued

Depletion Date Projection:

GASB 67 generally requires that a blended discount rate be used to measure the Total Pension Liability (the Actuarial Accrued Liability calculated using the Individual Entry Age Normal Cost Method). The long-term expected return on plan investments may be used to discount liabilities to the extent that the plan's Fiduciary Net Position (fair value of assets) is projected to cover benefit payments and administrative expenses. A 20-year high quality (AA/Aa or higher) municipal bond rate must be used for periods where the Fiduciary Net Position is not projected to cover benefit payments and administrative expenses. Determining the discount rate under GASB 67 will often require that the actuary perform complex projections of future benefit payments and asset values. GASB 67 (paragraph 43) does allow for alternative evaluations of projected solvency, if such evaluation can reliably be made. GASB does not contemplate a specific method for making an alternative evaluation of sufficiency; it is left to professional judgment.

The following circumstances justify an alternative evaluation of sufficiency for OPERS:

- OPERS has a formal written policy to calculate an Actuarially Determined Contribution (ADC), which is articulated in the actuarial valuation report.
- The ADC is based on a closed, layered amortization period, which means that payment of the full ADC each year will bring the plan to a 100% funded position by the end of the amortization period if future experience follows assumption.
- GASB 67 specifies that the projections regarding future solvency assume that plan assets earn the assumed rate of return and there are no future changes in the plan provisions or actuarial methods and assumptions, which means that the projections would not reflect any adverse future experience which might impact the plan's funded position.

Based on these circumstances, it is OPERS' independent actuary's opinion that the detailed depletion date projections outlined in GASB 67 would clearly indicate that the Fiduciary Net Position is always projected to be sufficient to cover benefit payments and administrative expenses.

Assumed Asset Allocation:

Asset Class/Strategy	Low Range	High Range	OIC Target Allocation
Debt Securities	15.0 %	25.0 %	20.0 %
Public Equity	27.5	37.5	32.5
Real Estate	9.5	15.5	12.5
Private Equity	14.0	21.0	17.5
Alternatives Portfolio	7.5	17.5	15.0
Opportunity Portfolio	0.0	3.0	0.0
Risk Parity	0.0	2.5	2.5
Total			100.0 %

Source: OPERS Comprehensive Annual Financial Report, For the Fiscal Year Ended June 30, 2020

NOTE 11 – PENSION PLANS – continued
A. Oregon Public Employees Retirement System (OPERS) – continued
Actuarial Valuations - continued

Long-Term Expected Rate of Return:

To develop an analytical basis for the selection of the long-term expected rate of return assumption, in May 2019 the OPERS Board reviewed long-term assumptions developed by both Milliman's capital market assumptions team and the Oregon Investment Council's (OIC) investment advisors. The table below shows Milliman's assumptions for each of the asset classes in which the plan was invested at that time based on the OIC long-term target asset allocation. The OIC's description of each asset class was used to map the target allocation to the asset classes shown below. Each asset class assumption is based on a consistent set of underlying assumptions, and includes adjustment for the inflation assumption. These assumptions are not based on historical returns, but instead are based on a forward-looking capital market economic model.

Asset Class	Target Allocation	20-Year Annualized Geometric Mean
Core Fixed Income	9.60 %	4.07 %
Short-Term Bonds	9.60	3.68
Bank/Leveraged Loans	3.60	5.19
High Yield Bonds	1.20	5.74
Large/Mid Cap US Equities	16.17	6.30
Small Cap US Equities	1.35	6.68
Micro Cap US Equities	1.35	6.79
Developed Foreign Equities	13.48	6.91
Emerging Market Equities	4.24	7.69
Non-US Small Cap Equities	1.93	7.25
Private Equity	17.50	8.33
Real Estate (Property)	10.00	5.55
Real Estate (REITS)	2.50	6.69
Hedge Fund of Funds - Diversified	1.50	4.06
Hedge Fund - Event-driven	0.38	5.59
Timber	1.13	5.61
Farmland	1.13	6.12
Infrastructure	2.25	6.67
Commodities	1.13	3.79
Assumed Inflation – Mean		2.50 %

Source: OPERS Comprehensive Annual Financial Report, For the Fiscal Year Ended June 30, 2020

NOTE 11 – PENSION PLANS – continued
A. Oregon Public Employees Retirement System (OPERS) – continued
Actuarial Valuations - continued

Sensitivity of the District's proportionate share of the net pension liability to changes in the discount rate:

The following presents the District's proportionate share of the net pension liability calculated using the discount rate of 7.20 percent, as well as what the District's proportionate share of the net pension liability would be if it were calculated using a discount rate that is one percentage point lower (6.20 percent) or one percentage point higher (8.20 percent) than the current rate:

	1% Decrease (6.20%)	Discount Rate (7.20%)	1% Increase (8.20%)
Proportionate share of the net pension liability	$774,130	$521,329	$309,343

Pension plan fiduciary net position:

Detailed information about the pension plan's fiduciary net position is available in the separately issued OPERS financial report available at: http://www.oregon.gov/pers/Pages/Financials/Actuarial-Financial-Information.aspx

Pension Liabilities, Pension Expense, and Deferred Outflows of Resources and Deferred Inflows of Resources Related to Pensions:

At June 30, 2021, the District reported a liability of $531,329 for its proportionate share of the net pension liability. The net pension liability was measured as of June 30, 2020, and the total pension liability used to calculate the net pension liability was determined by an actuarial valuation as of December 31, 2018. The District's proportion of the net pension liability was based on the District's projected long-term contribution effort as compared to the total projected long-term contribution effort of all employers. At June 30, 2021, the District's proportion was 2.39 percent, which is an increase of 0.62 from the District's proportion of 1.77 percent for the year ended June 30, 2020.

For the year ended June 30, 2021, the District recognized pension expense of $112.7 million for the defined benefit portion of the pension plan. At June 30, 2021, the District reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

	Deferred Outflow of Resources	Deferred Inflow of Resources	Net
Pension changes in employer proportion	$ 99,561	$ (37,415)	$ 62,146
Pension differences between employer contribution and proportionate share of contributions	-	(57,952)	(57,952)
Pension differences between expected and actual experience	22,945	-	22,945
Pension differences due to changes in assumptions	27,978	(980)	26,998
Pension differences between expected and actual earnings	61,301	-	61,301
Total (prior to post-measurement date contributions)	211,785	(96,347)	115,438
Pension contributions subsequent to measurement date	17,684	-	17,684
Net Deferred Outflow/(Inflow) of Resources	$ 229,469	$ (96,347)	$ 133,122

Source: OPERS Schedule of Pension Amounts under GASB 68, June 30, 2020

NOTE 11 – PENSION PLANS – continued
A. Oregon Public Employees Retirement System (OPERS) – continued
Actuarial Valuations - continued

The deferred outflow of resources of $17.7 million resulting from District contributions subsequent to the measurement date will be recognized as a reduction of the net pension liability in the year ended June 30, 2022. Other amounts reported as deferred outflows of resources and deferred inflows of resources related to pensions will be recognized in pension expense as follows:

Employer subsequent fiscal years		Deferred Outflow/(Inflow) of Resources (prior to post-measurement date contributions)
Fiscal Year 2022	$	28,435
Fiscal Year 2023		28,091
Fiscal Year 2024		25,550
Fiscal Year 2025		29,544
Fiscal Year 2026		3,818
Total	$	115,438

Source: OPERS Schedule of Pension Amounts under GASB 68, June 30, 2020

Defined Contribution Plan

OPSRP Individual Account Program (OPSRP IAP)

Plan Description:

Employees of the District are provided with pensions through OPERS. All the benefits of OPERS are established by the Oregon legislature pursuant to Oregon Revised Statute (ORS) Chapters 238 and 238A. Chapter 238 Defined Benefit Pension Plan is closed to new members hired on or after August 29, 2003. Chapter 238A created the Oregon Public Service Retirement Plan (OPSRP), which consists of the Defined Benefit Pension Program and the Individual Account Program (IAP). Beginning January 1, 2004, OPERS active Tier One and Tier Two members became members of the IAP of OPSRP. OPERS members retain their existing defined benefit plan accounts, but member contributions are deposited into the member's IAP account. OPSRP is a part of OPERS and is administered by the OPERS Board.

NOTE 11 – PENSION PLANS – continued
A. Oregon Public Employees Retirement System (OPERS) – continued
Defined Contribution Plan- continued

Pension Benefits:

Participants in OPERS defined benefit pension plans also participate in their defined contribution plan. An IAP member becomes vested on the date the employee account is established or on the date the rollover account was established. If the employer makes optional employer contributions for a member, the member becomes vested on the earliest of the following dates: the date the member completes 600 hours of service in each of five calendar years, the date the member reaches normal retirement age, the date the IAP is terminated, the date the active member becomes disabled, or the date the active member dies.

Upon retirement, a member of the OPSRP IAP may receive the amounts in his or her employee account, rollover account, and vested employer account as a lump-sum payment or in equal installments over a 5-, 10-, 15-, 20-year period or an anticipated life span option. Installment amounts vary with market returns as the account remains invested while in distribution. When chosen, the distribution option must result in a $200 minimum distribution amount, or the frequency of the installments will be adjusted to reach that minimum.

Death Benefits:

Upon the death of a non-retired member, the beneficiary receives in a lump sum the member's account balance, rollover account balance, and vested employer optional contribution account balance. If a retired member dies before the installment payments are completed, the beneficiary may receive the remaining installment payments or choose a lump-sum payment.

Contributions:

Employees of the District contribute 6.0 percent of their covered payroll. The District did not make any optional contributions to member IAP accounts for the year ended June 30, 2021. Included in accrued liabilities at June 30, 2021 are $2.1 million for employee contributions owed to the plan.

B. District Plan - Stipend

Plan Description

The District provides a single-employer defined benefit early retirement program for members of the Portland Association of Teachers (PAT), physical therapists, occupational therapists and licensed administrators. Certificated employees with 15 consecutive years of at least half time service with the District, and who are eligible to retire under OPERS, and who retired before age 62 are eligible for the early retirement benefits. Eligible employees are entitled to a monthly benefit of $425 dollars commencing on the first month after the retirement. Benefits are payable up to the earlier of attaining age 62 or receiving 60 monthly payments. The General Fund and the Special Revenue Fund are the primary funds from which the stipend liability is liquidated. The District does not issue a separate stand-alone financial report for this plan. The District pays for the benefits without any cost to employees. The contributions are financed on a pay-as-you-go basis, and there are no assets accumulated in a trust. The program was established under separate bargaining agreements and may be amended by the District under new collective bargaining agreements.

Total Stipend Liability

The District's total stipend liability of $6.1 million was measured as of June 30, 2020, rolled forward to June 30, 2021, and was determined by an actuarial valuation as of July 1, 2020.

NOTE 11 – PENSION PLANS – continued
B. District Plan - Stipend – continued

Actuarial Assumptions and Other Inputs

The total Stipend liability in the June 30, 2021 actuarial valuation was determined using the following actuarial assumptions and other inputs, applied to all periods included in the measurement, unless otherwise specified:

Valuation Date	July 1, 2020
Measurement Date	June 30, 2020
Inflation	2.50%
Projected salary growth	3.50%
Discount rate	2.21%
Withdrawal, retirement, and mortality rates	December 31, 2018 Oregon PERS valuation
Lapse rates	5% annual lapse rate
Actuarial cost method	Entry Age Normal Level Percent of Pay
Demographic Assumptions	
Mortality	Pub-2010 sex-distinct base tables, as specified below. **Male retiree:** Teachers, no set back **Male spouse:** General Employees, set back 12 months **Female retiree:** Teachers, no set back **Female spouse:** General Employees, no set back
Withdrawal	Based on Oregon PERS assumptions. Annual rates are based on gender and duration from hire date.
Retirement	Based on Oregon PERS assumption. Annual rates are based on age, Tier/OPSRP, and duration of service

Discount Rate – Under GASB 75, unfunded plans must use a discount rate that reflects a 20-year tax-exempt municipal bond yield or index rate. The discount rate in effect for the June 30, 2021 reporting date is 2.21 percent, reflecting the Bond Buyer 20-Year General Obligation Bond Index.

Changes in the Total Stipend Liability

	Total Stipend Liability
Balance at 6/30/2020	$ 6,209
Changes for the year:	
Service cost	207
Interest	209
Effect of plan changes	264
Effect of economic/demographic gains or losses	145
Effect of assumptions changes or inputs	(69)
Benefit payments	(875)
Net changes	(119)
Balance at 6/30/2021	$ 6,090

Changes in assumptions and other inputs reflect a change in the discount rate from 3.50% in 2020 to 2.21% in 2021.

NOTE 11 – PENSION PLANS – continued
B. District Plan - Stipend – continued

Sensitivity of the total stipend liability to changes in the discount rate. The following presents the total stipend liability of the District, as well as what the District's total stipend liability would be if it were calculated using a discount rate that is 1-percentage-point lower (1.21 percent) or 1-percentage-point higher (3.21 percent) than the current discount rate:

	1% Decrease (1.21%)	Discount Rate (2.21%)	1% Increase (3.21%)
Total Stipend Liability	$ 6,280	$ 6,090	$ 5,893

Stipend Expense and Deferred Outflows of Resources and Deferred Inflows of Resources Related to Stipend

For the year ended June 30, 2021, the District recognized stipend benefit of $249. At June 30, 2021, the District reported deferred outflows of resources and deferred inflows of resources related to the stipend from the following sources:

	Deferred Ouflows of Resources	Deferred Inflows of Resources	Net
Pension differences between expected and actual experience	$ 138	$ -	$ 138
Pension differences due to changes in assumptions	42	(73)	(31)
Total (prior to post-measurement date contributions)	180	(73)	107
Pension contributions subsequent to measurement date	939	-	939
Net Deferred Outflow/(Inflow) of Resources	$ 1,119	$ (73)	$ 1,046

Deferred outflows of resources related to the stipend of $939 resulting from the District's contributions subsequent to the measurement date will be recognized as a reduction to the net pension liability in the year ended June 30, 2022.

Amounts reported as deferred outflows of resources and deferred inflows of resources related to the stipend will be recognized in the stipend expense as follows:

Employer subsequent fiscal years	Deferred Outflow/(Inflow) of Resources (prior to post-measurement date contributions)
Fiscal Year 2022	$ 43
Fiscal Year 2023	38
Fiscal Year 2024	24
Fiscal Year 2025	2
Total	$ 107

NOTE 12 - OTHER POST-EMPLOYMENT BENEFITS

Other Post-Employment Benefits (OPEB) - Summary

The District offers a retirement health insurance subsidy (RHIS) and contributes to a retirement health insurance account (RHIA) through OPERS. The breakdown of the net OPEB liability, deferred outflows of resources and deferred inflows of resources related to OPEB are:

	RHIS	RHIA	Net
Total OPEB Liability	$ (78,581)	$ -	$ (78,581)
Net OPEB Asset	$ -	$ 5,966	$ 5,966
Total OPEB Expense	$ 51	$ (841)	$ (790)
OPEB Deferred Outflows of Resources	$ 17,866	$ 1,126	$ 18,992
OPEB Deferred Inflows of Resources	$ (3,810)	$ (961)	$ (4,771)

A. Retirement Health Insurance Subsidy (RHIS)

Plan Description

The District provides a single-employer defined benefit plan that provides postemployment health, dental, vision and life insurance benefits to eligible employees and their spouses for employees who have retired from the District with a minimum of fifteen accumulated years of service and are eligible to retire from the Oregon retirement system. There are 5,820 active and 484 retired members or beneficiaries currently receiving benefit payments in the plan. Covered employees under the plan are eligible to receive full or part District-paid medical and pharmacy benefits for up to 60 months, or until reaching age 65, whichever comes first. The District also pays a portion of the spouse/domestic partner medical and pharmacy costs during the benefit period. The program was established under separate collective bargaining agreements with the certificated and classified employees and by precedent for all other District employees. The Portland Teachers Association (PAT) group terminated this benefit after September 30, 2019. All other bargaining units and employee groups, except the District Council Unions (DCU), agreed to terminate this benefit after June 30, 2014. The DCU agreed to terminate this benefit after December 31, 2014. Under Oregon Revised Statute (ORS) 243.303 any OPERS qualifying public employee is allowed to pay the full cost for continued coverage under the District group health plans until they become Medicare eligible. The plan does not issue a separate financial report, and there are no assets accumulated in a trust. The plan may be amended by the District under new collective bargaining agreements.

Benefits Provided

The District pays for the benefits. The contributions are financed on a pay-as-you-go basis. The General Fund and the Special Revenue Fund are the primary funds from which the Other Post Employment Benefit liability is liquidated.

Employees covered by benefit terms

As of June 30, 2021, the following employees were covered by the benefit terms:

Inactive employees or beneficiaries currently receiving benefit payments	355
Inactive employees entitled to but not yet receiving benefit payments	129
Active employees	5,820
	6,304

NOTE 12 - OTHER POST-EMPLOYMENT BENEFITS - continued
A. Retirement Health Insurance Subsidy (RHIS) – continued

Total RHIS Liability

The District's total RHIS liability of $78.6 million was measured as of June 30, 2020, and was determined by an actuarial valuation as of July 1, 2020, rolled forward to June 30, 2021.

Actuarial Methods and Assumptions

Actuarial methods and assumptions, with the exception of the Health Care Cost Trend, are consistent with those disclosed for the District Stipend. See Footnote 11 – Pension Plans, part B. District Plan - Stipend for additional information on Actuarial Assumptions and Methods, the Long-Term Expected Rate of Return, and the Discount Rate.

Health Care Cost Trend – The actuarial calculations used an assumption that medical costs will increase to 5.75 percent in the first year and reach an eventual ultimate rate of 4.00 percent. These trends are based on a long-term medical trend model published and updated by the Society of Actuaries. Known as the "Getzen model", it produces long-range trend assumptions built on assumed long-term relationships between certain key economic factors. It also assumes that dental and vision costs will increase by the lesser of the medical cost trend previously described and 4.00 percent per year.

Changes in the Total RHIS Liability

	Increase (Decrease) in Total RHIS Liability
Balance at 6/30/2020	$ 81,319
Changes for the year:	
Service cost	3,141
Interest	2,818
Effect of changes to benefit terms	722
Effect of economic/demographic gains or losses	(2,676)
Effect of assumptions changes or inputs	1,151
Benefit payments	(7,894)
Net changes	(2,738)
Balance at 6/30/2021	$ 78,581

Changes in assumptions and other inputs reflect a change in the discount rate from 3.50% in 2020 to 2.21% in 2021.

Sensitivity of the total RHIS liability to changes in the discount rate. The following presents the total RHIS liability of the District, as well as what the District's total RHIS liability would be if it were calculated using a discount rate that is 1-percentage-point lower (1.21 percent) or 1-percentage-point higher (3.21 percent) than the current discount rate:

	1% Decrease (1.21%)	Discount Rate (2.21%)	1% Increase (3.21%)
Total RHIS Liability	$ 83,013	$ 78,581	$ 74,295

NOTE 12 - OTHER POST-EMPLOYMENT BENEFITS - continued
A. Retirement Health Insurance Subsidy (RHIS) – continued

Sensitivity of the total RHIS liability to changes in the healthcare cost trend rates. The following presents the total RHIS liability of the District, as well as what the District's total RHIS liability would be if it were calculated using healthcare cost trend rates that are 1-percentage-point lower or 1-percentage-point higher than the current healthcare cost trend rates:

	1% Decrease	Current Trend Rate	1% Increase
Total RHIS Liability	$ 72,330	$ 78,581	$ 85,740

RHIS Expense and Deferred Outflows of Resources and Deferred Inflows of Resources Related to RHIS

For the year ended June 30, 2021, the District recognized RHIS expense of $51. At June 30, 2021, the District reported deferred outflows of resources and deferred inflows of resources related to RHIS from the following sources:

	Deferred Ouflows of Resources	Deferred Inflows of Resources	Net
OPEB differences between expected and actual experience	$ 2,510	$ (2,368)	$ 142
OPEB differences due to changes in assumptions	7,630	(1,442)	6,188
Total (prior to post-measurement date contributions)	10,140	(3,810)	6,330
OPEB contributions subsequent to measurement date	7,726	-	7,726
Total as of June 30, 2020	$ 17,866	$ (3,810)	$ 14,056

Deferred outflows of resources related to RHIS of $7.7 million resulting from the District's contributions subsequent to the measurement date will be recognized as an increase in the net OPEB asset in the year ended June 30, 2022. Other amounts reported as deferred outflows of resources and deferred inflows of resources related to RHIS will be recognized in RHIS expense as follows:

Employer subsequent fiscal years	Deferred Outflow/(Inflow) of Resources (prior to post-measurement date contributions)
Fiscal Year 2022	$ 1,094
Fiscal Year 2023	1,094
Fiscal Year 2024	1,094
Fiscal Year 2025	1,094
Fiscal Year 2026	1,411
Thereafter	543
Total	$ 6,330

NOTE 12 - OTHER POST-EMPLOYMENT BENEFITS – continued

B. Retirement Health Insurance Account (RHIA)

Plan Description

As a member of Oregon Public Employees Retirement System (OPERS) the District contributes to the Retirement Health Insurance Account (RHIA) for each of its eligible employees. RHIA is a cost-sharing multiple-employer defined benefit other postemployment benefit plan administered by OPERS. Oregon Revised Statute (ORS) 238.420 established this trust fund. Authority to establish and amend the benefit provisions of RHIA reside with the Oregon Legislature. The plan is closed to new entrants after January 1, 2004. OPERS issues a publicly available financial report that includes financial statements and required supplementary information and is available at: http://www.oregon.gov/pers/Pages/Financials/Actuarial-Financial-Information.aspx

Benefits

RHIA pays a monthly contribution toward the cost of Medicare companion health insurance premiums of eligible retirees.

Contributions

Because RHIA was created by enabling legislation (ORS 238.420), contribution requirements of the plan members and the participating employers were established and may be amended only by the Oregon Legislature. ORS require that an amount equal to $60 dollars or the total monthly cost of Medicare companion health insurance premiums coverage, whichever is less, shall be paid from the Retirement Health Insurance Account established by the employer, and any monthly cost in excess of $60 dollars shall be paid by the eligible retired member in the manner provided in ORS 238.410. To be eligible to receive this monthly payment toward the premium cost the member must: (1) have eight years or more of qualifying service in OPERS at the time of retirement or receive a disability allowance as if the member had eight years or more of creditable service in OPERS, (2) receive both Medicare Parts A and B coverage, and (3) enroll in an OPERS-sponsored health plan. A surviving spouse or dependent of a deceased OPERS retiree who was eligible to receive the subsidy is eligible to receive the subsidy if he or she (1) is receiving a retirement benefit or allowance from OPERS or (2) was insured at the time the member died and the member retired before May 1, 1991.

The District's rates in effect for the fiscal year ended June 30, 2021 were:

Tier One / Tier Two	0.06%
OPSRP General Service	0.00%

District contributions for the year ended June 30, 2021 were $71.

RHIA Liabilities, RHIA Expense, and Deferred Outflows of Resources and Deferred Inflows of Resources Related to RHIA

At June 30, 2021, the District reported an asset of $6.0 million for its proportionate share of the OPERS net RHIA asset. The net RHIA asset was measured as of June 30, 2020, and the total RHIA liability used to calculate the net RHIA asset was determined by an actuarial valuation as of December 31, 2018 rolled forward to June 30, 2020. The District's proportion of the net RHIA asset was based on the District's actual, legally required contributions made to the RHIA program during the measurement period relative to total actual contributions from all participating employers. At June 30, 2021, the District's proportionate share was 2.93%, which is a decrease of 0.38% from its proportion of 3.31% as of June 30, 2020.

NOTE 12 - OTHER POST-EMPLOYMENT BENEFITS – Continued
B. Retirement Health Insurance Account (RHIA) - Continued

For the year ended June 30, 2021, the District recognized RHIA benefit from this plan of $841. At June 30, 2021, the District reported deferred outflows of resources and deferred inflows of resources related to this RHIA plan from the following sources:

	Deferred Outflows of Resources	Deferred Inflows of Resources	Net
RHIA differences between expected and actual experience	$ -	$ (610)	$ (610)
RHIA differences due to changes in assumptions	-	(317)	(317)
RHIA net difference between projected and actual earnings on investments	663	-	663
RHIA changes in employer proportion	392	(34)	358
	1,055	(961)	94
RHIA contributions subsequent to measurement date	71	-	71
Total	$ 1,126	$ (961)	$ 165

Source: OPERS Schedule of OPEB Amounts under GASB 75, June 30, 2020

Deferred outflows of resources related to RHIA of $71 resulting from the District's contributions subsequent to the measurement date will be recognized as an increase in the net OPEB asset in the year ended June 30, 2022. Other amounts reported as deferred outflows of resources and deferred inflows of resources related to RHIA will be recognized in RHIA expense as follows:

Employer subsequent fiscal years	Deferred Outflow/(Inflow) of Resources (prior to post-measurement date contributions)
Fiscal Year 2022	$ (420)
Fiscal Year 2023	59
Fiscal Year 2024	245
Fiscal Year 2025	210
Total	$ 94

Source: OPERS Schedule of OPEB Amounts under GASB 75, June 30, 2020

Actuarial Methods and Assumptions

All actuarial methods and assumptions are consistent with those disclosed for the OPERS Pension Plan. See Footnote 11 – Pension Plans, part A. Oregon Public Employees Retirement System (OPERS) for additional information on Actuarial Assumptions and Methods, the Long-Term Expected Rate of Return, and the Discount Rate.

NOTE 12 - OTHER POST-EMPLOYMENT BENEFITS – Continued
B. Retirement Health Insurance Account (RHIA) - Continued

Sensitivity of the District's proportionate share of the net RHIA liability (asset) to changes in the discount rate

The following presents the District's proportionate share of the net RHIA liability (asset), as well as what the District's proportionate share of the net RHIA liability (asset) would be if it were calculated using a discount rate that is 1-percentage-point lower (6.20 percent) or 1-percentage-point higher (8.20 percent) than the current discount rate:

	1% Decrease (6.20%)	Discount Rate (7.20%)	1% Increase (8.20%)
Net RHIA liability (asset)	$ (4,816)	$ (5,966)	$ (6,949)

RHIA Plan Fiduciary Net Position

Detailed information about the RHIA plan's fiduciary net position is available in the separately issued OPERS financial report.

NOTE 13 - RISK MANAGEMENT

The Internal Service (Self-Insurance) Fund charges other funds for the costs incurred for workers' compensation claims. Charges to other funds by the Self-Insurance Fund are recognized as revenues in the Self-Insurance Fund and as expenditures in the fund incurring the charges. The Self-Insurance Fund recognized approximately $1.5 million of revenues from other governmental funds for the year ended June 30, 2021.

The District is exposed to various risks of loss related to injuries; torts; theft or damage to and destruction of assets; errors and omissions; and natural disasters. The District is self-insured up to $1 million and carries commercial excess insurance. Settlements have not exceeded insurance coverage for the years ended June 30, 2019 through 2021. There have been no reductions to the District's insurance coverage during the year ended June 30, 2021. The District anticipates that all accrued claims losses will be paid within twelve months.

The total claims payable at June 30, 2021 of $5.6 million was made up of approximately $2.9 million in worker's compensation claims (recorded in the Internal Service Fund) and $2.7 million in property and general liability claims (accounted for in the General Fund and not accrued on the fund financial statements). Changes in the balances of claims liabilities during the years ended June 30, 2019, through June 30, 2021, were as follows:

Fiscal Year	Beginning Balance	New Claims	Payments on Claims	Ending Balance
2019	$ 5,894	$ 2,317	$ (1,368)	$ 6,843
2020	6,843	3,905	(3,895)	6,853
2021	6,853	2,516	(3,795)	5,574

NOTE 14 – COMMITMENTS AND CONTINGENT LIABILITIES

Operating leases

The District has operating leases for various equipment. Future minimum required payments under these operating leases are:

2022	$1,019
2023	857
2024	502
2025	323
2026	108
Total minimum payments	$2,809

Contracts

Under Oregon Revised Statute No. 279, should funding not be available, the following contracts may be cancelled without penalty. Estimated future District service commitments in excess of $3.0 million are listed as follows:

Supplier	Commitments
Hoffman Construction Company of Oregon	$ 112,166
First Student Inc	71,850
Andersen Construction Co of Oregon LLC	27,085
Fortis Construction Inc	9,108
Bassetti Architects PS	7,891
2KG Contractors Inc	5,239
	$ 233,339

Future District service commitments by fund are as follows:

	Commitments
General Fund	$ 71,850
Capital Projects Fund	161,489
	$ 233,339

Blanchard Educational Service Center (BESC)

In June 2000, Multnomah County leased a portion of the BESC facility from the District for $3.5 million under a 99-year agreement. In December 2008, Portland Public Schools reacquired a portion of that space for $800 thousand, which was fully paid as of June 30, 2014. This lease agreement stipulates that a portion of the initial lease payment received from Multnomah County be set aside to be applied toward the County's share of major repairs. Any unused balance earns interest at the monthly interest rate earned from the Local Government Investment Pool. As of June 30, 2021 the Multnomah County Reserve balance held in the Facilities Capital Fund, a sub-fund of the Capital Projects Fund, was $541.

NOTE 14 – COMMITMENTS AND CONTINGENT LIABILITIES - continued

Equipment Leases

In July 2012, the District entered into a 5-year lease for copier equipment from Copytronix, commencing August 2012. This lease was extended for an additional 5 years, through July 2022, for $14 thousand per month.

In October 2017, the District entered into a multi-year lease for IT equipment (laptops, Chromebooks, etc.) from Insight Investments, LLC, commencing November 2017. The District has subsequently extended and amended this lease to include additional IT equipment and CISCO telephone hardware with varying terms (3 to 5 years in duration) and commencement dates (November 2017 to June 2020).

In August 2020, the District entered into a 5-year lease for facilities equipment from JPMorgan Chase Bank, commencing October 2020.

Pending Legal Actions

The District is a defendant in certain pending legal actions. Although the outcome cannot be determined, the District believes that settlement of these matters will not have a material effect on the District's financial position and results of operations.

Grantor Agencies

Amounts received or receivable from grantor agencies are subject to audit and adjustment by these agencies, principally the federal government. Any disallowed claims, including amounts already collected, may constitute a liability of the district. The amount, if any, of costs which may be disallowed by the grantor cannot be determined at this time, although district management expects such amounts, if any, to be immaterial.

School Support Fund

A substantial portion of the District's funding consists of an apportionment of funds from the State Basic School Support Fund. This apportionment is determined by a formula taking into account the District's weighted average daily student membership and revenue derived from local District sources. Local District sources may vary from year to year and may be revised retroactively or prospectively changing the amount of State Basic School Support received or to be received.

NOTE 15 – FUND BALANCES

Fund balances by classification for the year ended June 30, 2021 are as follows:

	General Fund	Special Revenue Fund	Debt Service Fund	Capital Projects Fund	Total Governmental Funds
Nonspendable					
Prepaid items	$ 628	$ -	$ -	$ 4,170	$ 4,798
Inventories	317	1,494	-	-	1,811
	945	1,494	-	4,170	6,609
Restricted					
Special Revenue Fund	-	20,441	-	-	20,441
Debt Service Fund	-	-	10,482	-	10,482
Capital Projects Funds	-	-	-	757,216	757,216
	-	20,441	10,482	757,216	788,139
Committed					
Special Revenue Fund	-	19,056	-	-	19,056
Debt Service Fund	-	-	1,190	-	1,190
	-	19,056	1,190	-	20,246
Assigned					
Capital Projects Fund	-	-	-	10,204	10,204
Unassigned	87,746	(12,768)	-	-	74,978
Total fund balances	$ 88,691	$ 28,223	$ 11,672	$ 771,590	$ 900,176

NOTE 16 – RELATED ORGANIZATIONS

The District includes six charter schools that are legally separate, tax-exempt organizations. The most recent data available indicates charter school total students were 1,443 (representing 3.0% of the District's total enrollment); and that charter schools' Net Position was $363. Because of their size relative to the District, the charter schools do not fall under the component unit reporting requirements set forth by GASB Statement No. 39.

NOTE 17 – ARTS TAX

In November, 2012, voters in the City of Portland passed Ballot Measure 26-146 to restore school arts and music education, funded through an income tax of $35 per person per year. In December of 2012, the District entered into an intergovernmental agreement IGA/R 59656 with the City of Portland to receive a portion of this tax, to be used to provide arts and music education, through certified arts and music teachers, to all K-5 students, including charter schools within the District. Revenues and expenditures for the year ended June 30, 2021 are recorded in the General Fund as follows:

	Arts Tax Revenues	Arts Tax Expenditures[1]	FTE Funded	Number of Schools Funded
Non-Charter Schools	$ 4,676	$ 5,545	66.85	60
Charter Schools	164	160	2.81	6
District Total	$ 4,839	$ 5,706	69.66	66

[1] Includes amounts for unexpended revenues carried forward from prior years.

NOTE 18 – TAX ABATEMENTS

The District is subject to tax abatements (exemptions) granted by Multnomah, Washington and Clackamas counties of Oregon. Counties are allowed to grant abatements due to numerous Oregon Revised Statutes (ORS). Washington and Clackamas counties had no tax abatements affecting the District. Multnomah county has numerous abatement programs which affected District revenue as described below.

Historic Property (ORS 358.475 to 545)

The Special Assessment for Historic Property program is a state-sponsored incentive program instituted in 1975 to encourage the preservation and appropriate rehabilitation of properties listed in the National Register of Historic Places. Under this program a property is specially assessed for a period of 10-15 years. This allows the owner to restore or improve the condition of the property and not pay additional taxes on the resulting increase in the property's value until the ten-year benefit period has expired.

Day Care Centers, Student Housing and Religious Schools (ORS 307.145)

The child care facilities, schools, academies and student housing accommodations, owned or being purchased by incorporated eleemosynary institutions or by incorporated religious organizations, used exclusively by such institutions or organizations for or in immediate connection with educational purposes, are exempt from taxation.

Transit Oriented Development (ORS 307.600 to 307.637)

Cities and counties may grant a property tax exemption for multiple unit rental housing (excluding land) in areas designated as core areas, light rail station areas and transit oriented areas for up to 10 successive years. Housing that can qualify for this exemption includes newly constructed housing and property converted to housing use.

City of Portland Low Income Rental Housing (ORS 307.540 to 307.548)

In 1985, Oregon legislature authorized a property tax exemption for low-income housing held by charitable, nonprofit organizations. The tax exemption is intended to benefit low-income renters by alleviating property tax burden on those agencies that provide this housing opportunity. The qualifying property must be located within the city of Portland.

Enterprise Zone (ORS 285C.050 to 285C.255)

The Oregon Enterprise Zone program is a State of Oregon economic development program established, that allows for property tax exemptions for up to five years. In exchange for receiving property tax exemption, participating firms are required to meet the program requirements set by state statute and the local sponsor. The Enterprise Zone program allows industrial firms that will be making a substantial new capital investment a waiver of 100% of the amount of real property taxes attributable to the new investment for a 5-year period after completion. Land or existing machinery or equipment is not tax exempt; therefore, there is no loss of current property tax levies to local taxing jurisdiction.

Housing Authority Partnership (ORS 456.225)

The property of a housing authority is declared to be public property used for essential public and governmental purposes. The property and the housing authority are exempt from all taxes and special assessments of the city, the county, the state or any political subdivision of the city, county or state.

NOTE 18 – TAX ABATEMENTS – continued

The Following schedule represents the District's portion of tax abatements granted by Multnomah County for 2020-21. Programs with exemptions totaling more than $500 thousand were listed separately; all other programs were grouped together:

Exemption Program	Amount
City of Portland Low Income Rental Housing	$ 4,088
Historic Property	3,560
Day Care Centers, Student Housing & Religious Schools	2,692
Transit Oriented Development, Portland	1,671
Enterprise Zone	1,256
Housing Authority Partnership	593
All other exemption programs	615
Total Abatements	$ 14,475

NOTE 19 – SUBSEQUENT EVENTS

The date to which events occurring after June 30, 2020, the date of the most recent statement of net position, has been evaluated for possible adjustment to the financial statements or disclosure is December 3, 2021, which is the date on which the financial statements were available to be issued.

In July 2021 the District issued $399,390 of Full Faith and Credit Pension Obligation Bonds, Series 2021, at interest rates ranging from 0.30 to 2.50 percent, and a final maturity date of June 30, 2040. The bond proceeds were used to reduce the District's allocated portion of pension obligation related to the estimated unfunded actuarial liability (UAL) of the Oregon Public Employees Retirement System ("OPERS"). The total costs of financing the District's actuarial obligation in this manner is anticipated to result in a significant savings to the District when compared to paying higher OPERS contribution rates. In August 2021, the District's OPERS rates were reduced as a direct result of this debt issuance as follows:

	July 1 2021	August 1 2021
Tier One / Tier Two	6.42%	0.00%
OPSRP General Service	3.36%	0.00%

REQUIRED SUPPLEMENTARY INFORMATION

The information in this section compares budget to actual for the District's General and major special revenue funds.

The budgetary basis of accounting for all funds is modified accrual, which is the same as that required by accounting principles generally accepted in the United States of America. Unless otherwise noted, a reconciliation of budgetary to generally accepted accounting principles activity is not required.

Under the provisions of GASB Statement No. 68, a Schedule of the District's Proportion of Net Pension Liability and District Contributions is included in the Required Supplementary Information.

Under the provisions of GASB Statement No. 73, a Schedule of the District's Proportion of Net Pension Liability and District Contributions is included in the Required Supplementary Information.

Under the provisions of GASB Statement No. 75, a Schedule of the District's Proportionate Share of the Net OPEB Liability and District Contributions for RHIA and RHIS, and a Schedule of Changes in the District's Total OPEB Liability and Related Ratios for OPEB is included in the Required Supplementary Information.

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Required Supplementary Information
Schedule of Changes in the District's Total OPEB Liability and Related Ratios- RHIS
Last 10 Fiscal Years [1]
(amounts expressed in thousands)

Total OPEB Liability

	2017	2018	2019	2020	2021
Service cost	N/A	$ 2,549	$ 2,319	$ 2,842	$ 3,141
Interest	N/A	2,160	2,475	3,128	2,818
Change in benefit terms	N/A	-	2,711	-	722
Differences between expected and actual experience	N/A	-	3,880	-	(2,676)
Changes of assumptions or other inputs	N/A	(2,848)	8,157	1,744	1,151
Benefit payments	N/A	(8,575)	(8,024)	(8,697)	(7,894)
Net change in total OPEB liability	N/A	(6,714)	11,518	(983)	(2,738)
Total OPEB liability - beginning	N/A	77,498	70,784	82,302	81,319
Total OPEB liability - ending	$ 77,498	$ 70,784	$ 82,302	$ 81,319	$ 78,581
Covered-employee payroll	$ 327,668	$ 344,646	$ 356,540	$ 375,041	$ 386,877
Total OPEB liability as a percentage of covered-employee payroll	23.65%	20.54%	23.08%	21.68%	20.31%

[1] Amounts presented above were determined as of 6/30. Additional years will be presented as they become available.

Requests for Information:

Copies of the District's most recent *Actuarial Valuation of GASB 45, GASB 75, and GASB 73 Postemployment Benefits* are available. Please direct requests to the Finance Department; Portland Public Schoools; 501 N. Dixon Street; Portland, OR 97227.

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Required Supplementary Information
Schedule of the District's Proportionate Share of Net OPEB Liability (Asset) and District Contributions - RHIA
Last 10 Fiscal Years [1]
(amounts expressed in thousands)

District's Proportionate Share of Net OPEB Liability (Asset)

	2017	2018	2019	2020	2021
District's proportion of the net OPEB liability/(asset)	3.284%	3.164%	3.194%	3.312%	2.928%
District's proportionate share of the net OPEB liability (asset)	$ 892	$ (1,321)	$ (3,566)	$ (6,400)	$ (5,966)
District's covered-employee payroll [2]	$ 316,998	$ 327,668	$ 344,646	$ 356,540	$ 375,041
District's proportionate share of net OPEB liability (asset) as a percentage of covered-employee payroll	0.3%	-0.4%	-1.0%	-1.8%	-1.6%
Plan fiduciary net position as a percentage of the total OPEB liability	94.14%	108.89%	124.01%	144.34%	150.05%
OPEB Measurement Date	6/30/2016	6/30/2017	6/30/2018	6/30/2019	6/30/2020

[1] Amounts presented above were determined as of 6/30. Additional years will be presented as they become available.

[2] Amounts for covered payroll use the prior year's data to match the measurement date used by the pension plan (OPERS) for each fiscal year presented above.

Schedule of District Contributions

	2017	2018	2019	2020	2021
Contractually required contribution	$ 1,575	$ 1,547	$ 1,641	$ 209	$ 71
Contributions in relation to the contractually required contribution	1,575	1,547	1,641	209	71
Contribution deficiency(excess)	$ -	$ -	$ -	$ -	$ -
District's covered-employee payroll	$ 327,668	$ 344,646	$ 356,540	$ 375,041	$ 386,877
Contributions as a percentage of covered-employee payroll	0.48%	0.45%	0.46%	0.06%	0.02%

Copies of OPERS' most recent actuarial report of its Pension Plan are available at:
http://www.oregon.gov/PERS/Pages/Financials/Previous-Years.aspx

Notes to Required Supplementary Information

Changes in Plan Provisions

A summary of key changes in plan provisions are described in the annual letter from Oregon Public Employees Retirement System's actuary, which can be found at:
https://www.oregon.gov/pers/EMP/Documents/GASB/2020/GASB_75_Actuary_Letter.pdf

Changes of Assumptions

Additional details and a comprehensive list of changes in methods and assumptions can be found in the 2018 Experience Study for the System, which was published on July 24, 2019, and can be found at:
https://www.oregon.gov/pers/Documents/Exp_Study_2018.pdf

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Required Supplementary Information
Schedule of the District's Proportionate Share of Net Pension Liability (Asset) and District Contributions
Last 10 Fiscal Years [1]
(amounts expressed in thousands)

District's Proportionate Share of Net Pension Liability (Asset)

	2014	2015	2016	2017	2018	2019	2020	2021
District's proportion of the net pension liability/asset	0.254%	0.254%	0.299%	1.380%	2.102%	2.286%	1.770%	2.389%
District's proportionate share of the net pension liability (asset)	$ 12,953	$ (5,754)	$ 17,185	$ 207,203	$ 283,305	$ 346,266	$ 306,140	$ 521,329
District's covered payroll [2]	$ 256,741	$ 264,386	$ 283,935	$ 316,998	$ 327,668	$ 344,646	$ 356,540	$ 375,041
District's proportionate share of net pension liability (asset) as a percent of covered payroll	5.0%	(2.2%)	6.1%	65.4%	86.5%	100.5%	85.9%	139.0%
Plan fiduciary net position as a percentage of the total pension liability	92.0%	103.6%	91.9%	80.5%	83.12%	82.07%	80.23%	75.79%
OPERS Measurement Date	6/30/2013	6/30/2014	6/30/2015	6/30/2016	6/30/2017	6/30/2018	6/30/2019	6/30/2020

[1] Amounts presented above were determined as of 6/30. Additional years will be presented as they become available.

[2] Amounts for covered payroll use the prior year's data to match the measurement date used by the pension plan (OPERS) for each fiscal year presented above.

Schedule of District Contributions

	2014	2015	2016 [3]	2017 [3]	2018 [4]	2019	2020	2021
Contractually required contribution	$ 4,785	$ 4,895	$ -	$ -	$ -	$ 8,351	$ 24,834	$ 17,684
Contributions in relation to the contractually required contribution	4,785	4,895	-	-	-	8,351	24,834	17,684
Contribution deficiency(excess)	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
District's covered payroll	$ 264,386	$ 283,935	$ 316,998	$ 327,668	$ 344,646	$ 356,540	$ 375,041	$ 386,877
Contributions as a percentage of covered payroll	1.81%	1.72%	0.00%	0.00%	0.00%	2.34%	6.62%	4.57%

[3] Contribution rates were zero due to the rate offset provided by the District's OPERS side account funded by the district's Limited Tax Pension Bonds.

[4] OPERS side account resources were used to satisfy all contribuiton requirements.

Copies of OPERS' most recent actuarial report of its Pension Plan are available at:
http://www.oregon.gov/PERS/Pages/Financials/Previous-Years.aspx

Notes to Required Supplementary Information

Changes in Plan Provisions

A summary of key changes in plan provisions are described in the annual letter from Oregon Public Employees Retirement System's actuary, which can be found at:
https://www.oregon.gov/pers/EMP/Pages/GASB.aspx

Changes of Assumptions

Additional details and a comprehensive list of changes in methods and assumptions can be found in the 2018 Experience Study for the System, which was published on July 24, 2019, and can be found at:
https://www.oregon.gov/pers/Documents/Exp_Study_2018.pdf

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Required Supplementary Information
Schedule of Changes in the District's Total Pension Liability and Related Ratios-Stipend
Last 10 Fiscal Years [1]
(amounts expressed in thousands)

Total Pension Liability

	2016	2017	2018	2019	2020	2021
Service cost	N/A	$ 174	$ 212	$ 194	$ 188	$ 207
Interest	N/A	304	211	228	250	209
Change in benefit terms	N/A	-	-	797	-	264
Differences between expected and actual experience	N/A	-	-	94	-	145
Changes of assumptions or other inputs	N/A	235	(158)	(68)	79	(69)
Benefit payments	N/A	(1,301)	(1,389)	(1,174)	(1,132)	(875)
Net change in total pension liability	N/A	(587)	(1,124)	71	(615)	(119)
Total pension liability - beginning	N/A	8,465	7,877	6,753	6,824	6,209
Total pension liability - ending	$ 8,465	$ 7,877	$ 6,753	$ 6,824	$ 6,209	$ 6,090
Covered-employee payroll	N/A	70,988	68,838	63,301	58,067	68,456
Total pension liability as a percentage of covered-employee payroll	N/A	11.10%	9.81%	10.78%	10.69%	8.90%

[1] Amounts presented above were determined as of 6/30. Additional years will be presented as they become available.

[2] Assets are not accumulated in a trust. Contributions are financed on a pay-as-you-go basis.

Requests for Information:

Copies of the District's most recent *Actuarial Valuation of GASB 45, GASB 75, and GASB 73 Postemployment Benefits* are available. Please direct requests to the Finance Department; Portland Public Schoools; 501 N. Dixon Street; Portland, OR 97227.

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
General Fund
Schedule of Revenues, Expenditures, and
Changes in Fund Balance - Budget and Actual
For the year ended June 30, 2021
(amounts expressed in thousands)

	Budgeted Amounts		Actual Amounts	Variance from Final Budget Positive/ (Negative)
	Original	Final		
REVENUES				
Property and other taxes	$ 282,627	$ 282,627	$ 286,029	$ 3,402
State School Fund	267,735	267,735	263,622	(4,113)
Local option taxes	101,898	101,898	102,417	519
County and intermediate sources	14,027	14,027	14,381	354
Federal and state support	-	-	18	18
State Common School Fund	4,744	4,744	5,628	884
Charges for services	3,961	3,961	1,642	(2,319)
Investment earnings	2,338	2,338	544	(1,794)
Other	5,644	5,644	5,681	37
Total revenues	682,974	682,974	679,962	(3,012)
EXPENDITURES				
Current:				
Instruction:				
Regular programs:				
Salaries and benefits	257,018	262,003	263,656	(1,653)
Materials and services	12,501	19,331	878	18,453
Total regular programs	269,519	281,334	264,534	16,800
Special programs:				
Salaries and benefits	75,107	74,682	71,823	2,859
Materials and services	27,594	28,078	27,094	984
Total special programs	102,701	102,760	98,917	3,843
Summer school programs:				
Salaries and benefits	90	384	406	(22)
Materials and services	1,620	1,620	8	1,612
Total summer school programs	1,710	2,004	414	1,590
Total instruction	**373,930**	**386,098**	**363,865**	**22,233**
Support services:				
Students:				
Salaries and benefits	66,770	66,196	65,143	1,053
Materials and services	7,692	6,959	7,337	(378)
Total students	74,462	73,155	72,480	675
Instructional staff:				
Salaries and benefits	35,484	36,747	37,507	(760)
Materials and services	3,484	4,225	1,761	2,464
Total instructional staff	38,968	40,972	39,268	1,704
General administration:				
Salaries and benefits	9,424	8,153	7,261	892
Materials and services	7,054	6,313	4,892	1,421
Total general administration	16,478	14,466	12,153	2,313

Note: Bolded lines indicate legally required appropriation budget levels of control

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
General Fund
Schedule of Revenues, Expenditures, and
Changes in Fund Balance - Budget and Actual (continued)
For the year ended June 30, 2021
(amounts expressed in thousands)

	Budgeted Amounts		Actual	Variance from Final Budget Positive/
Support services (continued):	Original	Final	Amounts	(Negative)
School administration:				
Salaries and benefits	$ 48,447	$ 46,015	$ 48,149	$ (2,134)
Materials and services	1,115	2,754	446	2,308
Total school administration	49,562	48,769	48,595	174
Business:				
Salaries and benefits	54,713	54,322	48,088	6,234
Materials and services	49,043	51,128	37,947	13,181
Total business	103,756	105,450	86,035	19,415
Central:				
Salaries and benefits	20,863	21,914	18,650	3,264
Materials and services	7,742	8,680	8,538	142
Total central	28,605	30,594	27,188	3,406
Total support services	**311,831**	**313,406**	**285,719**	**27,687**
Enterprise and community services:				
Food Service:				
Salaries and benefits	91	91	16	75
Materials and services	74	74	4	70
Total Food Services	165	165	20	145
Community Services:				
Salaries and benefits	560	560	541	19
Materials and services	1,089	5,089	4,554	535
Total Community Services	1,649	5,649	5,095	554
Total enterprise and community services	**1,814**	**5,814**	**5,115**	**699**
Total current expenditures	687,575	705,318	654,699	50,619
Operating contingency	**40,946**	**40,946**	**-**	**40,946**
Total expenditures	728,521	746,264	654,699	91,565
Excess (deficit) of revenues over expenditures	(45,547)	(63,290)	25,263	88,553
OTHER FINANCING SOURCES (USES)				
Transfers out	**(1,134)**	**(1,234)**	**(1,198)**	**36**
Proceeds from the sale of capital assets	50	50	152	102
Total other financing sources and (uses)	(1,084)	(1,184)	(1,046)	138
Net change in fund balance	(46,631)	(64,474)	24,217	88,691
Fund balance - beginning of year	46,631	64,474	64,474	-
Fund balance - end of year	$ -	$ -	$ 88,691	$ 88,691

Note: Bolded lines indicate legally required appropriation budget levels of control

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Special Revenue Fund
Schedule of Revenues, Expenditures, and
Changes in Fund Balance - Budget and Actual
For the year ended June 30, 2021
(amounts expressed in thousands)

	Budgeted Amounts		Actual	Variance from Final Budget Positive/
	Original	Final	Amounts	(Negative)
REVENUES				
Property and other taxes	$ 305	$ 305	$ 309	$ 4
Federal and state support	131,707	134,790	107,293	(27,497)
County and intermediate sources	3,669	4,121	2,804	(1,317)
Charges for services	4,448	4,348	256	(4,092)
Investment earnings	143	143	81	(62)
Extracurricular activities	8,600	8,600	1,237	(7,363)
Other	6,193	6,193	7,446	1,253
Total revenues	155,065	158,500	119,426	(39,074)
EXPENDITURES				
Current:				
Instruction:				
Regular programs:				
Salaries and benefits	33,874	22,346	21,645	701
Materials and services	15,021	22,304	6,181	16,123
Total regular programs	48,895	44,650	27,826	16,824
Special programs:				
Salaries and benefits	20,438	19,484	17,092	2,392
Materials and services	14,014	10,363	7,663	2,700
Total special programs	34,452	29,847	24,755	5,092
Summer school programs:				
Salaries and benefits	758	758	233	525
Materials and services	463	1,360	433	927
Total summer school programs	1,221	2,118	666	1,452
Total instruction	**84,568**	**76,615**	**53,247**	**23,368**
Support services:				
Students:				
Salaries and benefits	20,472	23,324	18,847	4,477
Materials and services	7,326	14,467	4,626	9,841
Total students	27,798	37,791	23,473	14,318
Instructional staff:				
Salaries and benefits	12,089	8,627	9,905	(1,278)
Materials and services	4,765	3,834	4,183	(349)
Total instructional staff	16,854	12,461	14,088	(1,627)
General administration:				
Salaries and benefits	208	210	21	189
Materials and services	31	55	61	(6)
Total general administration	239	265	82	183
School administration:				
Salaries and benefits	1,256	1,682	2,212	(530)
Materials and services	357	357	61	296
Total school administration	1,613	2,039	2,273	(234)

Note: Bolded lines indicate legally required appropriation budget levels of control

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Special Revenue Fund
Schedule of Revenues, Expenditures, and
Changes in Fund Balance - Budget and Actual (continued)
For the year ended June 30, 2021
(amounts expressed in thousands)

	Budgeted Amounts		Actual	Variance from Final Budget Positive/
	Original	Final	Amounts	(Negative)
Support services (continued):				
Business:				
Salaries and benefits	$ -	$ 25	$ 1,257	$ (1,232)
Materials and services	5,020	7,053	12,188	(5,135)
Total business	5,020	7,078	13,445	(6,367)
Central:				
Salaries and benefits	28	62	856	(794)
Materials and services	3,197	4,292	768	3,524
Total central	3,225	4,354	1,624	2,730
Total support services	**54,749**	**63,988**	**54,985**	**9,003**
Enterprise and community services:				
Food Services:				
Salaries and benefits	10,006	10,031	8,540	1,491
Materials and services	11,362	11,437	7,147	4,290
Total food services	21,368	21,468	15,687	5,781
Community services:				
Salaries and benefits	2,153	2,173	2,083	90
Materials and services	340	2,449	1,029	1,420
Total community services	2,493	4,622	3,112	1,510
Total enterprise and community services	**23,861**	**26,090**	**18,799**	**7,291**
Facilities acquisition & construction:				
Materials and services	14	34	27	7
Total facilities acquisition and construction	**14**	**34**	**27**	**7**
Total current expenditures	163,192	166,727	127,058	39,669
Total expenditures	163,192	166,727	127,058	39,669
Excess (deficit) of revenues over expenditures	(8,127)	(8,227)	(7,632)	595
OTHER FINANCING SOURCES (USES)				
Transfers in	-	760	716	(44)
Transfers out	-	(660)	(651)	9
Proceeds from the sale of capital assets	34	34	-	(34)
Total other financing sources (uses)	34	134	65	(69)
Net change in fund balance	(8,093)	(8,093)	(7,567)	526
Fund balance - beginning of year	36,735	36,735	35,790	(945)
Fund balance - end of year	$ 28,642	$ 28,642	$ 28,223	$ (419)

Note: Bolded lines indicate legally required appropriation budget levels of control

SUPPLEMENTARY INFORMATION

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Debt Service Fund
Schedule of Revenues, Expenditures, and
Changes in Fund Balance - Budget and Actual
For the year ended June 30, 2021
(amounts expressed in thousands)

	Budgeted Amounts		Actual	Variance from Final Budget Positive/
	Original	Final	Amounts	(Negative)
REVENUES				
Property and other taxes	$ 130,464	$ 130,464	$ 131,818	$ 1,354
Federal and state support	54	54	53	(1)
Charges for services	50,374	50,375	55,146	4,771
Investment earnings	1,221	1,221	292	(929)
Other	3,559	3,559	-	(3,559)
Total revenues	185,672	185,673	187,309	1,636
EXPENDITURES				
Current:				
Debt service:				
Principal	124,039	124,040	119,759	4,281
Interest and fiscal charges	67,405	67,405	72,016	(4,611)
Total debt service	**191,444**	**191,445**	**191,775**	**(330)** [1]
Total current expenditures	191,444	191,445	191,775	(330)
Total expenditures	191,444	191,445	191,775	(330)
Excess (deficit) of revenues over expenditures	(5,772)	(5,772)	(4,466)	1,306
OTHER FINANCING SOURCES (USES)				
Transfers in	1,751	1,751	1,750	(1)
Issuance of refunding bonds	-	-	53,965	53,965
Premium on issuance of debt	-	-	1,631	1,631
Payment to refunded bond escrow agent	-	-	(55,031)	(55,031)
Total other financing sources (uses)	1,751	1,751	2,315	564
Net change in fund balance	(4,021)	(4,021)	(2,151)	1,870
Fund balance - beginning of year	14,250	14,250	13,823	(427)
Fund balance - end of year	$ 10,229	$ 10,229	$ 11,672	$ 1,443

[1] The budget variance meets an exception to ORS 294.338(1) as described in ORS 294.338(4)(c); issuance costs relate to refunded debt in 2020-21.

Note: Bolded lines indicate legally required appropriation budget levels of control

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Capital Projects Fund
Schedule of Revenues, Expenditures, and
Changes in Fund Balance - Budget and Actual
For the year ended June 30, 2021
(amounts expressed in thousands)

	Budgeted Amounts		Actual	Variance from Final Budget Positive/
	Original	Final	Amounts	(Negative)
REVENUES				
Property and other taxes	$ 6,001	$ 6,001	$ 3,446	$ (2,555)
Federal and state support	3,500	3,500	1,319	(2,181)
Charges for services	600	600	15	(585)
Investment earnings	5,090	5,090	2,101	(2,989)
Other	1,075	1,075	1,501	426
Total revenues	16,266	16,266	8,382	(7,884)
EXPENDITURES				
Current:				
Instruction:				
Regular programs:				
Materials and services	29,644	-	-	-
Total regular programs	29,644	-	-	-
Total instruction	**29,644**	**-**	**-**	**-**
Support services:				
Business:				
Salaries and benefits	138	138	128	10
Materials and services	7,314	7,804	6,582	1,222
Total business	7,452	7,942	6,710	1,232
Central:				
Materials and services	52,500	52,500	-	52,500
Total central	52,500	52,500	-	52,500
Total support services	**59,952**	**60,442**	**6,710**	**53,732**
Facilities acquisition & construction:				
Salaries and benefits	5,263	5,263	4,369	894
Materials and services	1,326,328	1,355,482	283,142	1,072,340
Total facilities acquisition and construction	**1,331,591**	**1,360,745**	**287,511**	**1,073,234**
Total current expenditures	1,421,187	1,421,187	294,221	1,126,966
Operating Contingencies	**-**	**-**	**-**	**-**
Total expenditures	1,421,187	1,421,187	294,221	1,126,966
Excess (deficit) of revenues over expenditures	(1,404,921)	(1,404,921)	(285,839)	1,119,082
OTHER FINANCING SOURCES (USES)				
Transfers out	(617)	(617)	(617)	-
Issuance of bonds	1,000,000	1,000,000	365,465	(634,535)
Premium on issuance of debt	-	-	29,574	29,574
Total other financing sources (uses)	999,383	999,383	394,422	(604,961)
Net change in fund balance	(405,538)	(405,538)	108,583	514,121
Fund balance - beginning of year	577,819	577,819	663,007	85,189
Fund balance - end of year	$ 172,281	$ 172,281	$ 771,590	$ 599,310

Note: Bolded lines indicate legally required appropriation budget levels of control

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Self-Insurance Fund
Schedule of Revenues, Expenses, and
Changes in Net Position - Budget and Actual
For the year ended June 30, 2021
(amounts expressed in thousands)

	Budgeted Amounts		Actual	Variance from Final Budget
	Original	Final	Amounts	Positive/ (Negative)
OPERATING REVENUES				
Charges for services	$ 2,094	$ 2,094	$ 1,534	$ (560)
Insurance recoveries	6	6	4	(2)
Total operating revenues	2,100	2,100	1,538	(562)
OPERATING EXPENSES				
Support services:				
Salaries and benefits	411	411	288	123
Materials and services	516	516	276	240
Claims expense	2,836	2,836	559	2,277
Total support services	**3,763**	**3,763**	**1,123**	**2,640**
Operating contingency	**4,769**	**4,769**	**-**	**4,769**
Total operating expenses	8,532	8,532	1,123	7,409
Operating income (loss)	(6,432)	(6,432)	415	6,847
NON OPERATING REVENUES				
Investment income	55	55	89	34
Federal and state support	191	191	188	(3)
Total non-operating revenues	246	246	277	31
Change in net position	(6,186)	(6,186)	692	6,878
Beginning net position - budgetary basis	6,186	6,186	5,857	(329)
Ending net position - budgetary basis	$ -	$ -	6,549	$ 6,549

Reconciliation:	
Net OPEB liability, deferred inflows, and deferred outflows	(28)
Accrued compensated absences	(49)
Net pension liability, deferred inflows, and deferred outflows	(191)
Net position - GAAP basis	$ 6,281

Note: Bolded lines indicate legally required appropriation budget levels of control

Statistical

Statistical

Oregon Symphony Cellists at Lee

First Day of Hybrid at Scott

PPS

Statistical Section

This part of the District's Annual Comprehensive Financial Report presents detailed information as a context for understanding what the information in the financial statements, note disclosures, and required supplementary information says about the District's overall financial health.

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Financial Trends (Schedules 1-4) 103
These schedules contain trend information to help the reader understand how the District's financial performance and well-being have changed over time.

Revenue Capacity (Schedules 5-9) 111
These schedules contain information to help the reader assess the District's most significant local revenue source, the property tax.

Debt Capacity (Schedules 10-12) 117
District's current levels of outstanding debt and the District's ability to issue additional debt in the future.

Demographic and Economic Information (Schedules 13-14) 121
These schedules offer demographic and economic indicators to help the reader understand the environment within which the District's financial activities take place.

Operating Information (Schedules 15-17) 123
These schedules contain service and infrastructure data to help the reader understand how the information in the District's financial report relates to the services the District provides and the activities it performs.

Sources:

Unless otherwise noted, the information in these schedules is derived from the annual comprehensive financial reports for the relevant year.

Schedule 1
SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Condensed Statement of Net Position
Last Ten Fiscal Years
(accrual basis of accounting)
(dollars in thousands)

	Government-wide Activities			
	2012	2013	2014- restated	2015
Assets				
Current and other assets	$ 180,957	$ 298,246	$ 304,224	$ 579,805
Prepaid pension & other prepaid items	425,421	414,407	2,149	5,754
Net capital assets	199,058	213,944	233,265	273,957
Total assets	805,436	926,597	539,638	859,516
Deferred Outflows of Resources				
Pension & OPEB			4,785	6,801
Liabilities				
Other current liabilities	83,977	87,185	90,983	105,763
Other long-term liabilities	57,972	182,759	244,301	495,290
Limited tax pension bonds payable	430,058	419,034	407,499	395,958
Pension	-	-	-	-
Other post employment benefits	33,595	36,263	35,579	32,900
Total liabilities	605,602	725,241	778,362	1,029,911
Deferred Inflows of Resources				
Insurance recovery		819	-	-
Pension & OPEB		-	-	11,102
		819	-	11,102
Net Assets				
Invested in capital assets, net of related debt	157,209			
Restricted	21,577			
Unrestricted	21,048			
Total Net Assets	$ 199,834			
Net Position				
Net investment in capital assets		146,148	183,584	230,251
Restricted		131,060	119,224	394,845
Unrestricted		(76,671)	(536,747)	(799,792)
Total Net Position		$ 200,537	$ (233,939)	$ (174,696)

Note: The District Implemented GASB 65 beginning in 2013. As a result, Net Assets format is presented for years prior to 2013, and Net Position format is presented for 2013 and subsequent years.

Government-wide Activities					
2016	2017-restated	2018	2019	2020	2021
$ 487,394	$ 364,732	$ 715,738	$ 590,288	$ 941,719	$ 1,092,171
1,628	1,080	884	3,377	6,200	5,098
382,401	506,612	594,103	735,002	917,372	1,173,371
871,423	872,424	1,310,725	1,328,667	1,865,291	2,270,640
3,200	163,562	173,727	207,186	158,473	249,580
121,321	181,480	278,587	298,417	298,341	328,566
453,679	359,702	591,262	467,836	854,165	1,131,855
384,075	372,249	360,172	348,223	336,062	314,159
17,185	215,080	290,058	353,090	312,349	527,419
29,933	78,390	70,784	82,302	81,319	78,581
1,006,193	1,206,901	1,590,863	1,549,868	1,882,236	2,380,580
-	-	-	-	-	-
6,062	12,845	30,419	64,329	111,145	101,191
6,062	12,845	30,419	64,329	111,145	101,191
260,146	297,914	379,871	477,058	585,214	717,881
283,176	172,880	486,336	353,527	681,328	796,976
(680,955)	(654,554)	(1,003,037)	(908,929)	(1,236,159)	(1,476,408)
$ (137,633)	$ (183,760)	$ (136,830)	$ (78,344)	$ 30,383	$ 38,449

Schedule 2
SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Changes in Net Position
Last Ten Fiscal Years
(accrual basis of accounting)
(dollars in thousands)

	Government-wide Activities			
	2012	2013	2014	2015
Expenses				
Instruction	$ 287,424	$ 267,192	$ 308,652	$ 326,935
Support services	206,856	194,270	200,750	212,213
Enterprise and community services	19,108	18,923	19,164	20,445
Facilities services	10,697	31,635	1,470	2,617
Interest and fees on long-term debt	25,748	26,813	33,546	31,600
Total expenses	549,833	538,833	563,582	593,810
Program Revenues				
Charges for services:				
Instruction	5,046	5,958	5,989	6,457
Support services	2,109	2,852	2,857	2,916
Enterprise and community services	4,422	4,123	4,420	4,214
Operating grants and contributions:				
Instruction	71,319	62,006	58,418	65,409
Support services	25,447	23,437	17,693	21,638
Enterprise and community services	2,863	2,623	2,240	2,704
Capital grants and contributions:				
Facilities services	-	-	-	-
Total program revenues	111,206	100,999	91,617	103,338
Net Expenses	(438,627)	(437,834)	(471,965)	(490,472)
General Revenues:				
Property taxes levied for general purposes	200,906	205,177	213,115	222,872
Property taxes levied for debt service	-	-	44,765	46,568
Construction excise tax	2,108	3,619	4,889	6,076
Local option taxes levied for general purposes	53,622	51,357	55,709	62,923
State School Fund - general support	149,031	151,369	184,690	179,505
State Common School Fund - general support	4,138	4,608	4,427	4,721
County and intermediate sources - general suppo	9,588	14,560	15,736	15,202
Federal Stimulus	595	6	-	-
Investment earnings	403	644	774	1,285
Other	13,535	10,518	11,253	10,563
Total general revenues	433,926	441,858	535,358	549,715
Change in Net Assets	$ (4,701)			
Change in Net Position		$ 4,024	$ 63,393	$ 59,243

Note: The District Implemented GASB 65 beginning in 2013. As a result, Net Assets format is presented for years prior to 2013, and Net Position format is presented for 2013 and subsequent years.

Government-wide Activities						
2016	2017	2018	2019	2020	2021
$ 364,964	$ 380,939	$ 421,311	$ 428,454	$ 429,149	$ 465,995
241,016	272,816	283,984	310,546	324,513	376,660
21,326	20,712	24,218	22,785	21,821	23,731
1,230	12,672	8,531	6,030	3,492	10,844
40,116	39,094	46,416	44,166	45,409	54,640
668,652	726,233	784,460	811,981	824,384	931,870
996	533	406	749	251	288
3,157	4,424	4,741	4,818	4,095	1,472
4,521	3,471	4,006	4,239	3,925	154
58,619	57,608	57,116	56,796	57,806	56,627
22,356	22,758	22,871	30,196	29,504	52,678
3,085	2,934	3,019	2,969	2,762	4,530
-	-	-	4,500	11,368	1,319
92,734	91,728	92,159	104,267	109,711	117,068
(575,918)	(634,505)	(692,301)	(707,714)	(714,673)	(814,802)
233,548	242,899	248,281	262,657	273,860	286,437
48,985	49,384	116,468	125,486	126,343	131,791
5,886	7,542	8,201	5,991	4,291	3,446
76,467	83,853	88,163	95,173	98,033	101,539
211,253	207,182	239,804	225,135	266,607	263,622
5,810	6,191	5,155	5,493	5,012	5,628
15,772	17,270	17,662	17,362	19,072	17,185
-	-	-	-	-	-
3,140	4,007	3,473	20,229	12,534	3,107
12,120	17,501	12,024	8,674	17,648	10,113
612,981	635,829	739,231	766,200	823,400	822,868
$ 37,063	$ 1,324	$ 46,930	$ 58,486	$ 108,727	$ 8,066

Schedule 3
SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Fund Balances of Governmental Funds
Last Ten Fiscal Years
(modified accrual basis of accounting)
(dollars in thousands)

	Governmental Activities			
	2012	2013	2014	2015
General Fund				
Nonspendable	$ 452	$ 139	$ 200	$ 247
Restricted	-	-	560	-
Committed	1,583	-	-	-
Assigned	-	-	-	-
Unassigned	28,890	37,318	50,914	34,195
Total general fund	30,925	37,457	51,674	34,442
All Other Governmental Funds				
Nonspendable	390	473	2,370	2,452
Restricted	27,471	144,677	127,176	393,179
Committed	20,461	15,486	16,342	17,590
Assigned	-	-	-	5,549
Unassigned	-	-	-	-
Total all other governmental funds	48,322	160,636	145,888	418,770
Total Governmental Fund Balances	$ 79,247	$ 198,093	$ 197,562	$ 453,212

Governmental Activities						
2016	2017	2018	2019	2020	2021	
$ 386	$ 360	$ 343	$ 570	$ 511	$ 945	
-	-	-	-	-	-	
-	-	-	-	-	-	
7,200	7,200	-	-	-	-	
30,249	12,544	37,939	39,317	63,963	87,746	
37,835	20,104	38,282	39,887	64,474	88,691	
2,286	1,417	1,017	3,383	6,940	5,664	
281,089	170,614	484,006	347,179	671,974	788,139	
16,400	17,454	19,116	18,185	18,921	20,246	
6,182	7,164	10,400	10,470	14,785	10,204	
-	-	-	(29)	-	(12,768)	
305,957	196,649	514,539	379,188	712,620	811,485	
$ 343,792	$ 216,753	$ 552,821	$ 419,075	$ 777,094	$ 900,176	

Schedule 4
SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Changes in Fund Balances of Governmental Funds
Last Ten Fiscal Years
(modified accrual basis of accounting)
(dollars in thousands)

	Governmental Activities			
	2012	2013	2014	2015
Revenues				
Property and other taxes	$ 200,716	$ 208,434	$ 260,872	$ 274,219
State School Fund	149,031	151,369	184,690	179,505
State Common School Fund	4,138	4,608	4,427	4,721
Federal and state support	84,704	71,942	65,231	75,793
Local option taxes	53,099	51,720	56,013	63,274
County and intermediate sources	9,588	14,560	15,736	15,201
Federal stimulus	4,591	1,920	155	-
Charges for services	45,953	48,674	51,874	54,233
Extracurricular activities	7,355	7,867	8,308	8,276
Investment earnings	579	632	757	1,255
Other	15,127	16,315	13,138	15,414
Total revenues	574,881	578,041	661,201	691,891
Expenditures				
Current:				
Instruction	305,238	303,360	323,921	349,667
Support services	207,691	193,375	202,233	229,254
Enterprise and community services	19,782	19,710	20,059	21,902
Facilities acquisition and construction	10,613	31,575	31,105	54,830
Debt Service:				
Principal	56,963	62,443	51,500	55,033
Interest and fiscal charges	25,608	26,318	34,921	33,811
Total expenditures	625,895	636,781	663,739	744,497
Excess (deficit) of revenues over expenditures	(51,014)	(58,740)	(2,538)	(52,606)
Other Financing Sources (Uses)				
Transfers in	14,090	55,786	9,013	14,409
Transfers out	(9,680)	(55,786)	(9,013)	(14,409)
Proceeds from the sale of capital assets	102	655	2,007	44
Issuance of debt, including premium/discount	27,250	176,931	-	308,212
Issuance of refunding bonds	14,400	-	-	-
Premium on issuance of debt	-	-	-	-
Payment to refunded bond escrow agent	-	-	-	-
Total other financing sources (uses)	46,162	177,586	2,007	308,256
Net change in fund balances	$ (4,852)	$ 118,846	$ (531)	$ 255,650
Debt service as a percentage of noncapital expenditures	13.4%	14.7%	13.7%	12.9%

Governmental Activities					
2016	2017	2018	2019	2020	2021
$ 287,035	$ 298,114	$ 377,578	$ 398,930	$ 403,864	$ 421,602
211,253	207,182	239,804	225,135	266,607	263,622
5,810	6,191	5,155	5,493	5,012	5,628
71,024	70,667	69,771	81,482	90,493	108,683
76,593	84,106	89,663	97,188	98,789	102,417
15,771	17,270	17,663	17,362	19,072	17,185
-	-	-	-	-	-
49,312	52,953	56,836	56,311	59,597	57,059
7,904	7,489	7,304	7,191	4,914	1,237
3,096	3,930	3,392	19,954	12,400	3,018
16,215	22,414	15,471	13,074	12,717	14,628
744,013	770,316	882,637	922,120	973,465	995,079
362,126	369,841	386,975	394,080	408,759	417,112
248,377	266,961	278,758	300,421	319,604	347,414
21,925	22,838	22,961	22,830	21,936	23,914
127,491	149,868	113,043	164,764	207,452	287,538
47,020	50,065	109,874	114,537	117,984	119,759
46,610	46,867	57,598	59,304	59,750	72,016
853,549	906,440	969,209	1,055,936	1,135,485	1,267,753
(109,536)	(136,124)	(86,572)	(133,816)	(162,020)	(272,674)
7,407	16,141	6,997	6,125	1,931	2,466
(7,407)	(16,141)	(6,997)	(6,125)	(1,931)	(2,466)
116	37	740	70	10,517	152
-	9,048	421,900	-	509,522	365,465
-	-	-	-	-	53,965
-	-	-	-	-	31,205
-	-	-	-	-	(55,031)
116	9,085	422,640	70	520,039	395,756
$ (109,420)	$ (127,039)	$ 336,068	$ (133,746)	$ 358,019	$ 123,082
12.9%	12.6%	19.7%	19.5%	19.2%	23.8%

Schedule 5
SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Assessed Values of Taxable Property within School District No. 1J Boundaries
Last Ten Fiscal Years
(dollars in thousands)

Fiscal Year Ending June 30,	Assessed Value (not including exempt property)				
	Real Property	Personal Property	Manufactured Structures	Public Utility	Total Assessed Value
2012	$ 40,421,170	$ 1,687,236	$ 41,578	$ 1,568,907	$ 43,718,891
2013	41,725,902	1,691,285	18,523	1,538,735	44,974,445
2014	43,211,127	1,716,219	17,485	1,613,794	46,558,625
2015	45,073,153	1,757,198	18,655	1,673,302	48,522,308
2016	47,216,863	1,838,347	23,782	1,710,931	50,789,923
2017	49,437,875	1,943,596	23,198	1,799,222	53,203,891
2018	52,196,539	2,009,538	22,243	1,913,350	56,141,671
2019	53,550,558	2,212,720	23,701	2,194,854	57,981,833
2020	56,156,552	2,472,239	22,330	2,177,977	60,829,098
2021	58,784,786	2,344,506	22,738	2,437,442	63,589,472

Notes

Beginning July 1, 1997 property taxes were based on an assessed value. Assessed value is defined as the lower of "maximum assessed value" or "real market value". For the 1997-1998 tax year, "maximum assessed value" was set at the 1995-1996 real market value less 10 percent. Assessed value for later years is limited to 3 percent annual increases.

The net levy is the actual imposed tax after adjustments and constitutional property tax limitations due to the passing of Measure 5 in 1990 and Measure 50 in 1997.

Source for real market values is Tax Supervising & Conservation Commisssion and Multnomah County annual reports yearly real market and assessed values by county.

Sources

FY 2012-2021: Oregon Property Tax Statistics Supplement for the appropriate fiscal year. Values are the *combined* total for the taxing district, "Portland 1J School", in Multnomah, Clackamas and Washington counties.

https://www.oregon.gov/DOR/programs/gov-research/Pages/research-property.aspx

Tax Supervising and Conservation Commission Annual Reports for the relevant fiscal year.

Add: Non-Profit Housing	Less: Urban Renewal Excess	**Total Net Assessed Value**	Total Direct Tax Rate	Amount tax rate will raise	Less: Reduction and Adjustments	**Total Taxes Imposed (Net Levy)**
$ 20,328	$ 4,519,149	**$ 39,220,070**	7.2681	$ 285,055	$ 24,051	**$ 261,004**
20,938	4,653,499	**40,341,884**	7.2681	293,209	29,814	**263,395**
21,566	4,833,326	**41,746,865**	8.3571	348,883	27,190	**321,693**
22,213	4,907,733	**43,636,788**	8.3535	364,520	23,132	**341,388**
22,880	5,237,111	**45,575,692**	8.3632	381,159	12,569	**368,590**
23,566	5,882,588	**47,344,869**	8.3304	394,402	7,687	**386,715**
21,662	6,457,719	**49,705,614**	9.6863	481,463	4,666	**476,797**
22,055	6,891,397	**51,112,491**	9.7571	498,710	3,065	**495,645**
22,459	7,148,348	**53,703,209**	9.6734	519,493	4,575	**514,918**
23,246	7,567,172	**56,045,546**	9.6698	541,949	5,578	**536,371**

Schedule 6
SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Direct and Overlapping Property Tax Rates
Last Ten Fiscal Years
(rate per $1,000 of assessed value)

	District Direct Rates			
Fiscal Year	General Tax Permanent Rate	Local Option	General Obligation Debt Service Bonds	Total Direct Tax Rate
2012	$ 5.2781	$ 1.9900	$ -	$ 7.2681
2013	5.2781	1.9900	-	7.2681
2014	5.2781	1.9900	1.0890	8.3571
2015	5.2781	1.9900	1.0854	8.3535
2016	5.2781	1.9900	1.0951	8.3632
2017	5.2781	1.9900	1.0623	8.3304
2018	5.2781	1.9900	2.4182	9.6863
2019	5.2781	1.9900	2.4890	9.7571
2020	5.2781	1.9900	2.4053	9.6734
2021	5.2781	1.9900	2.4017	9.6698

Fiscal Year	Multnomah County	Port of Portland	Metro	City of Portland	Portland Community College	Multnomah Education Service District
2012	4.3434	0.0701	0.0966	4.5770	0.2828	0.4576
2013	4.3434	0.0701	0.0966	4.5770	0.2828	0.4576
2014	4.3434	0.0701	0.0966	4.5770	0.2828	0.4576
2015	4.3434	0.0701	0.0966	4.5770	0.2828	0.4576
2016	4.3434	0.0701	0.0966	4.5770	0.2828	0.4576
2017	4.3434	0.0701	0.0966	4.5770	0.2828	0.4576
2018	4.3434	0.0701	0.0966	4.5770	0.2828	0.4576
2019	4.3434	0.0701	0.0966	4.5770	0.2828	0.4576
2020	4.3434	0.0701	0.0966	4.5770	0.2828	0.4576
2021	4.3434	0.0701	0.0966	4.5770	0.2828	0.4576

Notes

The permanent and local option tax rates are determined by the State of Oregon Constitution and State Statutes. Existing districts cannot increase their permanent rate authority. Local option levies are limited to five years for operations and ten years for capital projects. Elections for local option levies must meet the double majority election test, except in the November general election in even numbered years. Rates for debt service are set based on each year's requirements.

Sources

Tax Supervising and Conservation Commission Annual Reports for the relevant fiscal year.

Schedule 7
SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Principal Property Tax Payers for Multnomah County
Prior Year and Nine Years Ago
Taxing District - 311 Portland Public School District
(dollars in thousands)

	2020 [1]			2011		
Taxpayers with Ten Highest Taxable Assessed Values	Taxable Assessed Value	Rank	Percentage of Total Taxable Assessed Value	Taxable Assessed Value	Rank	Percentage of Total Taxable Assessed Value
Pacificorp (PP&L)	$ 483,934	1	0.90 %	$ 282,606	1	0.74 %
Portland General Electric Co	454,209	2	0.85	241,239	2	0.63
CenturyLink	299,726	3	0.56			
Weston Investment Co LLC	252,134	4	0.47	219,480	3	0.58
Port of Portland	235,786	5	0.44	210,833	4	0.55
Comcast Corporation	190,456	6	0.35	194,788	5	0.51
AT&T Inc	181,621	7	0.34			
111 SW 5th Avenue Investors LLC	172,979	8	0.32			
Capref Lloyd Center LLC	162,999	9	0.30			
AAT Lloyd District LLC	157,225	10	0.29			
Qwest Wireless				184,976	6	0.49
LC Portland LLC				173,396	7	0.45
Evraz Inc NA				166,299	8	0.44
555 SW Oak LLC				130,945	9	0.34
Fred Meyer Stores Inc				126,979	10	0.33
Subtotal of Ten Largest Taxpayers	2,591,069		4.82	1,931,541		5.06
All Other Taxpayers	51,112,140		95.18	36,189,366		94.94
Total All Taxpayers	$ 53,703,209		100.00 %	$ 38,120,907		100.00 %

Notes
[1] 2021 information not available at time of distribution

Sources
Multnomah County, Division of Assessment and Taxation

Tax Supervising and Conservation Commission Annual Reports for the relevant fiscal year.

Schedule 8
SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Principal Property Tax Payers for Multnomah County
Prior Year and Nine Years Ago
Taxing District - 170 Multnomah County
(dollars in thousands)

	2020 [1]			2011		
Taxpayers with Ten Highest Taxable Assessed Values	Taxable Assessed Value	Rank	Percentage of Total Taxable Assessed Value	Taxable Assessed Value	Rank	Percentage of Total Taxable Assessed Value
Portland General Electric Co	$ 774,111	1	0.90 %	$ 406,993	2	0.67 %
Port of Portland	678,525	2	0.79	615,232	1	1.01
Pacificorp (PP&L)	550,828	3	0.64	319,636	4	0.52
Alaska Airlines Inc	432,256	4	0.50			
Centurylink	351,537	5	0.41			
Boeing Company	343,713	6	0.40	163,001	10	0.27
Weston Investment Co LLC	290,995	7	0.34	248,199	5	0.41
Comcast Corporation	261,341	8	0.30	351,392	3	0.58
Delta Air Lines Inc	238,960	9	0.28			
Southwest Airlines Co	227,000	10	0.26			
Qwest Wireless				220,328	6	0.36
LC Portland LLC				173,396	7	0.28
Evraz Inc NA				166,299	8	0.27
Fred Meyer Stores Inc				163,369	9	0.27
Subtotal of Ten Largest Taxpayers	4,149,266		4.82	2,827,845		4.64
All Other Taxpayers	81,755,578		95.18	58,199,335		95.36
Total All Taxpayers	$ 85,904,844		100.00 %	$ 61,027,180		100.00 %

Notes
[1] 2021 information not available at time of distribution

Sources
Multnomah County, Division of Assessment and Taxation

Tax Supervising and Conservation Commission Annual Reports for the relevant fiscal year.

Schedule 9
SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Property Tax Levies and Collections
Last Ten Fiscal Years
(dollars in thousands)

Fiscal Year Ending June 30,	Net Taxes Levied for the Fiscal Year [1]	Collected within the Fiscal Year of the Levy		Collections in Subsequent Years [2]	Total Collections to Date	
		Amount	Percentage of Levy		Amount	Percentage of Levy
2012	$ 261,004	$ 244,408	93.64%	$ 7,963	$ 252,371	96.69%
2013	263,395	248,807	94.46	7,589	256,396	97.34
2014	321,693	304,458	94.64	8,421	312,879	97.26
2015	341,388	323,906	94.88	8,227	332,133	97.29
2016	368,590	350,212	95.01	6,934	357,146	96.90
2017	386,715	368,085	95.18	6,472	374,557	96.86
2018	476,797	451,059	94.60	7,044	458,103	96.08
2019	495,645	474,602	95.75	5,899	480,501	96.94
2020	514,918	490,715	95.30	4,467	495,182	96.17
2021	536,371	512,270	95.51	-	512,270	95.51

Notes

The net taxes levied are combined for Multnomah, Washington, and Clackamas counties. Responsibility for the collection of all property taxes rests within each County's Department of Assessment and Taxation. Current taxes are assessed as of July 1, become due as of November 15 and become delinquent as of May 15. Assessed taxes become a lien upon real property in the fourth year of delinquency. Proceeds of tax sales are applied to delinquent taxes, interest and other costs attributable to the property sold.

[1] The net levy is the actual imposed tax after adjustments and constitutional property tax limitations due to the passing of Measure 5 in 1990 and Measure 50 in 1997. Additional information can be found on Schedule 5. Note that the Net Taxes Levied in Schedule 5 is based on the Assessed Value, while data for this schedule is based on the actual Net Taxes Levied.

[2] Collections in subsequent years includes current year revenue received for taxes levied in prior years.

Sources

Multnomah, Washington and Clackamas Counties, Division of Assessment and Taxation

Schedule 10
SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Ratios of Outstanding Debt by Type
Last Ten Fiscal Years
(dollars in thousands, except per student and per capita)

	General Bonded Debt						
Fiscal Year	General Obligation Bonds	Less Amount Available for Repayment	Net Unamortized Premium (Discount)	Net General Obligation Bonds Outstanding	Percentage of Actual Taxable Value of Property [1]	Per Student [2]	General Obligation Debt Per Capita [4]
2012	$ -	$ -	$ -	$ -	-	$ -	$ -
2013	144,840	-	13,347	158,187	0.39%	3,329	206
2014	108,890	(361)	10,209	118,738	0.28%	2,469	153
2015	343,575	(1,363)	39,974	382,186	0.88%	7,887	484
2016	311,720	(2,698)	37,726	346,748	0.76%	7,066	433
2017	276,870	(3,301)	35,507	309,076	0.65%	6,283	383
2018	593,880	(4,229)	43,937	633,588	1.27%	12,785	780
2019	495,390	(10,552)	41,224	526,062	1.03%	10,617	647
2020	832,405	(13,568)	106,051	924,888	1.72%	18,693	N/A
2021	1,105,125	(10,482)	125,762	1,220,405	2.18%	25,794	N/A

	Other Governmental Activities Debt					
Fiscal Year	Limited Tax Pension Bonds [5]	Full Faith & Credit Obligations	Small Scale Energy Loan Programs	Recovery Zone Bond	Qualified Zone Academy Bond (QZAB)	Other Debt
2012	$ 431,638	$ 45,877	$ 325	$ 10,190	$ -	$ -
2013	419,034	14,768	179	9,356	-	471
2014	407,500	12,261	-	8,496	-	-
2015	395,958	9,970	-	7,611	-	-
2016	384,074	7,601	-	6,698	-	-
2017	372,250	10,200	-	5,757	4,000	-
2018	360,172	7,402	-	4,789	3,800	-
2019	348,222	4,503	-	3,790	3,600	-
2020	336,062	4,213	-	2,761	3,400	-
2021	314,159	3,918	-	1,700	3,200	-

Notes

Details regarding the District's outstanding debt can be found in the notes to the financial statements.

[1] See Schedule 5 for property value data. The total estimated actual value of taxable property cannot be reasonably estimated.

[2] Student enrollment data can be found in Schedule 17.

[3] Includes net general bonded debt and other governmental activities debt, excluding amounts available for repayment.

[4] Per capita is calculated using the estimated District population from the US Department of Commerce, Bureau of Economic Analysis as reported in Schedule 13. Data for 2020 and 2021 not available at time of printing.

[5] Limited Tax Pension Bonds are not included in the General Bonded Debt schedule above since they are not repaid directly with property tax dollars.

Net Unamortized Premium (Discount)	Total District [3]	Per Student [2]	Per Capita [4]
(195)	487,835	10,320	643
(202)	601,793	12,663	785
(209)	547,147	11,376	704
(198)	796,890	16,445	1,008
(187)	747,632	15,234	933
(176)	704,408	14,320	872
(165)	1,013,815	20,458	1,249
(153)	896,576	18,094	1,103
(142)	1,284,750	25,966	N/A
(131)	1,553,733	32,839	N/A

Schedule 11
SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Direct and Overlapping Governmental Activities Debt
June 30, 2021
(dollars in thousands)

Overlapping Issuer	Net Property-tax Backed Debt[1]	Percent Overlapping	Overlapping Debt [2]
Burlington Water District	$ 1,147	100.00 %	$ 1,147
City of Beaverton	33,174	1.62	538
City of Lake Oswego	85,700	4.59	3,932
City of Milwaukie	34,997	0.70	245
City of Portland	423,864	86.30	365,806
Clackamas County	125,400	0.10	122
Clackamas Cty RFPD 1	26,735	0.10	26
Clackamas Soil & Water Conservation	6,144	0.10	6
Metro	920,585	39.47	363,355
Mt Hood Community College	19,160	0.06	12
Multnomah County	690,661	75.70	522,812
Multnomah Cty RFPD 10	1,423	0.24	3
Portland Community College	545,535	49.69	271,087
Tualatin Hills Park & Rec District	61,464	1.19	730
Tualatin Valley Fire & Rescue District	17,325	1.71	296
Valley View Water District	1,233	100.00	1,233
Washington County	196,818	0.58	1,143
Subtotal, overlapping debt			1,532,493
Direct District debt (PERS) [3]			314,028
Direct District debt (other) [3]			1,239,705
Subtotal, Direct debt			1,553,733
Total direct and overlapping debt			$ 3,086,226

Notes

Overlapping governments are those that coincide, at least in part, with the geographic boundaries of the District. This schedule estimates the portion of the outstanding debt of those overlapping governments that is borne by the residents and businesses of the District. This process recognizes that, when considering the District's ability to issue and repay long-term debt, the entire debt burden borne by the residents and businesses should be taken into account. However, this does not imply that every taxpayer is a resident, and therefore responsible for repaying the debt of each overlapping government.

[1] Net Property-tax Backed Debt includes all General Obligation (GO) bonds and Limited-tax GO bonds, less self-supporting unlimited tax (GO) and self-supporting limited-tax (GO) debt.

[2] Overlapping Debt is calculated using Net Property-tax Backed Debt times Percent Overlapping that are provided by Oregon State Treasury, Debt Management Division.

[3] Direct District debt is net of unamortized premiums and discounts.

Sources

Oregon State Treasury, Debt Mangement Division: Overlapping Debt Report

Schedule 12
SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Legal Debt Margin Information
Last Ten Fiscal Years
(dollars in thousands)

Legal Debt Margin Calculation for Fiscal Year 2021

Real Market Value	$ 140,249,375
Debt Limit (7.95% of Real Market Value) [1]	$ 11,149,825
Amount of Debt Applicable to Debt Limit:	
General Obligation Bonded Debt	1,230,887
Less: Amount Available in Debt Service Funds	(10,482)
Amount of Debt Applicable to Debt Limit	1,220,405
Legal Debt Margin	$ 9,929,420

	Debt Limit	Total net debt applicable to limit	Legal debt margin	Total net debt applicable to the limit as a percentage of debt limit
2012	$ 5,680,406	$ -	$ 5,680,406	0.00%
2013	5,604,461	158,187	5,446,274	2.82
2014	5,917,214	118,738	5,798,476	2.01
2015	6,517,491	382,186	6,135,305	5.86
2016	7,228,979	346,748	6,882,231	4.80
2017	8,501,342	309,076	8,192,266	3.64
2018	9,670,978	633,588	9,037,390	6.55
2019	10,472,898	526,062	9,946,836	5.02
2020	10,698,745	924,888	9,773,857	8.64
2021	11,149,825	1,220,405	9,929,420	10.95

Allowable Percentage of Real Market Value:	
[A] Kindergarten through eighth grade, 9 x .0055	4.95%
[B] Ninth through twelfth, 4 x .0075	3.00%
Allowable Percentage	7.95% [1]

Notes

[1] ORS 328.245 establishes a parameter of bonded indebtedness for school districts. Aggregates are governed by real market values within the District based on the following:

[A] For each grade from kindergarten to eighth for which the District operates schools, fifty-five one-hundredths of one percent (.0055) of the real market value.

[B] For each grade from ninth to twelfth for which the District operates schools, seventy-five one-hundredths of one percent (.0075) of the real market value.

Sources

Tax Supervising and Conservation Commission Annual Reports for the relevant fiscal year

Schedule 13
SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Demographic and Economic Statistics
Last Ten Calendar Years
Multnomah County

Year	Population	Personal Income (thousands of dollars)	Per Capita Personal Income (dollars)	Unemployment Rate[2]
2012	759,256	$ 32,715,802	$ 43,089	8.9 %
2013	766,135	33,376,029	43,564	7.9
2014	776,712	36,588,018	47,106	6.8
2015	790,294	38,906,295	49,230	5.7
2016	801,539	41,735,341	52,069	4.9
2017	807,555	43,873,915	54,329	4.1
2018	811,880	46,966,887	57,850	4.0
2019	812,855	49,399,774	60,773	4.0
2020	- [1]	- [1]	- [1]	11.6
2021	- [1]	- [1]	- [1]	5.6

Notes

[1] Data for 2020 and 2021 not available at time of printing.

[2] Oregon unemployment rates as of June 30 each year.

Sources

US Department of Commerce, Bureau of Economic Analysis: population, personal income and per capita information.

US Department of Labor, Bureau of Labor Statistics: unemployment rate information.

Schedule 14
SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Principal Employers for the Portland Metro Area
Current Year and Nine Years Ago

	2021			2012		
Employer	Employees	Rank	Percentage of Total Employment	Employees	Rank	Percentage of Total Employment
Ten Largest Employers						
Intel	21,394	1	1.82 %	15,636	2	1.55 %
Providence Health & Services	19,326	2	1.65	14,089	3	1.40
Oregon Health & Science University	17,441	3	1.49	12,000	5	1.19
Legacy Health	12,896	4	1.10	9,732	7	0.96
Nike Inc	12,000	5	1.02	7,000	10	0.69
Kaiser Permanente	11,910	6	1.01	9,039	8	0.90
Fred Meyer Stores	8,163	7	0.70	9,858	6	0.98
City of Portland	7,409	8	0.63	8,876	9	0.88
Portland Public Schools	7,005	9	0.60			
Beaverton School District	5,646	10	0.48			
State of Oregon				18,400	1	1.82
US Federal Government				13,900	4	1.38
Subtotal of Ten Largest Employers	123,190		10.50	118,530		11.75
All Other Employers	1,050,510		89.50	890,670		88.25
Total Portland MSA[1] Employment	1,173,700 [2]		100.00 %	1,009,200		100.00 %

Notes

[1] Portland-Vancouver-Hillsboro MSA includes Clackamas, Columbia, Multnomah, Washington, and Yamhill counties in Oregon, and Clark and Skamania counties in Washington.

[2] As of June 2021, not seasonally adjusted.

Sources

Portland Business Journal, Book of Lists, published December 2011 and December 2020

Oregon Employment Department, Workforce and Economic Research

Schedule 15
SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Full-time Equivalent District Employees by Assignment/Function
Last Ten Fiscal Years

	Full-time Equivalent Employees for the Fiscal Year			
Assignment/Function	2012	2013	2014	2015
Teachers	2,315.0	2,353.1	2,384.0	2,606.8
Educational Assistants	555.8	520.9	509.8	582.1
School Level Administration	142.9	144.2	142.3	155.0
District Level Administration [1]	13.0	14.0	11.0	17.0
Other Staff	1,850.3	1,798.4	1,720.0	2,056.5
Total FTE	4,877.0	4,830.6	4,767.1	5,417.4

Notes

[1] Beginning in fiscal year 2020, Special Education staff previously shown as District Level Administration were reclassified to School Level Administration

Sources

Internal: System Planning and Performance - Analytics

2016	2017	2018	2019	2020	2021
2,632.5	2,737.7	2,684.2	2,697.3	2,709.3	2,749.2
667.8	674.3	680.8	647.1	688.5	640.1
151.0	166.5	167.3	165.5	172.5	174.5
22.0	21.0	19.2	16.0	4.0	4.0
1,959.4	2,123.1	2,275.2	2,048.1	2,234.4	2,330.2
5,432.7	5,722.6	5,826.7	5,574.0	5,808.7	5,898.0

Schedule 16
SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Meal and Transportation Services Provided
Last Ten Fiscal Years

	2012		2013		2014		2015	
Nutrition Services								
Number of Meals Served[1]								
Paid Meals	1,382,329	25%	1,354,685	25%	1,313,005	25%	1,071,048	19%
Reduced Meals	441,829	8%	434,353	8%	375,796	7%	194,558	4%
Free Meals	3,689,643	67%	3,632,901	67%	3,560,251	68%	4,315,732	77%
Total meals served	5,513,801	100%	5,421,939	100%	5,249,052	100%	5,581,338	100%
Average Daily Breakfast Served	10,400		10,768		10,380		10,846	
Average Daily Lunch Served	19,942		19,059		18,668		19,710	
Student Participation[2]	49.14%		47.00%		45.80%		44.00%	
Transportation								
Number of buses	257		263		254		269	
Total miles traveled	3,019,548		3,392,622		3,156,795		3,127,505	
Cost per mile	$ 6.24		$ 5.28		$ 5.89		$ 5.97	
Area encompased by District (sq mi)	160		160		160		160	

	2016		2017		2018		2019	
Nutrition Services								
Number of Meals Served[1]								
Paid Meals	1,114,504	20%	1,372,455	29%	1,466,345	32%	1,621,312	34%
Reduced Meals	209,753	4%	180,707	4%	261,833	6%	292,962	6%
Free Meals	4,141,824	76%	3,225,700	67%	2,877,750	62%	2,877,464	60%
Total meals served	5,466,081	100%	4,778,862	100%	$ 4,605,928	100%	$ 4,791,738	100%
Average Daily Breakfast Served	10,724		9,831		8,985		9,010	
Average Daily Lunch Served	19,083		18,173		17,793		17,356	
Student Participation[2]	44.40%		42.00%		38.67%		37.78%	
Transportation								
Number of buses	245		260		270		270	
Total miles traveled	3,273,739		4,174,150		3,506,305		3,587,525	
Cost per mile	$ 5.91		$ 4.88		$ 6.69		$ 7.51	
Area encompased by District (sq mi)	160		160		160		160	

	2020		2021	
Nutrition Services				
Number of Meals Served[1]				
Paid Meals [3]	1,191,926	29%	-	0%
Reduced Meals [3]	199,756	5%	-	0%
Free Meals	2,767,579	66%	4,370,010	100%
Total meals served	4,159,261	100%	4,370,010	100%
Average Daily Breakfast Served	8,192		5,316	
Average Daily Lunch Served	13,830		5,332	
Student Participation[2]	37.36%		12.76%	
Transportation				
Number of buses	257		289	
Total miles traveled [4]	2,993,965		851,568	
Cost per mile	$ 8.62		$ 26.57	
Area encompased by District (sq mi)	160		160	

Notes

[1] Number of meals served includes breakfast, lunch, snack, and supper.

[2] Student Participation percentage is calculated based on the average daily lunches served at elementary schools, middle schools, and high schools, over the average daily attendance (enrollment adjusted per industry factors) at the schools where nutrition services meals are served.

[3] Per USDA guidance, free meals were available to all students during the 2021-2022 school year.

[4] Due to COVID and Comprehensive Distance Learning, fewer students were transported to school sites during the 2021-2022 school year.

Sources

Internal: District Nutrition Services and Transportation departments

PPS

Schedule 17
SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
School Building and Student Enrollment Information
Last Ten Fiscal Years

	BUILDING												
School or Program Type	Year	Age	Square Footage	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Abernethy	1924	97	45,464	455	505	528	511	513	519	516	520	507	451
Ainsworth	1912	109	53,483	568	569	576	582	600	605	638	625	644	594
Alameda	1921	100	72,748	782	769	773	760	730	747	734	730	704	623
Arleta	1929	92	98,245	422	462	476	454	456	457	454	490	526	485
Astor	1949	72	29,472	482	478	500	497	493	455	425	434	416	394
Atkinson	1953	68	53,170	447	440	441	428	435	432	420	419	391	390
Beach	1928	93	82,155	582	613	620	607	631	464	442	428	436	382
Beverly Cleary	1959	62	96,900	674	730	814	834	859	884	897	782	742	692
Boise-Eliot / Humboldt	1926	95	93,629	389	535	506	540	540	532	499	325	343	334
Bridger	1951	70	75,786	396	405	435	415	476	500	531	504	516	514
Bridlemile	1956	65	54,157	472	457	450	442	480	511	535	518	508	437
Buckman	1922	99	99,875	488	460	452	444	481	459	474	450	427	446
Capitol Hill	1917	104	49,621	371	403	405	460	437	448	442	443	416	346
César Chávez	1928	93	104,371	-	473	483	451	522	551	540	550	549	544
Chapman	1923	98	78,102	562	592	646	674	643	584	532	484	484	375
Chief Joseph	1948	73	43,215	481	459	642	627	604	326	363	358	351	305
Creative Science School Program	1955	66	48,651	356	388	425	444	476	492	479	466	468	450
Creston	1948	73	77,144	380	345	350	350	392	356	372	361	375	385
Duniway	1926	95	104,760	425	423	437	505	494	519	499	504	512	468
Faubion	2017	4	133,576	434	454	487	511	479	532	710	767	786	740
Forest Park	1998	23	59,634	491	502	490	486	449	455	443	418	402	348
Glencoe	1923	98	61,457	453	472	502	503	500	492	489	451	449	395
Grout	1927	94	87,080	359	371	377	389	376	384	392	382	370	350
Harrison Park	1955	66	107,735	751	757	742	742	729	676	638	658	637	601
Hayhurst	1954	67	48,918	420	412	415	484	499	552	592	629	640	624
Humboldt				219	-	-	-	-	-	-	-	-	-
Irvington	1932	89	67,340	483	460	478	485	493	446	459	339	325	320
James John	1929	92	67,638	402	439	461	445	429	405	368	347	351	316
Kelly	1952	69	75,233	570	626	622	631	610	604	532	498	476	419
King	1925	96	153,475	292	312	331	370	400	386	389	321	341	324
Laurelhurst	1923	98	56,555	684	665	673	671	691	684	698	692	698	688
Lee	1952	69	61,161	459	497	493	431	456	447	425	276	269	262
Lent	1948	73	73,479	577	573	604	560	564	523	530	507	475	476
Lewis	1952	69	45,745	393	400	414	382	382	412	389	390	410	368
Llewellyn	1928	93	74,326	543	583	570	518	531	517	489	484	509	460
Maplewood	1948	73	37,713	335	327	333	329	359	384	378	383	374	347
Markham	1950	71	76,805	384	383	393	386	377	418	456	445	430	416
Marysville	1921	100	51,553	363	352	416	405	390	381	403	392	383	402
Ockley Green				269	243	-	-	-	-	-	-	-	-
Peninsula	1952	69	59,957	358	368	376	396	374	266	279	267	265	237
Richmond	1908	113	82,254	662	662	687	677	629	649	647	632	627	600
Rieke	1959	62	32,886	416	388	388	388	402	410	386	379	368	329
Rigler	1931	90	78,199	524	449	463	480	451	472	441	308	307	268
Rosa Parks	2006	15	65,697	407	405	405	341	329	298	272	276	280	266
Rose City Park	2018	3	69,082	-	-	-	-	-	-	-	532	538	529
Roseway Heights				589	616	606	668	697	643	661	-	-	-
Sabin	1927	94	66,567	392	420	485	514	568	524	551	452	418	360
Scott	1949	72	65,425	521	504	507	481	473	512	521	459	485	460
Sitton	1949	72	57,289	333	356	376	399	390	401	364	367	374	337
Skyline	1939	82	35,760	276	273	265	309	300	300	293	274	248	181
Stephenson	1964	57	39,652	335	329	320	308	322	340	352	347	371	322
Sunnyside Environmental	1925	96	76,671	608	605	587	586	574	602	604	581	549	522
Vernon	1931	90	88,010	500	440	394	386	407	471	522	545	607	569
Vestal	1929	92	111,481	420	395	402	399	412	381	341	272	249	228
Whitman	1954	67	55,559	361	351	349	316	271	287	283	254	220	185
Winterhaven	1930	91	61,453	346	352	356	346	350	353	354	321	299	291
Woodlawn	1926	95	99,840	443	439	449	443	426	342	346	354	327	315
Woodmere	1954	67	50,130	397	383	371	338	312	303	286	310	273	269
Woodstock	1955	66	63,752	491	508	505	487	496	527	552	548	543	526
Elementary Schools Total			3,960,035	25,992	26,577	27,051	27,015	27,159	26,620	26,627	25,248	24,988	23,265

Schedule 17
SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
School Building and Student Enrollment Information
Last Ten Fiscal Years (continued)

	BUILDING											
School or Program Type	Year	Age	Square Footage	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Beaumont	1926	95	81,381	481	583	584	554	571	569	591	571	573	518
César Chávez				453	-	-	-	-	-	-	-	-	-
da Vinci	1928	93	72,063	462	470	468	465	458	461	457	456	450	443
George	1950	71	85,038	360	385	373	359	369	360	417	421	438	432
Gray	1951	70	82,744	422	422	464	527	566	546	536	542	566	509
Harriett Tubman	1952	69	83,673	-	-	-	-	-	-	-	491	430	443
Hosford	1925	96	74,964	534	538	576	591	640	631	621	588	651	676
Jackson	1964	57	218,118	533	532	533	548	606	597	659	746	793	803
Lane	1926	95	79,824	441	486	505	471	481	443	454	433	432	416
Mt. Tabor	1952	69	84,785	593	606	628	662	694	730	718	741	724	721
Ockley Green	1925	96	66,338	-	-	-	-	-	626	531	505	487	487
Roseway Heights	1921	100	99,825	-	-	-	-	-	-	-	588	614	617
Sellwood	1913	108	81,470	486	455	483	545	560	583	589	612	588	549
West Sylvan	1953	68	96,171	848	888	945	958	966	911	876	822	833	802
Middle Schools Total			1,206,394	5,613	5,365	5,559	5,680	5,911	6,457	6,449	7,516	7,579	7,416
Benson	1917	104	412,855	889	889	830	879	914	994	1,026	1,035	1,055	1,005
Cleveland	1929	92	346,093	1,520	1,532	1,523	1,516	1,600	1,609	1,586	1,651	1,560	1,581
Franklin	1915	106	285,547	1,480	1,469	1,460	1,552	1,570	1,612	1,745	1,856	1,936	2,010
Grant	1923	98	303,271	1,565	1,536	1,486	1,503	1,481	1,476	1,512	1,638	1,813	1,965
Ida B. Wells-Barnett [3]	1954	67	283,586	1,387	1,236	1,230	1,257	1,324	1,413	1,512	1,535	1,558	1,540
Jefferson	1909	112	299,416	584	441	511	493	524	590	677	656	641	620
Lincoln	1950	71	194,457	1,476	1,513	1,565	1,583	1,696	1,703	1,705	1,698	1,588	1,481
Leodis V McDaniel [2]	1955	66	317,836	1,161	1,107	1,066	1,077	1,134	1,070	1,146	1,157	1,079	1,173
Marshall	1959	62	283,343		-	-	-	-	-	-	-	-	-
Roosevelt	1921	100	255,025	748	828	914	947	940	881	859	994	1,195	1,292
High Schools Total			2,981,429	10,810	10,551	10,585	10,807	11,183	11,348	11,768	12,220	12,425	12,667
PPS Alternative Programs Total			302,529	1,689	1,739	1,699	1,716	1,817	1,760	1,659	1,631	1,632	1,243
School and Alternative Programs Total			8,450,387	44,104	44,232	44,894	45,218	46,070	46,185	46,503	46,615	46,624	44,591
Community-Based Alternative Programs Total			-	1,150	1,207	1,055	1,034	964	968	1,035	912	973	872
Special Services Total			89,443	502	457	485	443	451	451	455	529	496	408
Public Charter Schools Total			16,755	1,532	1,627	1,664	1,764	1,590	1,585	1,564	1,494	1,385	1,443
Total All			8,556,585	47,288	47,523	48,098	48,459	49,075	49,189	49,557	49,550	49,478	47,314

Enrollment and Square Footage Summary by Category	Square Footage	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Regular Programs											
Elementary Schools	3,960,035	25,992	26,577	27,051	27,015	27,159	26,620	26,627	25,248	24,988	23,265
Middle Schools	1,206,394	5,613	5,365	5,559	5,680	5,911	6,457	6,449	7,516	7,579	7,416
High Schools	2,981,429	10,810	10,551	10,585	10,807	11,183	11,348	11,768	12,220	12,425	12,667
PPS Alternative Programs	302,529	1,689	1,739	1,699	1,716	1,817	1,760	1,659	1,631	1,632	1,243
Plus enrollment not normally within PPS facilities:											
Community Based Programs	-	1,150	1,207	1,055	1,034	964	968	1,035	912	973	872
Special Services	89,443	502	457	485	443	451	451	455	529	496	408
Public Charter Programs	16,755	1,532	1,627	1,664	1,764	1,590	1,585	1,564	1,494	1,385	1,443
Other or vacant facilities	1,156,926										
	9,713,511	47,288	47,523	48,098	48,459	49,075	49,189	49,557	49,550	49,478	47,314

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
ADMw [4]	53,250	53,693	54,281	54,986	57,491	57,876	57,779	57,823	57,624	57,825

Age of Buildings	Median	Newest
Elementary Schools	78	3
Middle Schools	93	57
High Schools	95	62
Focus/Alternative Schools	88	68
Inactive or Other Facilities	63	43

[1] Enrollment counts are compiled on or about the first school day in October. An enrolled student is defined as a student who attends one or more schools or programs within the District. Regardless of the number of schools or programs attended, each student is counted only once; the counts are unduplicated.

[2] Madison was renamed Leodis V. McDaniel in fiscal year 2021

[3] Wilson was renamed Ida B.Wells-Barnett in fiscal year 2021

[4] Weighted Average Daily Membership ("ADMw") is the enrollment figure, adjusted for part-time students and students with special needs, that is used to allocate revenues appropriated by the State to school districts. The most recent two years are preliminary data.

Audit

Audit

Governor Brown Visits Sitton

Jefferson Graduation

INDEPENDENT AUDITOR'S REPORT
REQUIRED BY OREGON STATE REGULATIONS

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INDEPENDENT AUDITOR'S REPORT ON COMPLIANCE AND INTERNAL CONTROL OVER FINANCIAL REPORTING BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH OREGON STATE REGULATIONS

Board of Education
School District No. 1J, Multnomah County, Oregon
Portland, Oregon

We have audited the financial statements of the governmental activities, each major fund, and the aggregate remaining fund information of School District No. 1J, Multnomah County, Oregon (the District), as of and for the year ended June 30, 2021, and the related notes to the financial statements, which collectively comprise the District's basic financial statements, and have issued our report thereon dated December 3, 2021. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States.

COMPLIANCE

As part of obtaining reasonable assurance about whether the District's financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grants, including the provisions of Oregon Revised Statutes as specified in Oregon Administrative Rules 162-10-000 through 162-10-330 of the *Minimum Standards for Audits of Oregon Municipal Corporations*, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion.

We performed procedures to the extent we considered necessary to address the required comments and disclosures which included, but were not limited to the following:

- Deposit of public funds with financial institutions (ORS Chapter 295).
- Indebtedness limitations, restrictions and repayment.
- Budgets legally required (ORS Chapter 294).
- Insurance and fidelity bonds in force or required by law.
- Programs funded from outside sources.
- Authorized investment of surplus funds (ORS Chapter 294).
- Public contracts and purchasing (ORS Chapters 279A, 279B, 279C).
- State school fund factors and calculation.
- Public charter school requirements

In connection with our testing, nothing came to our attention that caused us to believe the District was not in substantial compliance with certain provisions of laws, regulations, contracts, and grants, including the provisions of Oregon Revised Statutes as specified in Oregon Administrative Rules 162-10-000 through 162-10-330 of the *Minimum Standards for Audits of Oregon Municipal Corporations* except as follows:

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COMPLIANCE (Continued)

- In our test sample of 60 students with more than 10 absences, there were two students with ten or more consecutive absences who were not withdrawn from ADM as required by State rules.

- In our test sample of 60 teachers, supporting documentation could not be provided for the years of experience prior to the year 2000 for four teachers. In addition, the District misreported years of experience for two other teachers.

INTERNAL CONTROL OVER FINANCIAL REPORTING

In planning and performing our audit of the financial statements, we considered the District's internal control over financial reporting to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the District's internal control. Accordingly, we do not express an opinion on the effectiveness of the District's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees in the normal course of performing their assigned functions, to prevent, or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency, or combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies and therefore material weaknesses or significant deficiencies may exist that have not been identified. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses.

PURPOSE OF THIS REPORT

This report is intended solely for the information and use of the Board of Education, Oregon Secretary of State Audits Division, and management and is not intended to be and should not be used by anyone other than these specified parties.

Talbot, Korvola & Warwick LLP

Portland, Oregon
December 3, 2021

Portland Public Schools Nondiscrimination Statement

Portland Public Schools recognizes the diversity and worth of all individuals and groups and their roles in society. The District prohibits discrimination and harassment on any basis protected by law, including but not limited to, an individual's perceived or actual race, color, religion, sex, sexual orientation, gender expression or identity, national or ethnic origin, marital status, age, mental or physical disability, pregnancy, familiar status, economic status, veteran's status, or because of the perceived or actual race, color, religion, sex, sexual orientation, national or ethnci origin, marital status, age, mental or physical disability, pregnancy, familiar status, economic status, or veterans' status or any other persons with whom the individual associates.

Board of Education Policy 1.80.020-P

Contact Information for Civil Rights Matters

District Title VI:	Angie Morrill	Phone: 503-916-6499 x71112
District Title IX:	Liane O'Banion	Phone: 503-916-3025
District 504:	James Loveland	Phone: 503-916-2000 x71041
American Disabilities Act:	Human Resources	Phone: 503-916-3544

2020-21 ACFR Preparation

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Nolberto Delgadillo, Chief Financial Officer

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Cheryl Anselone, Sr. Manager
Ashley Finch, Sr. General Ledger Manager
Darwin Dittmar, Sr. Bond Accountant
Premila Kumar, Sr. Accountant/Analyst
Abdullah Elmadhoun, Accountant/Analyst
Chad Hepner, Bond Accountant
Colene Pool, Fiscal Services Associate II

Budget & Grant Accounting
Nicole Bassen, Budget Director
Junho Chang, Budget Systems Manager
Melissa Ensminger, Sr. Budget & Grant Accounting Manager
Stacey Hoang, Sr. Budget Analyst
Kristin Johnson, Sr. Accountant/Analyst
Michael Johnson, Sr. Accountant/Analyst
Aaron Musk, Sr. Accountant/Analyst
Zeb Petterborg, Sr. Accountant/Analyst
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Matthew Howe, Financial Systems Analyst

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Megan Gremer, Payroll System Manager
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Marina Vlasenko, Financial Services Associate III
James Young, Financial Services Associate III
Deborah Finzo, Fiscal Services Clerk

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Michael Nixon, Sr. Treasury Manager
Jill Bellone, Accountant/Analyst
Teresa Eckblad, Finance Clerk

Accounts Payable
Rebecca Dingman, Accounts Payable Manager
Joy Beach, Fiscal Services Associate II
Jamie Farrington, Fiscal Services Associate II
Shawna Geer, Fiscal Services Associate II
Suzanne Rademacher, Fiscal Services Associate II
Gretta Robert, Fiscal Services Associate II

School District No. 1J, Multnomah County, Oregon

PORTLAND PUBLIC SCHOOLS

REPORT ON REQUIREMENTS FOR FEDERAL AWARDS (UNIFORM GUIDANCE)

For the year ended June 30, 2021

Portland Public Schools

Report on Requirements for Federal Awards (Uniform Guidance)

For the year ended June 30, 2021

School District No. 1J, Multnomah County, Oregon

Portland, Oregon

Prepared by the Finance Department

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School District No. 1J,
Multnomah County, Oregon
Portland Public Schools

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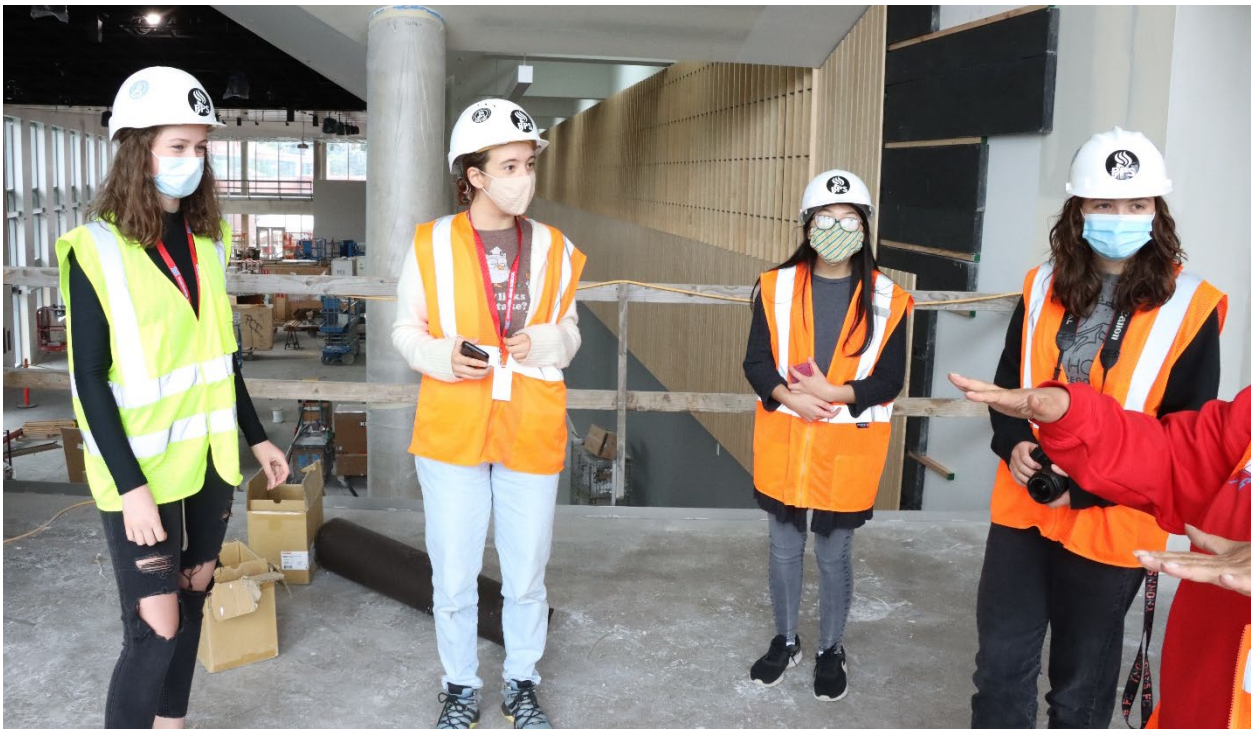

McDaniel High School Site Student Tour

Lane Middle School 1st Day

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REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH *GOVERNMENT AUDITING STANDARDS*

INDEPENDENT AUDITOR'S REPORT

Board of Education
School District No. 1J, Multnomah County, Oregon
Portland, Oregon

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of the governmental activities, each major fund, and the aggregate remaining fund information of School District No. 1J, Multnomah County, Oregon (the District), as of and for the year ended June 30, 2021, and the related notes to the financial statements, which collectively comprise the District's basic financial statements, and have issued our report thereon dated December 3, 2021.

INTERNAL CONTROL OVER FINANCIAL REPORTING

In planning and performing our audit of the financial statements, we considered the District's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the District's internal control. Accordingly, we do not express an opinion on the effectiveness of the District's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control such that there is a reasonable possibility that a material misstatement of the District's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

COMPLIANCE AND OTHER MATTERS

As part of obtaining reasonable assurance about whether the District's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an

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COMPLIANCE AND OTHER MATTERS (Continued)

objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

PURPOSE OF THIS REPORT

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the District's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the District's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Talbot, Korvola & Warwick LLP

Portland, Oregon
December 3, 2021

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REPORT ON COMPLIANCE FOR EACH MAJOR FEDERAL PROGRAM; REPORT ON INTERNAL CONTROL OVER COMPLIANCE; AND REPORT ON SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS REQUIRED BY THE UNIFORM GUIDANCE

INDEPENDENT AUDITOR'S REPORT

Board of Education
School District No. 1J, Multnomah County, Oregon
Portland, Oregon

REPORT ON COMPLIANCE FOR EACH MAJOR FEDERAL PROGRAM

We have audited School District No. 1J, Multnomah County, Oregon (the District's) compliance with the types of compliance requirements described in the *OMB Compliance Supplement* that could have a direct and material effect on each of the District's major federal programs for the year ended June 30, 2021. The District's major federal programs are identified in the Summary of Independent Auditor's Results Section of the accompanying Schedule of Findings and Questioned Costs.

MANAGEMENT'S RESPONSIBILITY

Management is responsible for compliance with federal statutes, regulations, and the terms and conditions of its federal awards applicable to its federal programs.

AUDITOR'S RESPONSIBILITY

Our responsibility is to express an opinion on compliance for each of the District's major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Those standards and the Uniform Guidance require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about the District's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination of the District's compliance.

OPINION ON EACH MAJOR FEDERAL PROGRAM

In our opinion, the District complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2021.

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REPORT ON INTERNAL CONTROL OVER COMPLIANCE

Management of the District is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered the District's internal control over compliance with the types of requirements that could have a direct and material effect on each major federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of the District's internal control over compliance.

A *deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

REPORT ON SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS REQUIRED BY THE UNIFORM GUIDANCE

We have audited the financial statements of the governmental activities, each major fund, and the aggregate remaining fund information of the District as of and for the year ended June 30, 2021, and the related notes to the financial statements, which collectively comprise the District's basic financial statements. We issued our report thereon dated December 3, 2021, which contained unmodified opinions on those financial statements. Our audit was conducted for the purpose of forming opinions on the financial statements as a whole. The accompanying Schedule of Expenditures of Federal Awards is presented for purposes of additional analysis as required by the Uniform Guidance and is not a required part of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. The information has been subjected to the

REPORT ON SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS REQUIRED BY THE UNIFORM GUIDANCE (Continued)

auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the Schedule of Expenditures of Federal Awards is fairly stated in all material respects in relation to the basic financial statements as a whole.

Talbot, Korvola & Warwick LLP

Portland, Oregon
December 3, 2021

PPS

Sacajawea Head Start 1st Day

Benson High School 1st Day

PPS

SCHOOL DISTRICT NO. 1J, MULTNOMAH COUNTY, OREGON
Schedule of Expenditures of Federal Awards
For the year ended June 30, 2021

CFDA/ Grant	Grant Description	Pass-Through Grantor's No.	Period Covered	Direct or Pass-Thru	Award Amount	Expenditures	Agency Total
Department of Agriculture							
	Food and Nutrition Service						
	Child Nutrition Cluster						
10.555	***National School Lunch Program***						
202	Donated Foods		07/01/20-06/30/21	Pass-Thru		1,178,055 [1]	
10.559	***Summer Food Service Program for Children***						
202	Donated Foods		07/01/20-06/30/21	Pass-Thru		7,032 [1]	
202	Summer Food Service Program for Children	N/A	07/01/20-06/30/21	Pass-Thru		12,399,027	
						12,406,059	
			Total Child Nutrition Cluster			**13,584,114**	
10.558	***Child and Adult Care Food Program***						
202	Child and Adult Care Food Program	N/A	07/01/20-06/30/21	Pass-Thru		2,448,057	
10.582	***Fresh Fruit and Vegetable Program***						
202	Fresh Fruit and Vegetable Grants	Multiple	07/01/20-06/30/21	Pass-Thru		132,378	
			Pass-Thru from Oregon Department of Education			16,164,549	
Department of Agriculture Total							**16,164,549**
Department of Defense							
	National Security Agency						
12.900	***Language Grant Program***						
G1989	StarTalk	H98230-20-1-0180	05/01/20-03/31/22	Direct	130,000	59,066	
						59,066	
				Direct Funding		59,066	
Department of Defense Total							**59,066**
National Science Foundation							
47.076	***Education and Human Resources***						
G1477	Cornell Lab of Ornithology AISL Award	N/A	11/01/14-09/30/21	Pass-Thru	70,000	9,679	
G1923	Developing Leaders, Transforming Practice	1906565	09/01/19-08/31/23	Direct	1,088,014	24,785	
						34,464	
				Direct Funding		24,785	
				Pass-Thru from Cornell University		9,679	
National Science Foundation Total							**34,464**
Department of Education							
	Office of Career, Technical, and Adult Education						
84.048	***Career and Technical Education - Basic Grants to States***						
G1875	Carl Perkins 19/20	52503	07/01/19-09/30/20	Pass-Thru	318,732	132,154	
G2011	Carl Perkins 20/21	57597	07/01/20-09/30/21	Pass-Thru	409,875	301,188	
						433,342	
84.051	***Career and Technical Education - National Programs***						
G1928	Perkins Innovation	V051F190033	10/01/19-09/30/21	Direct	500,000	186,730	

See accompanying Notes to Schedule of Expenditures of Federal Awards

SCHOOL DISTRICT NO. 1J, MULTNOMAH COUNTY, OREGON
Schedule of Expenditures of Federal Awards
For the year ended June 30, 2021

CFDA/ Grant	Grant Description	Pass-Through Grantor's No.	Period Covered	Direct or Pass-Thru	Award Amount	Expenditures	Agency Total
Department of Education (Continued)							
	Office of Elementary and Secondary Education						
84.010	***Title I Grants to Local Educational Agencies***						
G1796	ESSA D&SI PPD Phase I	51443	09/30/18-09/30/20	Pass-Thru	46,013	46,013	
G1797	ESSA D&SI PPD Phase II	51462	09/30/18-09/30/20	Pass-Thru	92,026	92,026	
G1798	ESSA D&SI PPD Phase III	51482	09/30/18-09/30/20	Pass-Thru	782,220	84,364	
G1867	Title IA - School Budgets	53350	07/01/19-09/30/21	Pass-Thru	4,319,465	389,395	
G1868	Title IA - Central	53350	07/01/19-09/30/21	Pass-Thru	5,266,024	1,821,619	
G1869	Title IA - Focus/Priority	53350	07/01/19-09/30/21	Pass-Thru	500,000	37,524	
G1873	Title ID	53909	07/01/19-09/30/21	Pass-Thru	303,206	48,211	
G1972	ESSA Partnerships TB 19/20	54281	07/01/19-09/30/21	Pass-Thru	1,055,000	571,901	
G1990	Title IA - School Budgets	58346	07/01/20-09/30/21	Pass-Thru	5,852,324	4,156,764	
G1991	Title IA - Central	58346	07/01/20-09/30/21	Pass-Thru	3,190,619	2,328,218	
G1992	Title IA - Focus/Priority	58346	07/01/20-09/30/21	Pass-Thru	922,175	181,122	
G1996	Title ID	58907	07/01/20-09/30/21	Pass-Thru	225,452	170,116	
G2004	ESSA Partnerships TB 20/21	60419	07/01/20-09/30/21	Pass-Thru	970,600	18,329	
						9,945,602	
84.011	***Migrant Education State Grant Program***						
G1870	Title IC - Migrant Education	53728	07/01/19-09/30/20	Pass-Thru	394,308	27,393	
G1871	Title IC - Migrant Education Preschool	53743	07/01/19-09/30/20	Pass-Thru	14,736	6,851	
G1872	Title IC - Migrant Education Summer	57321	04/01/20-09/30/20	Pass-Thru	99,305	46,605	
G1993	Title IC - Migrant Education	58942	07/01/20-09/30/21	Pass-Thru	468,536	409,573	
G1994	Title IC - Migrant Education Preschool	58924	07/01/20-09/30/21	Pass-Thru	14,265	5,421	
G1995	Title IC - Migrant Education Summer	66116	04/01/21-09/30/21	Pass-Thru	127,669	38,002	
						533,845	
84.013	***Title I State Agency Program for Neglected and Delinquent Children and Youth***						
G1793	Title ID - Portland DART Schools	12305	07/01/19-06/30/21	Pass-Thru	145,200	263,099	
84.060	***Indian Education Grants to Local Educational Agencies***						
G2002	Indian Education	S060A200938	07/01/20-06/30/21	Direct	111,581	105,731	
84.196	***Education for Homeless Children and Youth***						
G2003	McKinney-Vento Homeless Education	65242	07/01/20-09/30/21	Pass-Thru	61,615	60,533	
84.365	***English Language Acquisition State Grants***						
G1810	Title III - English Language Acquisition	50280	07/01/18-09/30/21	Pass-Thru	501,682	152,500	
G1877	Title III - English Language Acquisition	53453	07/01/19-09/30/21	Pass-Thru	493,212	277,920	
						430,420	
84.367	***Supporting Effective Instruction State Grants***						
G1808	Title IIA - Teacher Quality	49389	07/01/18-09/30/20	Pass-Thru	1,237,224	128,750	
G1878	Title IIA - Teacher Quality	53612	07/01/19-09/30/21	Pass-Thru	1,199,004	592,383	
G1879	Title IIA - Private School Allocation	53612	07/01/19-09/30/21	Pass-Thru	190,202	85,938	
G1997	Title IIA - Teacher Quality	58838	07/01/20-09/30/21	Pass-Thru	1,087,202	294,067	
G1998	Title IIA - Private School Allocation	58838	07/01/20-09/30/21	Pass-Thru	191,507	29,380	
						1,130,518	
84.411	***Education Innovation and Research***						
G1716	PREP (Education Innovation & Research)	U411C170253	10/01/17-09/30/22	Direct	3,918,325	726,359	
84.424	***Student Support and Academic Enrichment Program***						
G1780	Title IV-A Student Support 18/19	50805	07/01/18-09/30/20	Pass-Thru	694,889	419,754	
G1898	Title IV-A Student Support 19/20	54602	07/01/19-09/30/21	Pass-Thru	680,805	688,342	
G1899	Title IV-A Student Support 19/20 Private	54602	07/01/19-09/30/21	Pass-Thru	123,547	62,648	
G2000	Title IV-A Student Support 20/21	58648	07/01/20-09/30/21	Pass-Thru	629,461	335,913	
G2001	Title IV-A Student Support 20/21 Private	58648	07/01/20-09/30/21	Pass-Thru	110,878	56,439	
						1,563,096	

See accompanying Notes to Schedule of Expenditures of Federal Awards

SCHOOL DISTRICT NO. 1J, MULTNOMAH COUNTY, OREGON
Schedule of Expenditures of Federal Awards
For the year ended June 30, 2021

CFDA/ Grant	Grant Description	Pass-Through Grantor's No.	Period Covered	Direct or Pass-Thru	Award Amount	Expenditures	Agency Total
Department of Education (Continued)							
	Office Of Special Education and Rehabilitative Services						
	Special Education Cluster (IDEA)						
84.027	***Special Education Grants to States***						
G1791	Providence Nursing 19/21	12444	07/01/19-06/30/21	Pass-Thru	1,194,706	40,845	
G1795	DART IDEA	12305	07/01/19-06/30/21	Pass-Thru	65,100	59,700	
G1888	IDEA Part B, Section 611	53816	07/01/19-09/30/21	Pass-Thru	8,086,830	1,692,643	
G1900	Columbia Regional	11046-A3	07/01/19-06/30/21	Pass-Thru	11,435,220	6,888,871	
G2018	IDEA Part B, Section 611	60732	07/01/20-09/30/22	Pass-Thru	8,020,746	6,095,178	
						14,777,237	
84.173	***Special Education Preschool Grants***						
G1889	IDEA Part B, Section 619 19/20	54063	07/01/19-09/30/21	Pass-Thru	91,715	87,190	
G2019	IDEA Part B, Section 619 20/21	60563	07/01/20-09/30/21	Pass-Thru	92,172	6,419	
						93,609	
			Total Special Education (IDEA) Cluster			**14,870,846**	
84.126	***Rehabilitation Services Vocational Rehabilitation Grants to States***						
G1790	YTP Vocational Rehabilitation Grant	160741	07/01/19-06/30/21	Pass-Thru	599,999	156,029	
G2020	Oregon Commission for the Blind	101-20	07/01/20-06/30/21	Pass-Thru	135,675	176,660	
						332,689	
	Education Stabilization Fund						
84.425C	***CARES Act: Governor's Emergency Education Relief Fund***						
G1987	CDL - GEER	61021	07/01/20-05/30/21	Pass-Thru	82,533	79,705	
84.425D	***Elementary and Secondary School Emergency Relief Fund***						
G1984	ESSER	57893	03/01/20-09/30/22	Pass-Thru	8,354,389	7,659,110	
G2041	ESSER II	64664	03/13/20-09/30/23	Pass-Thru	32,836,859	1,739,520	
						9,398,630	
84.425U	***American Rescue Plan Elementary and Secondary School Emergency Relief Fund***						
G2094	ESSER III	64968	03/13/20-09/30/24	Pass-Thru	73,817,944	1,230,204	
			Total Education Stabilization Fund			**10,708,539**	
	Office of Postsecondary Education						
84.334	***Gaining Early Awareness and Readiness for Undergraduate Programs***						
G1455	GEAR-UP - Mobilizing for College	P334A140180	09/25/14-09/24/21	Direct	5,971,200	1,008,555	
G1827	E3 - Engage, Empower, Elevate	P334A180117	10/01/18-09/30/25	Direct	1,566,400	1,141,272	
						2,149,827	

Direct Funding	3,168,647
Pass-Thru from Oregon Department of Education	39,939,840
Pass-Thru from Oregon Commission for the Blind	176,660
Pass-Through from Oregon Department of Human Services	156,029

Department of Education Total							**43,441,176**
Department of Health and Human Services							
	Administration for Children and Families						
	Head Start Cluster						
93.600	***Head Start***						
G1884	Head Start 19/20	10CH010719-01-03	11/01/19-10/31/20	Direct	5,618,686	1,669,956	
G2006	Head Start 20/21	10CH010720-01-03	11/01/20-10/31/21	Direct	5,686,462	3,070,281	
G2021	Head Start COVID19	10CH010719-02-C3	01/01/20-10/31/21	Direct	261,006	136,370	
			Total Head Start Cluster			**4,876,607**	

See accompanying Notes to Schedule of Expenditures of Federal Awards

SCHOOL DISTRICT NO. 1J, MULTNOMAH COUNTY, OREGON
Schedule of Expenditures of Federal Awards
For the year ended June 30, 2021

CFDA/ Grant	Grant Description	Pass-Through Grantor's No.	Period Covered	Direct or Pass-Thru	Award Amount	Expenditures	Agency Total
Department of Health and Human Services (Continued)							
	Centers for Disease Control and Prevention						
93.079	***Cooperative Agreements to Promote Adolescent Health through School-Based HIV/STD Prevention and School-Based Surveillance***						
G1770	SAY Wellness	NU87PS004369-01-00	08/01/18-07/31/23	Direct	740,315	417,342	
G2030	SAY Wellness COVID	NU87PS004369C3	08/01/20-07/31/22	Direct	549,606	184,581	
						601,923	
	Substance Abuse and Mental Health Services Administration						
93.788	***Opioid STR***						
G1912	Health for K-5	159879	04/15/19-09/30/21	Pass-Thru	931,716	361,543	
	Office of Assistant Secretary for Health						
93.297	***Teenage Pregnancy Prevention Program***						
G1985	MultCo Teen Pregnancy	MOU	07/01/20-06/30/21	Pass-Thru	135,000	46,915	
	Centers for Medicare and Medicaid Services						
	Medicaid Cluster						
93.778	***Medical Assistance Program***						
G2023	Medicaid - CRP Audiology	N/A	07/01/20-06/30/21	Pass-Thru	770,201	75,371	
G2025	Medicaid - SPED	N/A	07/01/20-06/30/21	Pass-Thru	1,549,630	104,646	
				Total Medicaid Cluster		**180,017**	
					Direct Funding	5,478,530	
					Pass-Thru from Multnomah County	46,915	
					Pass-Thru from Oregon Health Authority	361,543	
					Pass-Thru from Oregon Department of Human Services	180,017	
Department of Health and Human Services Total							**6,067,005**
Department of Homeland Security							
	Federal Emergency Management Agency						
97.036	***Disaster Grants - Public Assistance (Presidentially Declared Disasters)***						
G2027	FEMA COVID19	4499-DR-OR	03/13/20-0630/27	Pass-Thru	15,940,000	157,272	
					Pass-Thru from Oregon Office of Emergency Management	157,272	
Department of Homeland Security Total							**157,272**
Department of The Treasury							
	Departmental Offices						
21.019	***Coronavirus Relief Fund***						
G2026	OHA COVID Relief	N/A	10/01/20-12/30/20	Pass-Thru	61,473	59,486	
G2031	CDL - CFR	60855	03/01/20-12/30/20	Pass-Thru	628,421	628,421	
G2043	PPS Childcare Subs COVID19	N/A	01/27/21-06/30/21	Pass-Thru	10,000	10,000	
						697,907	
					Pass-Thru from Oregon Health Authority via. The Fund for PPS	69,486	
					Pass-Through from Oregon Department of Education	628,421	
Department of The Treasury Total							**697,907**
	Grand Total					**$ 66,621,440**	**$ 66,621,440**

This schedule is prepared on the modified accrual basis of accounting.

[1] Donated food is valued at estimated fair value.

See accompanying Notes to Schedule of Expenditures of Federal Awards

SCHOOL DISTRICT NO. 1J, MULTNOMAH COUNTY, OREGON
Notes to Schedule of Expenditures of Federal Awards
For the year ended June 30, 2021

Purpose of the Schedule
The accompanying Schedule of Expenditures of Federal Awards (the "Schedule") includes the federal award activity of the District under programs of the federal government for the year ended June 30, 2021. The information in this Schedule is presented in accordance with the requirements of Title 2 U.S. Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards ("Uniform Guidance"). Because the Schedule presents only a selected portion of the operations of the District, it is not intended to and does not present the financial position, changes in net assets, or cash flows of the District.

SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Basis of Presentation
Expenditures reported on the Schedule are reported on the modified accrual basis of accounting. Such expenditures are recognized following the cost principles contained in the Uniform Guidance for State, Local and Indian Tribal Governments, where applicable, wherein certain types of expenditures are not allowable or are limited as to reimbursement.

Indirect Cost Rate
The District has not elected to use the 10 percent de minimis indirect cost rate as allowed under Uniform Guidance.

Federal Financial Assistance
Pursuant to Uniform Guidance, federal financial assistance is defined as assistance provided by a federal agency, either directly or indirectly, in the form of grants, contracts, cooperative agreements, loans, loan guarantees, property, interest subsidies, insurance or direct appropriations. Accordingly, non-monetary federal assistance, including federal surplus property, is included in federal financial assistance and, therefore, is reported on the Schedule, if applicable. Federal financial assistance does not include direct federal cash assistance to individuals. Solicited contracts between the state and federal government for which the federal government procures tangible goods or services are not considered to be federal financial assistance.

Major Programs
Uniform Guidance establishes criteria to be used in defining major federal financial assistance programs. Major programs for the District are those programs selected for testing by the auditor using a risk-assessment model, as well as certain minimum expenditure requirements, as outlined in Uniform Guidance. Programs with similar requirements may be grouped into a cluster for testing purposes.

Reporting Entity
The reporting entity is fully described in notes to the financial statements. The Schedule includes all federal programs administered by the District for the year ended June 30, 2021.

Expenditure Recognition
Expenditures of federal awards are accounted for under the modified accrual basis of accounting. Expenditures are recorded when the liability is incurred. Donated commodities are valued at their estimated fair value.

Subrecipients
The District does not pass-through federal awards to any subrecipients.

PPS

Astor K-8 School 1st Day

PPS

SCHOOL DISTRICT No. 1J, MULTNOMAH COUNTY, OREGON

SCHEDULE OF FINDINGS AND QUESTIONED COSTS

YEAR ENDED JUNE 30, 2021

SECTION I - SUMMARY OF INDEPENDENT AUDITOR'S RESULTS

Financial Statements:

Type of auditor's report issued	Unmodified
Internal control over financial reporting:	
Material weakness(es) identified?	No
Significant deficiency(ies) identified that are not considered to be material weakness(es)?	No
Noncompliance material to financial statements noted?	No

Federal Awards:

Internal control over major programs:	
Material weakness(es) identified?	No
Significant deficiency(ies) identified that are not considered to be material weakness(es)?	No
Type of auditor's report issued on compliance for major programs:	Unmodified
Any audit findings disclosed that are required to be reported in accordance with section 2 CFR 200.516(a)?	No

Identification of major programs:

CFDA NUMBER(S)	NAME OF PROGRAM OR CLUSTER
10.558	Child and Adult Care Food Program
21.019	Coronavirus Relief Fund
84.334	Gaining Early Awareness and Readiness for Undergraduate Programs
84.425	Education Stabilization Fund
93.600	Head Start

SCHOOL DISTRICT No. 1J, MULTNOMAH COUNTY, OREGON

SCHEDULE OF FINDINGS AND QUESTIONED COSTS (Continued)

YEAR ENDED JUNE 30, 2021

SECTION I - SUMMARY OF INDEPENDENT AUDITOR'S RESULTS (Continued)

Dollar threshold used to distinguish between type A and type B programs	$ 1,998,643
Auditee qualified as low-risk auditee?	Yes

SECTION II - FINANCIAL STATEMENT FINDINGS

No findings reported.

SECTION III - FEDERAL AWARD FINDINGS AND QUESTIONED COSTS

No findings reported.

SECTION IV – SUMMARY SCHEDULE OF PRIOR AUDIT FINDINGS

No prior audit findings reported.

Hayhurst Elementary School 1st Day

Jason Lee Elementary School 1st Day

PPS

Portland Public Schools Nondiscrimination Statement

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

Board of Education Policy 1.80.020-P

Contact Information for Civil Rights Matters

District Title VI:	Angie Morrill	Phone: 503-916-6499 x71112
District Title IX:	Liane O'Banion	Phone: 503-916-3025
District 504:	James Loveland	Phone: 503-916-2000 x71041
American Disabilities Act:	Human Resources	Phone: 503-916-3544

2020-21 Report on Requirements for Federal Awards Preparation

Deputy Superintendent, Business & Operations	Claire Hertz
Chief Financial Officer	Nolberto Delgadillo
Sr. Director of Financial Services	Tracy Pinder, CPA

Budget & Grant Accounting

Sr. Budget & Grant Accounting Manager	Melissa Ensminger
Sr. Accountant/Analyst	Stacey Hoang
Sr. Accountant/Analyst	Kristin Johnson
Sr. Accountant/Analyst	Michael Johnson
Accountant/Analyst	Abigail Miller
Sr. Accountant/Analyst	Aaron Musk
Sr. Accountant/Analyst	Zeb Petterborg
Sr. Accountant/Analyst	Patrick Rodeman

PORTLAND PUBLIC SCHOOLS
OFFICE OF General Counsel

501 North Dixon Street / Portland, OR 97227
Telephone: (503) 916-3274

Date: December 6, 2021

To: School Board

From: Mary Kane, Senior Legal Counsel

Subject: Workplace Harassment Policy Revisions

BACKGROUND

The 2019 Oregon Legislature made a number of revisions to statutes related to employment and required workplace policies to address unlawful conduct constituting discrimination in the workplace and to provide protections against workplace harassment of employees. In 2021, the Oregon Legislature expanded protections against discrimination of gender identity, including it as a protected class in all Oregon laws that use "sexual orientation" in the text.

As we began work to incorporate "gender identity" into the text, the Department of Human Resources also requested that we consider expanding the definition of harassment to allow for greater protections of employees at PPS.

The amendments to the Workplace Policy reflect the inclusion of "gender identity" within the list of protected classes and also expands the definition of harassment beyond harassment arising from conduct constituting discrimination.

RELATED POLICIES/BEST PRACTICES

It is best practice to update policies to align with legislative changes.

FISCAL IMPACT

There is no fiscal impact projected for these changes to the policy.

TIMELINE FOR IMPLEMENTATION / EVALUATION

The changes will be implemented immediately.

CONNECTION TO BOARD GOALS

These revisions reflect the Board's goals to address discrimination in the workplace and to provide a safe and inclusive environment for all.

STAFF RECOMMENDATION

Staff recommends that the Board adopt these revisions to the Workplace Harassment Policy.

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

_____ *(Initials)*

ATTACHMENTS

A. Redline version Workplace Harassment Policy

B. Clean version Workplace Harassment Policy

BOARD POLICY 5.10.060-P

Workplace Harassment

(1) All District work environments should be free from any form of harassment, including sexual harassment. All District employees, school board members, volunteers, and contractors, must avoid any conduct or action that could be characterized as harassment of another employee, whether that occurs in the workplace or off District premises.

(2) Workplace harassment is unwelcome and offensive conduct that creates an intimidating, hostile or abusive work environment. Harassment includes, but is not limited to, ~~means~~ conduct that constitutes discrimination based on race, color, religion, sex, sexual orientation, gender identity, national origin, marital status, age, disability, expunged juvenile record, and any other discrimination prohibited by law and includes sexual assault.

(3) Sexual assault means unwanted conduct of a sexual nature that is inflicted upon a person or compelled through the use of physical force, manipulation, threat, or intimidation and includes any unwelcome sexual advances, requests for sexual favors, physical contact, or any other unwelcome conduct, verbal or nonverbal, of a sexual nature when:

(a) The employee's submission to, or rejection of, the conduct is made either an implicit or explicit term or condition of employment (including wages, evaluation, advancement, retention, assigned duties, or other employment-related matters);

(b) The conduct by supervisors or other District employees, school board members, contractors, and volunteers, that has the purpose or effect of substantially interfering with an individual's work performance; or

(c) The conduct by supervisors or other District employees, school board members, contractors, and volunteers, that has the effect of creating an intimidating, hostile, or offensive working environment.

(A) **Verbal conduct** includes sexual innuendos, suggestive comments, jokes of a sexual nature, sexual propositions, and threats.

(B) **Nonverbal conduct** includes sexually suggestive objects or pictures, graphic commentaries, suggestive or insulting noises, obscene gestures, whistling, and leering.

(C) **Physical conduct** includes unwanted physical contact such as touching, pinching, brushing the body, coerced sexual intercourse, or assault.

(4) No District employee, school board member, contractor, or volunteer may use the authority of their position to subject any employee to sexual harassment, as described above, or to coerce, encourage, or force another into a romantic relationship.

(5) When it is brought to their attention, administrators and supervisors must take affirmative steps to stop workplace harassment, including sexual harassment of subordinates or non-employees, including warning, discipline, and recommending possible dismissal of the offending staff.

(6) Any District employee who believes they have been subject to workplace harassment may file a report with

DRAFT

(a) their supervisor,

(b) the Human Resources Department Complaint hotline,.

(c) the Oregon Bureau of Labor and Industries' (BOLI) complaint resolution process

(d) or through other avenues available under civil or criminal law.

(e) Any person who believes they have been subject to workplace harassment should also make a report of sexual harassment to the Title IX Director for the District.

(7) All incidents of behavior that may violate this policy shall be promptly investigated. The District will make every reasonable effort to safeguard employee privacy and preserve confidentiality to the extent the investigative process allows.

(8) The District will not tolerate retaliation by any District employee, school board member, contractor, or volunteer, against any person who in good faith reports conduct believed to constitute workplace harassment. The District may discipline employees who retaliate in violation of this policy, provide false information, or make a complaint in bad faith. The District may take any other action it deems necessary in response to similar conduct from a contractor or volunteer.

(9) The District may not require or coerce an employee who makes an allegation of workplace harassment to enter into a nondisclosure or nondisparagement agreement unless it complies with ORS 659A.

(10) District employees who makes a report of workplace harassment shall be provided all information required by law, including, timelines for relief for available administrative or judicial remedies.

(11) All complaints of harassment directed toward non-employees should be addressed under the District's Nondiscrimination/Anti-Harassment Policy, 1.80.020-P.

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Legal References: ORS 659A.001 et seq. ORS 342.700 to 342.708; ORS 342.865
Title VI of the Civil Rights Act of 1964,
Title VII of the Civil Rights Act of 1964,
Title IX of the Education Amendments of 1972, 20 U.S.C.A., 1681-1683 (2018)
Americans with Disabilities Act of 1990, 42 U.S.C. Section 12101 et seq. 29 CFR Part 1630

History: Adpt. 9/25/97; Amd. 2/99, 5/20

BOARD POLICY 5.10.060-P

Workplace Harassment

[INSERT Link to AD]

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Board Policy 5.10.060-P

Workplace Harassment

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(2) Workplace harassment means conduct that constitutes discrimination based on race, color, religion, sex, sexual orientation, national origin, marital status, age, disability, expunged juvenile record, and any other discrimination prohibited by law and includes sexual assault.

(3) Sexual harassment means unwanted conduct of a sexual nature that is inflicted upon a person or compelled through the use of physical force, manipulation, threat, or intimidation and includes any unwelcome sexual advances, requests for sexual favors, physical contact, or any other unwelcome conduct, verbal or nonverbal, of a sexual nature when:

   (a) The employee's submission to, or rejection of, the conduct is made either an implicit or explicit term or condition of employment (including wages, evaluation, advancement, retention, assigned duties, or other employment-related matters);

   (b) The conduct by supervisors or other District employees, school board members, contractors, and volunteers, that has the purpose or effect of substantially interfering with an individual's work performance; or

   (c) The conduct by supervisors or other District employees, school board members, contractors, and volunteers, that has the effect of creating an intimidating, hostile, or offensive working environment.

      (A) **Verbal conduct** includes sexual innuendos, suggestive comments, jokes of a sexual nature, sexual propositions, and threats.

      (B) **Nonverbal conduct** includes sexually suggestive objects or pictures, graphic commentaries,

suggestive or insulting noises, obscene gestures, whistling, and leering.

(C) **Physical conduct** includes unwanted physical contact such as touching, pinching, brushing the body, coerced sexual intercourse, or assault.

(4) Sexual harassment also includes assault which occurs when sexual contact occurs without a staff member's consent because the staff member is under the influence of drugs or alcohol, is unconscious or is pressured through physical force, coercion or explicit or implied threats.

(5) No District employee, school board member, contractor, or volunteer may use the authority of their position to subject any employee to sexual harassment, as described above, or to coerce, encourage, or force another into a romantic relationship.

(6) When it is brought to their attention, administrators and supervisors must take affirmative steps to stop workplace harassment, including sexual harassment of subordinates or non-employees, including warning, discipline, and recommending possible dismissal of the offending staff.

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(b) the Human Resources Department Complaint hotline

(c) the Oregon Bureau of Labor and Industries' (BOLI) complaint resolution process or

(d) through other avenues available under civil or criminal law.

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(12) All complaints of harassment directed toward non-employees should be addressed under the District's Nondiscrimination/Anti-Harassment Policy, 1.80.020-P.

Legal References: ORS 659A.001 et seq. ORS 342.700 to 342.708; ORS 342.865
Title VI of the Civil Rights Act of 1964,
Title VII of the Civil Rights Act of 1964,
Title IX of the Education Amendments of 1972, 20 U.S.C.A., 1681-1683 (2018)
Americans with Disabilities Act of 1990, 42 U.S.C. Section 12101 et seq.
29 CFR Part 1630

History: Adpt. 9/25/97; Amd. 2/99, 5/20, 6/21

OSBA: GBN/JBA and GBNA

5.10.061-AD Sexual Harassment Complaint Procedure

PORTLAND PUBLIC SCHOOLS
OFFICE OF LEGAL COUNSEL

501 North Dixon Street / Portland, OR 97227
Telephone: (503) 916-3274

Date: December 14, 2021

To: School Board

From: Mary Kane, Senior Legal Counsel

Subject: Recommended for policy rescissions

The Board Policy Committee met on December 1, 2021, and discussed continuing to review policies to determine which needed updates and which should be rescinded. Two policies were put forward by staff with recommendations that they be rescinded. After discussion, the Policy Committee recommended that the following two policies be forwarded to the full Board with a recommendation for First Reading en route to rescission:

a. **1.10.020-P Definitions**

This policy was adopted in 1971 and amended in 2002. The policy definitions are intuitive and do not add value to an already voluminous policy manual.

b. **2.40.010-P Teacher Membership on Committees**

This policy was adopted in 1971 and amended in 2002. The policy language is commentary in form and is a long-standing practice that does not constitute Board policy.

1.10.020-P Definitions

BOARD POLICY

(1) The terms "Portland Public Schools,î ìPPS,î ìschool districtî and ìdistrictî as used in this policy and administrative directive manual shall mean the school system of Multnomah County school district No. 1J.

(2) The terms ìBoard member(s)î or "School Director(s)" as used in this policy and administrative directive manual shall mean those persons duly elected according to election laws of the state to serve on the chief governing body of the district.

(3) The terms "Board," "School Board" and "Board of Education," as used in this policy and administrative directive shall mean the Board of Directors of Multnomah County school district No. 1J.

Legal Reference: ORS 332.107

History: Adpt 6/71; Amd 7/79; Amd 12/83; Amd 9/9/02; BA 2417

2.40.010-P Teacher Membership on Committees

BOARD POLICY

(1) The Board affirms the proposition that teacher input is important to committees dealing with decisions that directly affect the educational activities of teachers and students. Therefore, whenever appointing any committee, an administrator is directed to determine the appropriateness of seeking teacher representation. If such membership is determined appropriate, provisions for such appointment shall be made. In instances where no teachers are appointed, the administrator must have adequate rationale for not including the teacher members.

Legal References:

History: Adpt 6/71; Amd 9/83; Amd 9/9/02; BA 2418

RESOLUTION No. 6417

Resolution to Adopt Revised PPS Cafeteria Plan Policy 5.10.090-P

RECITALS

A. On November 10, 2021, the Board Policy Committee reviewed and considered the proposed revisions of the PPS Cafeteria Plan policy 5.10.090-P.

B. On November 16, 2021, the Board presented the first reading of the revised PPS Cafeteria Plan policy.

C. Pursuant to District policy, the public comment was open for at least 21 days, and there was no public comment received during the comment period.

RESOLUTION

The Board hereby adopts the revised PPS Cafeteria Planpolicy 5.10.090-P and instructs the Superintendent to amend any relevant administrative directives to conform to this adopted policy.

Board Policy 5.10.090-P

PPS Cafeteria Plan

In order to deliver on its Mission and Vision, Portland Public Schools needs to attract, retain and support a qualified workforce. In support of that, PPS offers comprehensive employee benefit offerings including health and wellness benefits and flexible spending accounts.

Legally required compliance changes to the District Cafeteria Plan will be publicly posted 10 days before plan changes are made, and the financial implications of the changes will be shared with, and may be reviewed by, the Board. Changes to the Cafeteria Plan that represent new benefit programs will be approved by the Board.

The District's Cafeteria Plan will be publicly posted.

Amended 1/2011; 10/2013; 10/2014; 2/2015; 12/2021

Portland Public School District 1st Reading

DATE OF FIRST READING: November 16, 2021

PUBLIC COMMENT FOR
Policy 5.10.090-P:
Cafeteria Plan

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

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

Last Date for Comment: December 07, 2021

Summary: **Policy 5.10.090-P Cafeteria Plan**

1st Reading by: **Julia Brim-Edwards**
Portland Public School Board

Recommended for a 1st Reading by:
Portland Public Schools Board of Education
Policy Committee

Draft Policy Web Site: https://www.pps.net/Page/11911

Contact: **Rosanne Powell,** Senior Board Manager
Address: P.O. Box 3107, Portland, OR 97208-3107
Telephone: 503-916-3741
E-mail: schoolboard@pps.net

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MEMO

TO: Portland Public Schools Board of Education

FROM: Liz Large, Contracted General Counsel

DATE: November 10, 2021

SUBJECT: Amendment to the Cafeteria Plan 5.10.090-P Policy

BACKGROUND

A cafeteria plan is a separate written compliance plan maintained by an employer for employees that meets the specific requirements and regulations of the Internal Revenue Code as it relates to certain benefits that can be offered on a pretax basis.

To comply with the Internal Revenue Code and changes related to the pandemic, the Cafeteria Plan must be amended before December 31, 2021. Currently, the District's Cafeteria Plan is attached to and constitutes the entire Cafeteria Plan 5.10.090-P Policy. In order to allow for more efficient administration of the Cafeteria Plan, we recommend that (1) the policy be amended to remove the plan itself from the policy and (2) that legally required, compliance changes no longer be required to be approved by the Board. Instead, legally required compliance changes will be publicly posted 10 days before plan changes are made, and the financial implications of the changes will be shared with, and may be reviewed by, the Board. Changes to the Cafeteria Plan that represent new material benefit programs will be approved by the Board.

If the recommended changes to the Cafeteria Plan 5.10.090-P Policy are not approved by the Board by December 31, 2021, staff will seek to amend the Cafeteria Plan through the policy making process or ask the Board to waive the 21-day public comment period in order to approve the Cafeteria Plan before the deadline.

The attached amended Cafeteria Plan 5.10.090-P Policy, was reviewed by the Board Policy Committee at the November 10, 2021, meeting and was recommended to move to the full Board for consideration.

Board Policy 5.10.090-P

PPS Cafeteria Plan

DRAFT 11/10/2021

In order to deliver on its Mission and Vision, Portland Public Schools needs to attract, retain and support a qualified workforce. In support of that, PPS offers comprehensive employee benefit offerings including health and wellness benefits and flexible spending accounts.

Legally required compliance changes to the District Cafeteria Plan will be publicly posted 10 days before plan changes are made, and the financial implications of the changes will be shared with, and may be reviewed by, the Board. Changes to the Cafeteria Plan that represent new benefit programs will be approved by the Board.

The District's Cafeteria Plan will be publicly posted.

Amended 1/2011; 10/2013; 10/2014; 2/2015;

	BOARD POLICY **CAFETERIA PLAN**	**5.10.090-P**

PORTLAND PUBLIC SCHOOLS
CAFETERIA PLAN

Amended and Restated
Effective January 1, 2006

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~~PORTLAND PUBLIC SCHOOLS~~

~~CAFETERIA PLAN~~

~~P A R T I E S~~

~~THIS AMENDED AND RESTATED PLAN is adopted effective January 1, 2006, by the School District No. 1, Multnomah County, Oregon ("District").~~

~~R E C I T A L S~~

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

~~The Plan was last amended effective January 1, 2005.~~

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

~~The District desires to amend the Plan to comply with changes in applicable federal law and in certain other respects, and to restate the Plan.~~

~~A M E N D M E N T A N D R E S T A T E M E N T~~

~~The PORTLAND PUBLIC SCHOOLS CAFETERIA PLAN is hereby amended and restated effective January 1, 2006, as set forth herein.~~

ARTICLE 1

~~NAME AND EFFECTIVE DATE~~

~~**1.1 Name.** This Plan shall be known as the Portland Public Schools Cafeteria Plan.~~

~~**1.2 Effective Date.** The effective date of this amended and restated Plan is January 1, 2006. The benefits payable to or on behalf of a Participant in the Plan in accordance with the following provisions shall not be affected by the terms of any amendment to the Plan adopted after the Participant separates from service with the District unless the amendment expressly provides otherwise.~~

ARTICLE 2

DEFINITIONS

Whenever used herein, unless the context clearly indicates otherwise, masculine, feminine, and neuter words may be used interchangeably, singular shall mean the plural and vice versa, and the following words and phrases shall have the following meanings when used with an initial capital letter:

2.1 "Account" means the separate record or records maintained by the Plan Administrator in the name of a Participant in accordance with this Plan.

2.2 "Benefit Package Option" means a qualified benefit under Code Section 125(f) that is offered under a cafeteria plan, or an option for coverage under an underlying accident or health plan (such as an indemnity option, an HMO option, or a PPO option under an accident or health plan).

2.3 "Code" means the Internal Revenue Code of 1986, as amended, and successor Codes thereto.

2.4 "Compensation" means an Eligible Employee's wages or salary from the District during the Plan Year for personal services rendered, including bonuses, overtime, commissions, and other forms of remuneration includable in gross income.

2.5 "Dental and Vision Care Expense" means an expense incurred by a Participant on behalf of the Participant or the Participant's spouse, Dependent, or child (as defined in Code Section 152(f)(1)) who has not attained age 27 as of the end of the Participant's taxable year, for dental or vision care as defined in Code Section 223(c) which is medical care as defined under Code Section 213(d), but only to the extent such expense is reimbursable under the separate dental and vision care reimbursement account program set forth in Article 10 and not used as a deduction on the Participant's federal income tax return.

2.6 "Dependent Care Expenses" means expenses described in 11.4 that are incurred by a Participant and are considered employment-related expenses as defined in Code Section 21(b)(2), but only to the extent that such amounts are reimbursable under the separate dependent care assistance program set forth in Article 11 and are not used by the Participant to obtain a credit against the Participant's federal income tax for employment-related expenses under Code Section 21.

2.7 "Dependent" means, for purposes of 2.10, 2.18, and 4.3, a person who is a Participant's dependent as defined in Code Section 152, except that, for purposes of accident or health coverage, any child to whom Code Section 152(e) applies is treated as a dependent of both parents, and, for purposes of dependent care assistance provided through a cafeteria plan, a dependent means a qualifying individual (as defined in Code Section 21(b)(1)) with respect to the Participant. For purposes of 2.5, 2.11, Article 9, and Article 10, a Dependent means a person who is a Participant's dependent as defined in Code Section 105(b).

2.8 "District" means School District No. 1, Multnomah County, Oregon.

2.9 "Eligible Employee" means any District employee, other than the following individuals:

(a) An employee who is a member of a collective bargaining unit that has bargained in good faith with the District over the benefits provided under this Plan and the bargaining agreement does not specifically require participation in this Plan;

(b) A student worker;

(c) An employee who is employed on an on-call basis, a limited-term employee, or an employee who does not have regularly scheduled hours of employment, including classified substitutes but excluding substitute teachers;

(d) A person who performs services for the District pursuant to an agreement between the District and an organization that leases employees (including a person who is not an employee, but who is treated as an employee, for purposes of Code Sections 106, 125, and 129, by reason of being a "leased employee" as defined in Code Section 414(n));

(e) A self-employed person as defined in Code Section 401(c);

(f) A person who performs services for the District but who is treated for payroll tax purposes as other than an employee of the District (and regardless whether the person may subsequently be determined by a governmental agency, by the conclusion or settlement of threatened or pending litigation, or otherwise to be or have been an employee of the District); and

(g) An employee who has regularly scheduled hours of employment but is less than half-time.

Notwithstanding the foregoing, substitute teachers are excluded from the definition of "Eligible Employee" for purposes of the Premium Payment Benefit described in 4.1(a) only.

2.10 "Family Member Plan" means a cafeteria plan or Qualified Benefits Plan sponsored by the employer of the Participant's spouse or the Participant's Dependent.

2.11 "Health Care Expense" means an expense incurred by a Participant on behalf of the Participant or the Participant's spouse, Dependent, or child (as defined in Code Section 152(f)(1)) who has not attained age 27 as of the end of the Participant's taxable year, for medical care as defined under Code Section 213(d), but only to the extent such expense is reimbursable under the separate health care reimbursement account program set forth in Article 9 and not used as a deduction on the Participant's federal income tax return.

2.12 "Health Savings Account" means a health savings account ("HSA") as defined by Code Section 223(d). An HSA is an individual trust or custodial account separately established and maintained outside the Plan by a Participant and a qualified trustee or custodian.

2.13 "Participant" means an Eligible Employee who has commenced and continues participation in the Plan as provided in Article 3.

2.14 "Plan" means this Portland Public Schools Cafeteria Plan, as amended from time to time.

2.15 "Plan Administrator" means such person or persons appointed by the District to control and manage the operation and administration of the Plan. In the absence of such an appointment, the District shall be the Plan Administrator.

2.16 "Plan Year" means, with respect to the health care reimbursement account program, dental and vision care reimbursement account program, and the dependent care reimbursement account program, the calendar year (January 1 through December 31). The initial Plan Year of the dental and vision care reimbursement account program shall be a short Plan Year of October 1, 2013, through December 31, 2013.

Notwithstanding the foregoing, with respect only to Eligible Employees whose Premium Payment Benefit's Plan Year is October 1 through September 30, the Plan Year for the health care reimbursement account program and dental and vision care reimbursement account program that begins January 1, 2014, shall be a short Plan Year of January 1, 2014, through September 30, 2014, and, beginning October 1, 2014, the Plan Year shall be October 1 through September 30.

With respect to the Premium Payment Benefit described in 4.1(a), the Plan Year means the plan year of the underlying group health plans. To the extent that the underlying group health plans have differing plan years, there shall be a separate Premium Payment Benefit for each group of group health plans that have the same plan year. The Plan Years for the Premium Payment Benefits are described in Exhibit A, which is attached hereto and incorporated by this reference herein. Exhibit A may be revised from time to time by the Plan Administrator without a formal amendment of this Plan document.

2.17 "Qualified Benefits Plan" means an employee benefit plan governing the provision of one or more benefits that are qualified benefits under Code Section 125(f). A plan does not fail to be a Qualified Benefits Plan merely because it includes a flexible spending arrangement (as defined in Code Section 106(c)(2)), provided that the flexible spending arrangement meets the requirements of Code Section 125 and the regulations thereunder.

2.18 "Similar Coverage" means coverage for the same category of benefits for the same individuals (e.g., family to family or single to single). For example, two plans that provide major medical coverage provide Similar Coverage. A health flexible spending arrangement is not Similar Coverage with respect to an accident or health plan that is not a health flexible spending arrangement. Coverage provided by another employer, such as a spouse's or Dependent's employer, may be treated as providing Similar Coverage if it satisfies the requirements of this section.

ARTICLE 3

ELIGIBILITY

3.1 Eligibility for Participation. An Eligible Employee shall be eligible to participate in this Plan on the first day of the calendar month after he or she has completed one full calendar month of employment.

3.2 Termination of Participation. In the event a Participant transfers to an ineligible class of employees or terminates employment with the District, the Participant's participation in this Plan shall cease as of the date of such transfer or termination, except as specifically provided for in this Plan.

3.3 Transfer from Ineligible to Eligible Class. In the event an ineligible employee transfers to the eligible class, he or she shall be eligible to participate in the Plan on the first day of the calendar month following the transfer if he or she is a former Participant or has previously satisfied the requirements of 3.1 and would have previously been eligible to participate if he or she had been in the eligible class.

3.4 Special Rules. Notwithstanding the provisions of 3.1, the following special rules apply.

(a) Eligibility for HSA. To be eligible to elect the Health Savings Account Benefit described in 4.1(e), an Eligible Employee must elect coverage under a District-provided high deductible health plan ("HDHP") option that satisfies Code Section 223(c)(2). An employee is not eligible to elect the Health Savings Account Benefit if he or she elects coverage under the Health Care Expense Reimbursement Benefit described in 4.1(b) or is covered under a general purpose, nonsuspended health reimbursement arrangement provided by the District outside the Plan. An Eligible Employee must also meet additional requirements as described in Article 12 to elect the Health Savings Account Benefit.

(b) Eligibility for Health Care Expense Reimbursement Benefit. An employee is not eligible to elect coverage under the Health Care Expense Reimbursement Benefit described in 4.1(b) if he or she elects coverage under a District-provided HDHP option, the Health Savings Account Benefit described in 4.1(e), or the Dental and Vision Care Expense Reimbursement Benefit described in 4.1(c).

(c) Eligibility for Dental and Vision Care Expense Reimbursement Benefit. An employee is not eligible to elect coverage under the Dental and Vision Care Expense Reimbursement Benefit described in 4.1(c) he or she elects coverage under the Health Care Expense Reimbursement Benefit described in 4.1(b).

ARTICLE 4

PARTICIPATION

4.1 Election to Participate. The participation election form shall be signed by the Eligible Employee, shall designate the benefits in which the Eligible Employee elects to participate, and shall designate the Plan Year (or the remaining portion of the Plan Year) as the time period for which participation will be effective. The election form shall also specify the amounts by which the employee's Compensation shall be reduced or the amount of such reduction shall be determinable from that form. A Participant's Compensation reduction election must satisfy the minimum and maximum elective contribution requirements in 5.3.

An election form filed by a Participant is subject to acceptance, modification, or rejection by the Plan Administrator. The Plan Administrator may modify or reject an election in order to satisfy the terms of this Plan or applicable legal requirements.

Subject to 3.4, an Eligible Employee may elect to receive one or more of the following benefits, all of which (except the cash benefit) shall be paid or reimbursed under this Plan by a Compensation reduction agreement with the employee:

(a) Premium Payment Benefit. This benefit consists of the Participant's share of the cost of the premiums under the District-provided group health plans to the extent that coverage under such plans is excludible from income under Code Section 106. The terms, conditions, and benefits of the various health plans are set forth in separate plan documents which are incorporated herein by this reference.

(b) Health Care Expense Reimbursement Benefit. This benefit consists of Health Care Expenses incurred by the Participant that are reimbursable under the health care reimbursement account program set forth in Article 9.

(c) Dental and Vision Care Expense Reimbursement Benefit. This benefit consists of Dental and Vision Care Expenses incurred by the Participant that are reimbursable under the dental and vision care reimbursement account program set forth in Article 10.

(d) Dependent Care Expense Reimbursement Benefit. This benefit consists of Dependent Care Expenses incurred by the Participant that are reimbursable under the dependent care assistance program set forth in Article 11.

(e) Health Savings Account Benefit. This benefit consists of pre-tax Compensation reduction contributions and District contributions as described in Article 12 to a qualifying HSA established and maintained outside the Plan.

(f) Cash Benefit. This benefit consists of taxable cash compensation payable in substantially equal amounts ratably over the Plan Year or over the portion of the Plan Year during which the Participant's Compensation is generally

paid when the Participant has elected to be compensated on a school year basis. An eligible Participant may elect to receive a portion of the District contribution (other than the District contribution to an HSA) as taxable cash compensation instead of electing coverage under a District-provided group health plan. The eligibility and other requirements for cashing out the District contribution are set forth in Exhibit B, which is attached hereto and incorporated by reference herein. Exhibit B may be revised from time to time by the Plan Administrator without a formal amendment of this Plan document.

4.2 Election Procedures. The following rules shall govern an Eligible Employee's elections under this Plan:

(a) Initial Participation. Except as otherwise provided in 4.3, if the Eligible Employee does not make the participation election before the employee is to begin participation under 3.1, the employee's election may be made only

during the annual open enrollment period and will be effective as of the first day of the Plan Year to which the open enrollment period applies.

(b) Continuation of Participation. A Participant shall make a new election for each Plan Year to continue participation in the Plan. A Participant's election shall be made during the annual open enrollment period chosen by the Plan Administrator, prior to the beginning of the Plan Year to which the election applies. The first day of that Plan Year shall be the effective date of the Participant's participation for that Plan Year.

(c) Eligible Expenses. Expenses eligible for reimbursement under a reimbursement benefit elected by the Participant shall be only the eligible expenses incurred by the Participant after the effective date of the employee's participation and during the Plan Year for which the election is made. Expenses incurred before or after the applicable Plan Year or the period of coverage shall not be reimbursable from amounts contributed by the District on behalf of the Participant during the applicable Plan Year.

(d) Additional Eligibility Requirements. The program and plan documents incorporated by reference into this Plan may have their own eligibility requirements for participation. The eligibility rules of this Plan are in addition to and do not override the eligibility rules of the benefit programs or plans that have been incorporated by reference herein.

4.3 Revocation and Changes. Once made, a Participant's election shall be effective for the entire Plan Year for which made and shall not be revoked or changed except as provided in this section. The reasons for which revocations or changes in elections provided in this section are permitted may be restricted pursuant to nondiscriminatory rules adopted by the Plan Administrator that are consistently applied. Except as provided below, benefit election changes must be made within 31 days after the event that entitles the Participant to make the election change. With respect to a benefit election change made under 4.3(c) on account of losing coverage under Medicaid or a state child health plan ("CHIP") or becoming eligible for a premium assistance subsidy under Medicaid or CHIP, the election change must be made within 60 days after the loss of coverage or the determination of eligibility, as applicable.

Notwithstanding the foregoing, an election to contribute to an HSA can be changed or revoked as provided in 4.3(h).

If any election change is conditioned upon an individual obtaining (or ceasing) coverage under another plan, the Plan Administrator may rely on a Participant's certification that the individual has or will obtain (or does not have or will cease) coverage under the other plan (unless the Plan Administrator has reason to believe that the certification is incorrect).

(a) Significant Cost or Coverage Changes. This 4.3(a) sets forth rules for election changes as a result of changes in cost or coverage. This 4.3(a) does not allow election changes with respect to the Health Care Expense

Reimbursement Benefit described in 4.1(b) or the Dental and Vision Care Expense Reimbursement Benefit described in 4.1(c).

(1) **Cost Changes.**

(A) **Automatic Changes.** If the cost of a Qualified Benefits Plan increases or decreases during a Plan Year and, under the terms of the plan, Participants are required to make a corresponding change in their payments, the Plan Administrator may, on a reasonable and consistent basis, automatically make a

prospective increase or decrease, as the case may be, in the affected Participants' Compensation reduction contributions for such plan.

(B) Significant Cost Changes. If the Plan Administrator determines that the cost charged to a Participant for a Benefit Package Option has significantly increased or decreased during a Plan Year, the Participant may make a corresponding change in election under the Plan. Changes that may be made include commencing participation in the Plan for the Benefit Package Option with a decrease in cost, or, in the case of an increase in cost, revoking an election for that coverage and, in lieu thereof, either receiving on a prospective basis coverage under another Benefit Package Option providing Similar Coverage or dropping coverage if no other Benefit Package Option providing Similar Coverage is available.

(C) Application of Cost Changes. For purposes of 4.3(a)(1)(A) and (B), a cost increase or decrease means an increase or decrease in the amount of the Compensation reduction contributions under the Plan, whether that increase or decrease results from an action taken by the Participant or the Employer.

(D) Application to Dependent Care. This 4.3(a)(1) applies in the case of a dependent care assistance plan only if the cost change is imposed by a dependent care provider who is not a relative of the Participant. For this purpose, a relative is an individual who is related as described in Code Sections 152(d)(2)(A) through (G), incorporating the rule of Code Section 152(f)(4).

(2) Coverage Changes.

(A) Significant Curtailment Without Loss of Coverage. If a Participant (or a spouse or Dependent) has a significant curtailment of coverage under a plan during the Plan Year that is not a loss of coverage as described in 4.3(a)(2)(B) (such as a significant increase in the deductible, the copay, or the out-of-pocket cost sharing limit under an accident or health plan), any Participant who had been participating in the plan and receiving that coverage may revoke his or her election for that coverage and, in lieu thereof, elect to receive on a prospective basis coverage under another Benefit Package Option providing Similar Coverage. Coverage under a plan is significantly curtailed only if there is an overall reduction in coverage provided under the plan so as to constitute reduced coverage generally.

~~(B) Significant Curtailment With Loss of Coverage.~~ ~~If a Participant (or a spouse or Dependent) has a significant curtailment that is a loss of coverage, that Participant may revoke his or her election under the Plan and, in lieu thereof, elect either to receive on a prospective basis coverage under another Benefit Package Option providing Similar Coverage or to drop coverage if no Benefit Package Option providing Similar Coverage is available. A loss of coverage means a complete loss of coverage under the Benefit Package Option or other coverage option (including the elimination of a Benefit Package Option, an HMO ceasing to be available in the area where the individual resides, or the individual losing all coverage under the option by reason of an overall lifetime or annual limitation). The Plan Administrator may, in its discretion (which may be exercised on a case-by-case basis provided that the exercise of discretion does not discriminate in favor of highly compensated Participants), treat the following as a loss of coverage:~~

~~(i) A substantial decrease in the medical care providers available under the option (such as a major hospital ceasing to be a member of a preferred provider network or a substantial decrease in the physicians participating in a preferred provider network or an HMO);~~

~~(ii) A reduction in the benefits for a specific type of medical condition or treatment with respect to which the Participant, spouse, or Dependent is currently in a course of treatment; or~~

~~(iii) Any other similar fundamental loss of coverage.~~

~~(C) Addition or Improvement of a Benefit Package Option.~~ ~~If a plan adds a new Benefit Package Option or other coverage option, or if coverage under an existing Benefit Package Option or other coverage option is significantly improved during a Plan Year, eligible Participants (whether or not they have previously made an election under the Plan or have previously elected the Benefit Package Option) may revoke their election under the Plan and, in lieu thereof, make an election on a prospective basis for coverage under the new or improved Benefit Package Option.~~

~~(3) Change in Coverage Under Another Employer Plan.~~ ~~A Participant may make a prospective election change that is on account of and~~

corresponds with a change made under another employer plan (including a plan of the Employer or of another employer) if:

The other cafeteria plan or Qualified Benefits Plan permits participants to make an election change that would be permitted under paragraphs (b) through (g) of Treasury RegulationSection 1.125-4 (disregarding Treasury Regulation Section 1.125-4(f)(4)); or

(A) The Plan permits Participants to make an election for a Plan Year that is different from the plan year under the other cafeteria plan or Qualified Benefits Plan.

(4) Loss of Coverage Under Other Group Health Coverage. A Participant may make an election on a prospective basis to add coverage under the Plan for the Participant, spouse, or Dependent if the Participant, spouse, or Dependent loses coverage under any group health coverage sponsored by a governmental or educational institution, including the following:

(A) A state's children's health insurance program under Title XXI of the Social Security Act;

(B) A medical care program of an Indian Tribal government, the Indian Health Service, or a tribal organization;

(C) A state health benefits risk pool; or

(D) A foreign government group health plan.

(b) Change in Status. A Participant may revoke an election during a Plan Year and make a new election for the remaining portion of the Plan Year if both (1) and (2) below are satisfied.

(1) One of the following change-in-status events occurs:

(A) Legal Marital Status. An event that changes a Participant's legal marital status, including marriage, death of spouse, divorce, legal separation, and annulment.

(B) Number of Dependents. An event that changes a Participant's number of Dependents, including birth, death, adoption, and placement for adoption (as defined in regulations under Code Section 9801).

(C) Employment Status. Any of the following events that change the employment status of the Participant, the Participant's spouse, or the Participant's Dependent: a termination or commencement of employment; a strike or lockout; a

commencement of or return from an unpaid leave of absence; and a change in worksite. In addition, if the eligibility conditions of the cafeteria plan or other employee benefit plan of the employer of the Participant, spouse, or Dependent depend on the employment status of that individual and there is a change in that individual's employment status with the consequence that the individual becomes (or ceases to be) eligible under the plan, then that change constitutes a change in employment under this 4.3(b)(1)(C). If a Participant terminates employment and cancels coverage during the period of unemployment, and resumes employment within 30 days (without any other intervening event that would permit a change in election), the Participant's prior election for the Plan Year is automatically reinstated. If a Participant terminates employment and cancels coverage during the period of unemployment, and resumes employment more than 30 days following termination, the Participant may return to the election in effect prior to termination of employment or make a new election under the Plan.

(D) Dependent Satisfies or Ceases to Satisfy Eligibility Requirements. An event that causes a Participant's Dependent to satisfy or cease to satisfy the eligibility requirements for coverage due to attainment of age, student status, or any similar circumstance.

(E) Residence. A change in the place of residence of the Participant, spouse, or Dependent.

(F) Nondependent Children. A change-in-status event described above that affects a Participant's child who is under age 27 and not a Dependent, including becoming newly eligible for coverage or eligible for coverage beyond the date on which the child otherwise would have lost coverage.

This subsection (F) shall be effective on the first day of the first Plan Year beginning after March 30, 2010.

(2) The election change satisfies the following consistency rules:

(A) An election change satisfies the requirements of this 4.3(b)(2) if the election change is on account of and corresponds with a change in status that affects eligibility for coverage under an employer's plan. A change in status that affects eligibility under an employer's plan includes a change in status that results in an increase or decrease in the number of a Participant's family

~~members or Dependents who may benefit from coverage under the plan. An election change also satisfies the requirements of this 4.3(b)(2) if the election change is on account of and corresponds with a change in status that affects expenses described in Code Section 129 (including employment-related expenses as defined in Code Section 21(b)(2)) with respect to dependent care assistance.~~

~~(B) If the change in status is the Participant's divorce, annulment, or legal separation from a spouse, the death of a spouse or Dependent, or a Dependent ceasing to satisfy the eligibility requirements for coverage, a Participant's election under the Plan~~

to cancel accident or health insurance coverage for any individual other than the spouse involved in the divorce, annulment, or legal separation, the deceased spouse or Dependent, or the Dependent that ceased to satisfy the eligibility requirements for coverage, respectively, fails to correspond with that change in status. In addition, if a Participant, spouse, or Dependent gains eligibility for coverage under a Family Member Plan as a result of a change in marital status under 4.3(b)(1)(A) or a change in employment status under 4.3(b)(1)(C), a Participant's election under the Plan to cease or decrease coverage for that individual under the Plan corresponds with that change in status only if coverage for that individual becomes applicable or is increased under the Family Member Plan.

(c) Special Enrollment Rights. To the extent that the group health plan benefits described in 4.1 are subject to the special enrollment rules provided in Section 2701(f) of the Public Health Service Act, a Participant who is entitled to special enrollment rights may revoke his or her election with respect to coverage under such group health plan during a Plan Year and make a new election that corresponds with the special enrollment rules.

(d) Judgment, Decree, or Order. The Plan Administrator may change a Participant's election to provide group health plan coverage for the Participant's child (or for a foster child who is a Dependent of the Participant) if a judgment, decree, or order resulting from a divorce, legal separation, annulment, or change in legal custody requires accident or health coverage for the child under the Participant's plan. A Participant may change his or her election to cancel group health plan coverage for the child if such an order requires the spouse, former spouse, or other individual to provide coverage for the child, and that coverage is, in fact, provided.

(e) Entitlement to Medicare or Medicaid. A Participant may prospectively cancel or reduce the Participant's, spouse's, or Dependent's coverage under an accident or health plan if the Participant, spouse, or Dependent becomes entitled to coverage (i.e., becomes enrolled) under Part A or Part B of Title XVIII of the Social Security Act (Medicare) or Title XIX of the Social Security Act (Medicaid), other than coverage consisting solely of benefits under Section 1928 of the Social Security Act (the program for distribution of pediatric vaccines). In addition, if a Participant, spouse, or Dependent who has been entitled to such coverage under Medicare or Medicaid loses eligibility for such coverage, the Participant may make a prospective election to commence or increase the Participant's, spouse's, or Dependent's coverage under the accident or health plan.

(f) Family and Medical Leave Act. A Participant taking leave under the Family and Medical Leave Act ("FMLA") may revoke an existing election of accident or health plan coverage and make such other election for the remaining portion of the Plan Year as may be provided for under the FMLA.

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

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

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

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

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

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

~~(2) **Enrollment in a Qualified Health Plan Through an Exchange**.~~ ~~An election change may be made due to enrollment in a qualified health plan if both (A) and (B) are satisfied.~~

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

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

ARTICLE 5

CREDITS AND REIMBURSEMENT PROCEDURES

5.1 Credits to Plan. The following rules shall govern the Compensation reduction credits to this Plan during a Plan Year:

(a) Establishment of Accounts. For each Participant, the Plan Administrator shall establish a separate Account for each reimbursement benefit under 4.1 for the Plan Year.

(b) Compensation Reduction Credits. For each Participant, the amount by which the Participant elects to reduce his or her Compensation for a specific benefit shall be deducted from the Participant's Compensation during the Plan Year by payroll deduction and credited to the Participant's Account for such benefit, credited against the cost of that benefit as determined by the Plan Administrator, or, for HSA contributions, deposited with the HSA trustee/custodian maintaining the Participant's HSA.

(c) District Contributions. Prior to the beginning of each Plan Year, the District shall determine the amount to be credited to each Participant for the purchase of benefits described in 4.1. The amount so established for each Plan Year shall be set forth in Exhibit C, to be attached hereto and incorporated by reference herein. The Plan Administrator may change the District contribution amount set forth in Exhibit C without amending this Plan. District contributions or credits may be made in substantially ratable installments throughout the Plan Year.

(d) Records of Contributions. The Plan Administrator shall maintain appropriate records and shall record the amounts credited for a Participant for a specified benefit under (b) and (c) above in the Participant's Account established for such benefit.

(e) Allocation of Expense. An eligible Dependent Care Expense submitted for reimbursement by a Participant shall be paid only from the Account established for such Participant for such expense and only to the extent of the amount recorded in the Account (after deducting earlier reimbursements made during the Plan Year). The maximum amount of Health Care Expense reimbursement under Article 9 or Dental and Vision Care Expense reimbursement under Article 10 must be available at all times during the Plan Year (properly reduced as of any particular time for prior reimbursements for the same Plan Year). Thus, the maximum amount of Health Care Expense or Dental and Vision Care Expense reimbursements at any particular time during the Plan Year cannot be limited to the amount recorded in the applicable Account at that time. Reimbursement will be deemed to be available at all times if it is paid at least monthly or when the total amount of the claims to be submitted is at least a specified, reasonable minimum amount (e.g. $50).

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

~~(d) **Procedures.** A Participant must make a written request to the Plan Administrator to receive a qualified reservist distribution. The Plan Administrator must receive a copy of the order or call to active duty before a distribution can be made. Only one qualified reservist distribution is permitted with respect to a Participant during a Plan Year. A Participant may submit requests for reimbursement for medical expenses incurred before the date of the request for a qualified reservist distribution and such reimbursements will be paid in accordance with Article 5 (taking into account the amount of the qualified reservist distribution as a reimbursement). A Participant may not submit requests for reimbursement for medical expenses incurred on or after the date of the request for distribution.~~

~~(e) **Timing of Requests and Distributions.** A request for a qualified reservist distribution must be made on or after the date of the order or call to active duty and before the last day of the Plan Year during which the order or call to active duty occurred. The health care reimbursement account program or dental and vision care reimbursement account program, as applicable, shall pay the qualified reservist distribution to the Participant within a reasonable time, but not more than 60 days after the date of the request for a distribution. A qualified reservist distribution may not be made with respect to a Plan Year ending before the order or call to active duty.~~

ARTICLE 6

CLAIMS PROCEDURE

6.1 Initial Claim. Any person claiming a premium payment benefit under this Plan shall present the claim in writing to the Plan Administrator. Any person claiming a Dependent Care Expense Reimbursement Benefit, a Health Care Expense Reimbursement Benefit, or a Dental and Vision Care Expense Reimbursement Benefit under this Plan shall present the claim in writing to the entity that administers those benefits ("Claim Reviewer"). For purposes of this article, the person claiming a benefit (or his or her authorized representative) shall be referred to as the "Claimant."

6.2 Decision on Initial Claim.

(a) Time Period for Denial Notice. A decision shall be made on the claim as soon as practicable and shall be communicated in writing by the Plan Administrator or Claim Reviewer to the Claimant within a reasonable period after receipt of the claim by the Plan Administrator or Claim Reviewer.

(b) Contents of Notice. If the claim is wholly or partially denied, the notice of denial shall indicate:

(1) The specific reasons for the denial;

(2) The specific references to pertinent Plan provisions on which the denial is based;

(3) A description of additional material or information necessary for the Claimant to perfect the claim and an explanation of why such material or information is necessary; and

(4) An explanation of the Plan's claim review procedure.

6.3 Review of Denied Claim. If a Claimant receives a notice of denial, the Claimant may request a review of the claim. The request for review is made by personally delivering or mailing a written request for review, prepared by either the Claimant or his or her authorized representative, to the Plan Administrator. The Claimant's request for review must be made within 60 days after receipt of the notice of denial. If the written request for review is not made on a timely basis, the Claimant shall be deemed to waive his or her right to review. The Claimant or his or her duly authorized representative may, at or after the time of making the request, review all pertinent documents and submit issues and comments in writing.

If a Claimant requests a review of a claim under the health care reimbursement account program, only the employee described in 9.7(b)(3) may review denied claims. Such employee shall act on behalf of the Plan Administrator in reviewing and deciding denied claims.

6.4 Decision on Review. A review shall be made by the Plan Administrator after receipt of a timely filed request for review. A decision on review shall be made and furnished in writing to the Claimant. The decision shall be made within a reasonable period of

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

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

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

ARTICLE 7

PLAN ADMINISTRATION

7.1 Appointment of Plan Administrator. The District shall appoint one or more persons to act as the Plan Administrator and to serve for such terms as the District may designate or until a successor has been appointed or until removed by the District. Vacancies due to resignation, death, removal or other causes shall be filled by the District. The Plan Administrator shall be bonded except as may otherwise be allowed by law. The Plan Administrator may be paid reasonable compensation for its service; however, a Plan Administrator who is a full-time employee of the District shall serve without compensation. All reasonable expenses of the Plan Administrator shall be paid by the District. If a designation of a Plan Administrator is not made, the District shall be the Plan Administrator.

7.2 Rights and Duties. The Plan Administrator shall be the named fiduciary of the Plan. The Plan Administrator, on behalf of the Participants and their beneficiaries, shall have the authority to control and manage the operation and administration of the Plan and shall have all powers necessary to accomplish those purposes. The responsibility and authority of the Plan Administrator shall include, but shall not be limited to, the following:

(a) Determining all questions relating to the eligibility of employees to participate;

(b) Computing and certifying the amount and kind of benefits payable to Participants, spouses, and dependents;

(c) Authorizing all disbursements;

(d) Maintaining all necessary records for the administration of the Plan other than those that the District has specifically agreed to maintain;

(e) Interpreting the provisions of the Plan and publishing such rules for the regulation of the Plan as are deemed necessary and not inconsistent with the terms of the Plan; and

(f) Directing the District to make payments to Participants, former Participants, spouses, and dependents in accordance with the provisions of the Plan.

7.3 Information, Reporting, and Disclosure. To enable the Plan Administrator to perform its functions, the District shall supply full and timely information to the Plan Administrator on all matters relating to the Participants and such other pertinent facts as the Plan Administrator may require. The Plan Administrator shall have the responsibility of complying with the reporting and disclosure requirements of applicable law.

7.4 Independent Qualified Accountant. If required by applicable law or regulation, the Plan Administrator shall engage, on behalf of all Plan Participants, an

~~independent qualified public accountant who shall conduct such examinations of the financial statements of the Plan and of other books and records of the Plan as the accountant may deem necessary to enable the accountant to form an opinion as to whether the financial statements and schedules required by law to be included in any reports are presented fairly and in conformity with generally accepted accounting principles.~~

~~**7.5 Allocation and Delegation of Responsibility.** The Plan Administrator may allocate fiduciary responsibilities to one or more persons and may delegate to such persons the authority to carry out fiduciary responsibilities under the Plan.~~

~~The Plan Administrator, in making the above allocation of fiduciary responsibilities, may provide that a person or group of persons may serve, with respect to the Plan, in more than one fiduciary capacity.~~

~~The Plan Administrator or persons to whom fiduciary responsibilities have been delegated by the Plan Administrator may employ one or more persons to render advice with regard to any responsibility such fiduciary has under the Plan.~~

~~In the event a fiduciary responsibility is allocated to a person, no other person shall be liable for any act or omission of the person to whom the responsibility is allocated except as may be otherwise required by law. If a fiduciary responsibility is delegated to a person other than the Plan Administrator, the Plan Administrator shall not be responsible or liable for an act or omission of such person in carrying out such responsibility except as may otherwise be required by law.~~

~~**7.6 Indemnification.** The District hereby indemnifies and holds harmless the Plan Administrator and each person to whom a fiduciary responsibility is allocated from any loss, claim, or suit arising out of the performance of obligations imposed hereunder and not arising from the Plan Administrator's or the person's willful neglect, misconduct, or gross negligence.~~

ARTICLE

MISCELLANEOUS

8.1 Right to Amend and Terminate. The District represents that the Plan is intended to be a continuing program for Participants but reserves the right to terminate the Plan at any time. The District may modify, alter, or amend this Plan in whole or in part.

8.2 Unsecured Right to Payment. No employee shall by virtue of this Plan have any interest in any specific asset or assets of the District. An employee has only an unsecured contract right to receive benefits in accordance with the provisions of the Plan.

8.3 No Obligation to Fund. The District shall have no obligation to establish a trust or fund for the payment of benefits or to insure any of the benefits.

8.4 No Interest. The District shall have no obligation to pay interest on any Participant's salary reduction amounts or Accounts used to provide the benefits under this Plan.

8.5 Provision Against Anticipation. No Participant shall have the right or power to alienate, anticipate, commute, pledge, encumber, or assign any of the benefits or proceeds recorded for the Participant under the terms of this Plan, and no such benefits or proceeds shall be subject to seizure by any creditor of the Participant under any writ or proceedings at law or in equity.

8.6 Right to Discharge Employees. Neither the establishment of this Plan, nor any modification thereof, nor the payment of any benefit, shall be construed as giving any Participant or any other person any legal or equitable right against the District unless the same shall be specifically provided for in this Plan, nor as giving any employee or Participant the right to be retained in the District's employ. All employees shall remain subject to discharge by the District to the same extent as if this Plan had never been adopted.

8.7 Construction. This Plan shall be construed in accordance with applicable federal law and regulations issued thereunder and, to the extent applicable, the laws of the state of Oregon.

8.8 Legally Enforceable. The District intends that the Plan terms, including those relating to coverage and benefits, are legally enforceable. The Plan is maintained for the exclusive benefit of employees.

ARTICLE 9

HEALTH CARE REIMBURSEMENT ACCOUNT PROGRAM

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

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

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

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

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

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

9.4 Administration. The plan administrator of this health care reimbursement account program shall be the same as for the Portland Public Schools Cafeteria Plan. The procedures for making and reviewing claims, plan administration, elections and revocation of elections, and reimbursement requests and payments, shall be as set forth in the Portland Public Schools Cafeteria Plan.

9.5 Continuation Coverage. To the extent that this health care reimbursement account program is a group health plan, it is subject to the continuation coverage requirements under the Consolidated Omnibus Budget Reconciliation Act of 1985, as amended ("COBRA"), as presently set forth in Sections 2201 through 2208 of the Public Health Service Act. Accordingly, this program shall be construed in accordance with COBRA and the applicable regulations thereunder.

~~**9.6 Military Service.**~~

~~**(a) General.** The health care reimbursement account program shall comply with the Uniformed Services Employment and Reemployment Rights Act of 1994 ("USERRA"). The USERRA provisions contained in 38 USC Section 4301 et seq are incorporated by reference.~~

~~**(b) Qualifying Reemployment.** If a Participant is absent from employment due to service in the uniformed services as defined in 38 USC Section 4301(13) ('military service"), the Participant is entitled to reemployment rights and benefits if the following conditions are satisfied ("qualifying reemployment"):~~

~~(1) The Participant, or an appropriate officer of the uniformed service, must provide advance written or oral notice of the military service to the District. Notice is not required if it is precluded by military necessity or is otherwise impossible or unreasonable as described in 20 CFR Section 1002.86.~~

~~(2) The Participant's military absence from the District must be for a cumulative period of less than five years. The Participant may be absent from employment for more than five years if the longer period of time is necessary to complete an initial period of obligated service or a Participant is ordered to or retained on active duty as described in 38 USC Section 4312(c) and 20 CFR Section 1002.103.~~

~~(3) The Participant must report to, or apply for reemployment with, the District within a certain number of days after the completion of military service. The period in which to report to the District or apply for reemployment is determined by reference to the period of military service as follows:~~

~~(A) If the period of military service is less than 31 days, or if the absence from employment is for the purposes of an examination to determine the Participant's fitness for military service, the Participant must report to the District not later than the first work day following completion of the military service and the expiration of eight hours after a period allowing for safe transportation to the Participant's residence.~~

~~(B) If the period of military service is for more than 30 days but less than 181 days, the Participant must submit an application for reemployment (written or oral) not later than 14 days after completion of the military service.~~

~~(C) If the period of military service is for more than 180 days, the Participant must submit an application for reemployment (written or oral) not later than 90 days after completion of military service.~~

(D) If the Participant is hospitalized for, or convalescing from, an illness or injury incurred in, or aggravated during, military service, the Participant shall report to the District or submit an application for reemployment at the end of the recovery period. The recovery period may not exceed two years.

The foregoing periods may be extended pursuant to 38 USC Section 4312(e) and 20 CFR Sections 1002.115-1002.117 if reporting to the District or applying for reemployment is impossible or unreasonable through no fault of the Participant.

(4) The Participant did not receive a type of discharge or separation from service described in 38 USC Section 4304 and 20 CFR Section 1002.135.

(5) If the military service exceeds 30 days, the Participant must provide, upon the District's request, documentation to establish that the requirements of 9.6(b)(2), (3), and (4) above are satisfied. This 9.6(b)(5) shall not apply if such documentation does not exist or is not readily available.

(c) Continuation of Coverage.

(1) Election of Continuation Coverage. If a Participant is absent from employment due to military service, the Participant may elect to continue the Participant's and any Dependent's coverage.

This paragraph shall be effective January 18, 2006. Coverage shall terminate on the date described in 3.2 and shall be retroactively reinstated if the Participant elects to continue coverage and pays all premiums due within the periods described below. To the extent consistent with USERRA, an election to continue coverage must be made in the same manner and time periods applicable to an election of COBRA coverage. Notwithstanding the foregoing, if the Participant does not provide advance notice of the military service because it is precluded by military necessity or is otherwise impossible or unreasonable, the election of USERRA continuation coverage must be made within 60 days after the date it becomes possible and reasonable to make the election or, if later, by the end of the COBRA election period. Notwithstanding the foregoing, if the Participant leaves employment without giving advance notice of the military service (which is not excused as described above), the Participant shall have no right to elect USERRA continuation coverage.

(2) Duration of Continuation Coverage. The maximum period of coverage shall be the lesser of:

(A) The 24-month period (18-month period with respect to elections made before December 10, 2004) beginning on the date on which the Participant's absence begins; or

(B) The period beginning on the date on which the Participant's absence begins and ending on the day after the date on which the Participant fails to report or apply for reemployment as described in 9.6(b)(3).

(3) Premiums. A Participant who elects to continue coverage may be required to pay not more than 102 percent of the full premium, except that a Participant who performs military service for less than 31 days may not be required to pay more than the employee share for the coverage.

This paragraph shall be effective January 18, 2006. To the extent consistent with USERRA, premiums are due on the due dates applicable to premiums for COBRA coverage. Notwithstanding the foregoing, if it is precluded by military necessity or is otherwise impossible or unreasonable for a Participant to pay a premium by the due date, such Participant must pay the premium within 30 days after the date it becomes possible and reasonable for him or her to do so.

(4) Termination of Continuation Coverage. This paragraph shall be effective January 18, 2006. To the extent consistent with USERRA, USERRA continuation coverage shall be terminated if premiums are not paid by the due date described in 9.6(c)(3) or if a Participant receives a type of discharge or separation from service described in 38 USC Section 4304 and 20 CFR Section 1002.135.

(d) Reinstatement of Coverage. If a Participant's or Dependent's coverage terminates due to the Participant's military service, the coverage shall be reinstated upon qualifying reemployment. An exclusion or waiting period shall not be imposed on the Participant or any Dependents in connection with the reinstatement of coverage upon qualifying reemployment if an exclusion or waiting period would not have been imposed had the coverage not been terminated due to military service. The preceding sentence shall not apply to the coverage of any illness or injury determined by the Secretary of Veterans Affairs or his or her representative to have been incurred in, or aggravated during, military service.

9.7 Protected Health Information.

(a) Hybrid Entity. The Plan is a hybrid entity within the meaning of 45 CFR Section 164.103. The health care reimbursement account program is the health care component of the Plan. As provided in 45 CFR Section 164.105(a), the privacy rules under the Health Insurance Portability and Accountability Act of 1996 ("HIPAA") apply only to the health care component of the Plan. The health care component shall not disclose protected health information, as defined in 45 CFR Section 164.103 ("PHI") to a non-health care component of the Plan in circumstances in which the HIPAA privacy rules would prohibit such disclosure if the health care component and the other component were separate legal entities.

~~(b) Disclosure of Protected Health Information to the District.~~

~~(1) Permitted and Required Uses and Disclosures of Protected Health Information.~~

~~(A) Plan Administration Functions. Subject to the conditions of disclosure described in 9.7(b)(2), (3), and (4), the health care reimbursement account program, or the program's business associate, may disclose PHI to the District for plan administration functions. Plan administration functions means administration functions performed by the District on behalf of the program, such as quality assurance, claims processing, auditing, and monitoring. Plan administration functions are limited to activities that would meet the definition of payment or health care operations, as defined in 45 CFR Section 164.501, but do not include functions to modify, amend, or terminate the program or solicit bids from prospective issuers. Plan administration functions do not include any employment-related functions or functions in connection with any other benefits or benefit plans. These permitted and required uses and disclosures may not be inconsistent with 45 CFR Part 164, Subparts C and E.~~

~~(B) Enrollment and Disenrollment Information. The program, or the program's business associate, may disclose to the District information on whether the individual is participating in the program. Such disclosure is not subject to 9.7(b)(2), (3), and (4).~~

~~(C) Summary Health Information. The program, or the program's business associate, may disclose summary health information, as defined in 45 CFR Section 164.504(a), to the District, provided the District requests the summary health information for the purpose of modifying, amending, or terminating the program and the disclosure does not violate 45 CFR Section 164.502(9)(5)(i). Such disclosure is not subject to 9.7(b)(2), (3), and (4).~~

~~(2) Conditions of Disclosure for Plan Administration Functions. Disclosure of PHI to the District under 9.7(b)(1)(A) is permitted only upon receipt of a certification from the District that the Plan has been amended and the District has agreed to the following conditions regarding the use and disclosure of PHI. The District will:~~

~~(A) Not use or further disclose PHI other than as permitted or required by the program or as required by law;~~

~~(B) Ensure that any subcontractors or agents to whom the District provides PHI received from the program agree to the~~

~~Third Amendment October 1, 2013 (9.7(b)(1)(C) eff~~

same restrictions and conditions that apply to the District with respect to such information;

(C) Not use or disclose PHI for employment-related actions and decisions or in connection with any other benefit or employee benefit plan of the District;

(D) Report to the program any use or disclosure of PHI that is inconsistent with the uses and disclosures provided for in the program or under HIPAA, of which it becomes aware;

(E) Make available PHI to comply with HIPAA's right to access in accordance with 45 CFR Section 164.524;

(F) Make available PHI for amendment and incorporate any amendments to PHI in accordance with 45 CFR Section 164.526;

(G) Make available the information required to provide an accounting of disclosures in accordance with 45 CFR Section 164.528;

(H) Make its internal practices, books, and records relating to the use and disclosure of PHI received from the program available to the Secretary of the Department of Health and Human Services ("DHHS"), or any other officer or employee of DHHS to whom such authority has been delegated, for purposes of determining compliance by the program with 45 CFR, Part 164, Subpart E;

(I) If feasible, return or destroy all PHI received from the program that the District still maintains in any form and retain no copies of such information when no longer needed for the purpose for which disclosure was made, except that, if such return or destruction is not feasible, limit further uses and disclosures to those purposes that make the return or destruction of the information infeasible; and

(J) Ensure that adequate separation between the program and the District, as required in 45 CFR Section 164.504(f)(2)(iii), has been established.

(3) Adequate Separation Between the Program and the District. The District's Benefits Manager will have access to PHI under 9.7(b)(1)(A). The Benefits Manager shall only have access to and use of PHI to the extent necessary to perform the plan administration functions that the District performs for the program.

In the event that the Benefits Manager uses or discloses PHI in a way prohibited by the program or HIPAA, the District shall impose sanctions to ensure

that no further non-compliance occurs. Such sanctions may include an oral warning, a written warning, time off without pay, or termination of employment. The District shall determine the appropriate sanction based on the severity of the violation.

(4) Conditions of Disclosure of Electronic Protected Health Information. The provisions of this 9.7(b)(4) shall be effective April 20, 2006. Disclosure of electronic PHI, as defined in 45 CFR Section 160.103, to the District under 9.7(b)(1)(A) is permitted if the following rules are satisfied. The District will reasonably and appropriately safeguard electronic PHI created, received, maintained, or transmitted to or by the District on behalf of the program. The District will:

(A) Implement administrative, physical, and technical safeguards that reasonably and appropriately protect the confidentiality, integrity, and availability of the electronic PHI that it creates, receives, maintains, or transmits on behalf of the program;

(B) Ensure that any agent, including a subcontractor, to whom it provides such electronic PHI agrees to implement reasonable and appropriate security measures to protect the information;

(C) Ensure that the adequate separation required by 45 CFR Section 164.504(f)(2)(iii) and 9.7(b)(3) is supported by reasonable and appropriate security measures; and

(D) Report to the program any security incident of which it becomes aware.

9.8 Rescissions. This health care reimbursement account program will not rescind an individual's coverage under the program unless the individual (or a person seeking coverage on his or her behalf) performs an act, practice, or omission that constitutes fraud or makes an intentional misrepresentation of material fact, both of which are prohibited by the program. A rescission is as defined in 45 CFR § 147.128 or subsequent guidance. To the extent consistent with such guidance, a rescission is a cancellation or discontinuance of coverage that has retroactive effect (other than one due to a failure to timely pay required contributions). The program must provide at least 30 days advance written notice to each affected individual before coverage may be rescinded.

A Participant is prohibited from submitting for reimbursement an expense incurred by an individual other than the individuals described in 2.11. By submitting an expense for reimbursement, the Participant is making a representation that the expense is a Health Care Expense under 2.11. Whether an expense was incurred by an individual described in 2.11 is a material fact. The coverage of an individual who is not described in 2.11 may be rescinded if the requirements of this section are satisfied.

~~**9.9 Mandatory Conversion of Account.** The health care reimbursement Account of an Eligible Employee who is a Participant in this health care reimbursement account program immediately prior to October 1, 2013, and elects the Health Savings Account Benefit under 4.1(e) effective October 1, 2013, shall be converted, on a mandatory basis, to a dental and vision care reimbursement Account for the period of October 1, 2013, through December 31, 2013.~~

ARTICLE 10

DENTAL AND VISION CARE REIMBURSEMENT ACCOUNT PROGRAM

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

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

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

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

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

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

~~**10.4 Other Provisions.** The provisions contained in 9.4 through 9.7 apply to this dental and vision care reimbursement account program and are hereby incorporated by reference into this Article 10.~~

ARTICLE 11

DEPENDENT CARE REIMBURSEMENT ACCOUNT PROGRAM

11.1 Separate Program. This article is intended to qualify as a separate written dependent care assistance program within the meaning of Code Section 129. It is intended that reimbursements under this program be eligible for exclusion from the gross income of Participants under Code Section 129(a). Accordingly, this program shall be interpreted and construed in accordance with Code Section 129 and any regulations or other interpretations thereunder. To the extent that the requirements for such exclusion change under applicable federal law, the limitations and other rules set forth in this article shall automatically change to be consistent with such law.

This program represents one benefit that may be elected by Participants under the Portland Public Schools Cafeteria Plan, and a Participant under that Plan who elects the Dependent Care Reimbursement Benefit thereunder is deemed to be a Participant under this dependent care reimbursement account program, provided the Participant has one or more qualifying individuals at the time an election is permitted under the Portland Public Schools Cafeteria Plan. A "qualifying individual" means (a) a dependent of the Participant (as defined in Code Section 152(a)(1)) who is under age 13, or (b) a dependent (as defined in Code Section 21(b)(1)(B)) or the spouse of the Participant, if the dependent or spouse is physically or mentally incapable of self-care and has the same principal place of abode as the Participant for more than one-half of the taxable year. An individual shall not be treated as having the same principal place of abode as the Participant if at any time during the taxable year the relationship between the individual and the Participant is in violation of local law.

11.2 Nondiscrimination Requirements. The contributions and benefits provided under this program shall not discriminate in favor of highly compensated employees (as defined in Code Section 414(q)) or their dependents. The average benefits provided under all dependent care assistance programs of the District to nonhighly compensated employees must be at least 55 percent of the average benefits provided to highly compensated employees under all such programs.

11.3 Limitations. The amount of coverage that may be elected under this dependent care reimbursement account program for a Plan Year is limited to $5,000 (the limit is $2,500 for a married Participant who files a separate federal income tax return for the Plan Year); provided, however, that the coverage for an unmarried Participant shall not exceed the Participant's earned income for the Plan Year, and the coverage for a married Participant shall not exceed the lesser of the Participant's earned income or the spouse's earned income for the Plan Year. "Earned income" means wages, salaries, tips, and other employee compensation, but only if such amounts are includible in gross income for the taxable year, plus the amount of net earnings from self-employment for the taxable year. Earned income shall be computed without regard to any community property laws. Amounts received from pensions and annuities are not included. Amounts to which Code Section 871(a) applies are not included. Earned income shall not include any amounts paid or incurred by any employer for the Participant under this or any other dependent care assistance program. The earned income of a Participant's spouse for any month during which the spouse is a full-time student at an educational institution described in

Code Section 170(b)(1)(A)(ii) or is physically or mentally incapable of self-care shall be deemed to be not less than $250 (if the Participant has one qualifying individual for the Plan Year), or $500 (if the Participant has two or more qualifying individuals for the Plan Year). A full-time student is an individual who is enrolled at and attends the educational institution during each of five calendar months of the individual's taxable year for the number of course hours that is considered to be a full-time course of study. The enrollment for five calendar months need not be consecutive. School attendance exclusively at night does not constitute a full-time course of study. However, a full-time course of study may include some attendance at night.

11.4 Dependent Care Expenses. Dependent Care Expenses mean expenses for household services and expenses for the care of a qualifying individual, but only if the expenses are incurred to enable the Participant to be employed by the District for a period during which the Participant has a qualifying individual. Expenses for services outside the Participant's household will qualify only if the expenses are for the care of a dependent (as defined in Code Section 152(a)(1)) who is under age 13, or for the care of a qualifying individual who regularly spends at least eight hours each day in the Participant's household. If the outside services are provided by a dependent care center as defined in Code Section 21(b)(2)(D), the expense will qualify only if the dependent care center complies with all applicable laws and regulations of the applicable state or unit of local government. Dependent Care Expenses do not include expenses for services performed by an individual for whom a personal income tax exemption is allowable either to the Participant or the spouse, or expenses for services of a son, stepson, daughter, stepdaughter, or eligible foster child (as defined in Code Section 152(f)(1)(C)) of the Participant who has not attained age 19 at the close of the taxable year. For purposes of the preceding sentence, a Participant's child shall include a Participant's legally adopted child and a child placed with the Participant for adoption.

11.5 Administration. The plan administrator of this dependent care reimbursement account program shall be the same as for the Portland Public Schools Cafeteria Plan. The procedures for making and reviewing claims, plan administration, elections and revocation of elections, and reimbursement requests and payments shall be as set forth in the Portland Public Schools Cafeteria Plan.

ARTICLE 12

HEALTH SAVINGS ACCOUNT

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

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

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

(a) The prorated amount described in the preceding sentence; or

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

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

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

~~The HSA is not an employer-sponsored employee benefit plan. It is a savings account that is established and maintained by an HSA trustee or custodian outside this Plan to be used primarily for reimbursement of "qualified medical expenses" as set forth in Code Section 223(d)(2). The District has no authority or control over the Participant's use of the amounts contributed to the HSA, the investment or distribution of such amounts, or any other aspect of the HSA's administration. The District's sole duty is to forward the District contributions and Compensation reduction amounts elected by the Participant to the HSA custodian or trustee. Even though this Plan allows pre-tax Compensation reduction contributions to an HSA, the HSA is not intended to be a benefit plan sponsored or maintained by the District.~~

~~The District has caused this amended and restated Plan to be executed by its duly authorized representative as of the date set forth below.~~

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

~~By: _____~~

~~Date: _____~~

EXHIBIT A
PORTLAND PUBLIC SCHOOLS
CAFETERIA PLAN

Plan Years
(Referent Section 2.16)

The Plan Years of the separate premium payment benefits are as follows:

FEBRUARY 1 – JANUARY 31 PLAN YEAR

ATU/DCU/PFTCE
Full-Time and Part-Time Option 1 Employees:

- Kaiser
- Providence Personal Option Plan
- Providence Point of Service
- Trust Dental Plan
- Providence Vision
- Kaiser Vision
- VSP Vision
- Walgreens Prescription Mail Service
- Postal Prescriptions Mail Service
- Wellpartners Prescription Mail Service
- Providence Pharmacy Plan
- Kaiser Mail Service Pharmacy
- Caremark Mail Service Pharmacy
- Caremark Pharmacy Plan

Part-Time Option 2 Employees:

- Kaiser
- Providence Open Option Plan
- Providence Personal Option Plan
- Walgreens Prescription Mail Service
- Postal Prescriptions Mail Service
- Wellpartners Prescription Mail Service
- Providence Pharmacy Plan
- Kaiser Mail Service Pharmacy
- Caremark Mail Service Pharmacy
- Caremark Pharmacy Plan

PAT

Full-Time and Part-Time Option 1 Employees:

- Kaiser
- Trust Preferred Provider Plan
- Providence Personal Option Plan
- Trust Dental Plan
- Kaiser Pharmacy Plan
- Providence Pharmacy Plan
- Caremark Pharmacy Plan
- Caremark Mail Service Pharmacy
- Kaiser Mail Service Pharmacy
- Providence Mail Service Pharmacy
- Trust Vision Plan
- Kaiser Vision Plan
- Trust Vision Plan

Part-Time Option 2 Employees:

- Kaiser
- Trust Indemnity Plan
- Providence Personal Option Plan
- Caremark Prescription Plan
- Caremark Mail Service Pharmacy
- Kaiser Pharmacy Plan
- Kaiser Mail Service Pharmacy

OCTOBER 1 – SEPTEMBER 30 PLAN YEAR

NON REPRESENTED AND SEIU EMPLOYEES

Full-Time and Part-Time Employees:

- OEBB – ODS Medical Plan 6 PPO
- OEBB – ODS Medical Plan 7 PPO
- OEBB – ODS Medical Plan 9 – High Deductible Plan
- OEBB – Kaiser Medical Plan 1A
- OEBB – ODS Dental Plan 4
- OEBB – Kaiser Dental Plan 8
- OEBB – ODS Vision Plan 2
- OEBB – Kaiser Vision Plan 5
- OEBB – Kaiser Pharmacy Plan A
- OEBB – ODS Pharmacy Plan A
- OEBB – ODS Integrated Pharmacy Plan
- OEBB – Kaiser Orthodontia Plan A
- OEBB – ODS Orthodontia Plan

~~**DCU TEAMSTERS**~~

~~**Full-Time and Part-Time Employees:**~~

- ~~Teamsters Trust Medical Plan A~~
- ~~Teamsters Kaiser Permanente Plan A~~
- ~~Providence Health Plan PPO Plan A~~
- ~~Teamsters Trust Kroger Pharmacy Plan A~~
- ~~Teamsters Trust Dental Plan A~~
- ~~Teamsters Trust VSP Vision Plan~~

~~**EXHIBIT B**~~
~~**PORTLAND PUBLIC SCHOOLS**~~
~~**CAFETERIA PLAN**~~

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

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

~~**EXHIBIT C**~~
~~**PORTLAND PUBLIC SCHOOLS**~~
~~**CAFETERIA PLAN**~~

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

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

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

	BOARD POLICY **CAFETERIA PLAN**	**5.10.090-P**

PORTLAND PUBLIC SCHOOLS
CAFETERIA PLAN

Amended and Restated
Effective January 1, 2006

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PORTLAND PUBLIC SCHOOLS

CAFETERIA PLAN

P A R T I E S

THIS AMENDED AND RESTATED PLAN is adopted effective January 1, 2006, by the School District No. 1, Multnomah County, Oregon ("District").

R E C I T A L S

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

The Plan was last amended effective January 1, 2005.

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

The District desires to amend the Plan to comply with changes in applicable federal law and in certain other respects, and to restate the Plan.

A M E N D M E N T A N D R E S T A T E M E N T

The PORTLAND PUBLIC SCHOOLS CAFETERIA PLAN is hereby amended and restated effective January 1, 2006, as set forth herein.

ARTICLE 1

NAME AND EFFECTIVE DATE

1.1 Name. This Plan shall be known as the Portland Public Schools Cafeteria Plan.

1.2 Effective Date. The effective date of this amended and restated Plan is January 1, 2006. The benefits payable to or on behalf of a Participant in the Plan in accordance with the following provisions shall not be affected by the terms of any amendment to the Plan adopted after the Participant separates from service with the District unless the amendment expressly provides otherwise.

ARTICLE 2

DEFINITIONS

Whenever used herein, unless the context clearly indicates otherwise, masculine, feminine, and neuter words may be used interchangeably, singular shall mean the plural and vice versa, and the following words and phrases shall have the following meanings when used with an initial capital letter:

2.1 "Account" means the separate record or records maintained by the Plan Administrator in the name of a Participant in accordance with this Plan.

2.2 "Benefit Package Option" means a qualified benefit under Code Section 125(f) that is offered under a cafeteria plan, or an option for coverage under an underlying accident or health plan (such as an indemnity option, an HMO option, or a PPO option under an accident or health plan).

2.3 "Code" means the Internal Revenue Code of 1986, as amended, and successor Codes thereto.

2.4 "Compensation" means an Eligible Employee's wages or salary from the District during the Plan Year for personal services rendered, including bonuses, overtime, commissions, and other forms of remuneration includable in gross income.

2.5 "Dental and Vision Care Expense" means an expense incurred by a Participant on behalf of the Participant or the Participant's spouse, Dependent, or child (as defined in Code Section 152(f)(1)) who has not attained age 27 as of the end of the Participant's taxable year, for dental or vision care as defined in Code Section 223(c) which is medical care as defined under Code Section 213(d), but only to the extent such expense is reimbursable under the separate dental and vision care reimbursement account program set forth in Article 10 and not used as a deduction on the Participant's federal income tax return.

2.6 "Dependent Care Expenses" means expenses described in 11.4 that are incurred by a Participant and are considered employment-related expenses as defined in Code Section 21(b)(2), but only to the extent that such amounts are reimbursable under the separate dependent care assistance program set forth in Article 11 and are not used by the Participant to obtain a credit against the Participant's federal income tax for employment-related expenses under Code Section 21.

2.7 "Dependent" means, for purposes of 2.10, 2.18, and 4.3, a person who is a Participant's dependent as defined in Code Section 152, except that, for purposes of accident or health coverage, any child to whom Code Section 152(e) applies is treated as a dependent of both parents, and, for purposes of dependent care assistance provided through a cafeteria plan, a dependent means a qualifying individual (as defined in Code Section 21(b)(1)) with respect to the Participant. For purposes of 2.5, 2.11, Article 9, and Article 10, a Dependent means a person who is a Participant's dependent as defined in Code Section 105(b).

2.8 "District" means School District No. 1, Multnomah County, Oregon.

2.9 "Eligible Employee" means any District employee, other than the following individuals:

(a) An employee who is a member of a collective bargaining unit that has bargained in good faith with the District over the benefits provided under this Plan and the bargaining agreement does not specifically require participation in this Plan;

(b) A student worker;

(c) An employee who is employed on an on-call basis, a limited-term employee, or an employee who does not have regularly scheduled hours of employment, including classified substitutes but excluding substitute teachers;

(d) A person who performs services for the District pursuant to an agreement between the District and an organization that leases employees (including a person who is not an employee, but who is treated as an employee, for purposes of Code Sections 106, 125, and 129, by reason of being a "leased employee" as defined in Code Section 414(n));

(e) A self-employed person as defined in Code Section 401(c);

(f) A person who performs services for the District but who is treated for payroll tax purposes as other than an employee of the District (and regardless whether the person may subsequently be determined by a governmental agency, by the conclusion or settlement of threatened or pending litigation, or otherwise to be or have been an employee of the District); and

(g) An employee who has regularly scheduled hours of employment but is less than half-time.

Notwithstanding the foregoing, substitute teachers are excluded from the definition of "Eligible Employee" for purposes of the Premium Payment Benefit described in 4.1(a) only.

2.10 "Family Member Plan" means a cafeteria plan or Qualified Benefits Plan sponsored by the employer of the Participant's spouse or the Participant's Dependent.

2.11 "Health Care Expense" means an expense incurred by a Participant on behalf of the Participant or the Participant's spouse, Dependent, or child (as defined in Code Section 152(f)(1)) who has not attained age 27 as of the end of the Participant's taxable year, for medical care as defined under Code Section 213(d), but only to the extent such expense is reimbursable under the separate health care reimbursement account program set forth in Article 9 and not used as a deduction on the Participant's federal income tax return.

2.12 "Health Savings Account" means a health savings account ("HSA") as defined by Code Section 223(d). An HSA is an individual trust or custodial account separately established and maintained outside the Plan by a Participant and a qualified trustee or custodian.

2.13 "Participant" means an Eligible Employee who has commenced and continues participation in the Plan as provided in Article 3.

2.14 "Plan" means this Portland Public Schools Cafeteria Plan, as amended from time to time.

2.15 "Plan Administrator" means such person or persons appointed by the District to control and manage the operation and administration of the Plan. In the absence of such an appointment, the District shall be the Plan Administrator.

2.16 "Plan Year" means, with respect to the health care reimbursement account program, dental and vision care reimbursement account program, and the dependent care reimbursement account program, the calendar year (January 1 through December 31). The initial Plan Year of the dental and vision care reimbursement account program shall be a short Plan Year of October 1, 2013, through December 31, 2013.

Notwithstanding the foregoing, with respect only to Eligible Employees whose Premium Payment Benefit's Plan Year is October 1 through September 30, the Plan Year for the health care reimbursement account program and dental and vision care reimbursement account program that begins January 1, 2014, shall be a short Plan Year of January 1, 2014, through September 30, 2014, and, beginning October 1, 2014, the Plan Year shall be October 1 through September 30.

With respect to the Premium Payment Benefit described in 4.1(a), the Plan Year means the plan year of the underlying group health plans. To the extent that the underlying group health plans have differing plan years, there shall be a separate Premium Payment Benefit for each group of group health plans that have the same plan year. The Plan Years for the Premium Payment Benefits are described in Exhibit A, which is attached hereto and incorporated by this reference herein. Exhibit A may be revised from time to time by the Plan Administrator without a formal amendment of this Plan document.

2.17 "Qualified Benefits Plan" means an employee benefit plan governing the provision of one or more benefits that are qualified benefits under Code Section 125(f). A plan does not fail to be a Qualified Benefits Plan merely because it includes a flexible spending arrangement (as defined in Code Section 106(c)(2)), provided that the flexible spending arrangement meets the requirements of Code Section 125 and the regulations thereunder.

2.18 "Similar Coverage" means coverage for the same category of benefits for the same individuals (e.g., family to family or single to single). For example, two plans that provide major medical coverage provide Similar Coverage. A health flexible spending arrangement is not Similar Coverage with respect to an accident or health plan that is not a health flexible spending arrangement. Coverage provided by another employer, such as a spouse's or Dependent's employer, may be treated as providing Similar Coverage if it satisfies the requirements of this section.

ARTICLE 3

ELIGIBILITY

3.1 Eligibility for Participation. An Eligible Employee shall be eligible to participate in this Plan on the first day of the calendar month after he or she has completed one full calendar month of employment.

3.2 Termination of Participation. In the event a Participant transfers to an ineligible class of employees or terminates employment with the District, the Participant's participation in this Plan shall cease as of the date of such transfer or termination, except as specifically provided for in this Plan.

3.3 Transfer from Ineligible to Eligible Class. In the event an ineligible employee transfers to the eligible class, he or she shall be eligible to participate in the Plan on the first day of the calendar month following the transfer if he or she is a former Participant or has previously satisfied the requirements of 3.1 and would have previously been eligible to participate if he or she had been in the eligible class.

3.4 Special Rules. Notwithstanding the provisions of 3.1, the following special rules apply.

(a) Eligibility for HSA. To be eligible to elect the Health Savings Account Benefit described in 4.1(e), an Eligible Employee must elect coverage under a District-provided high deductible health plan ("HDHP") option that satisfies Code Section 223(c)(2). An employee is not eligible to elect the Health Savings Account Benefit if he or she elects coverage under the Health Care Expense Reimbursement Benefit described in 4.1(b) or is covered under a general purpose, nonsuspended health reimbursement arrangement provided by the District outside the Plan. An Eligible Employee must also meet additional requirements as described in Article 12 to elect the Health Savings Account Benefit.

(b) Eligibility for Health Care Expense Reimbursement Benefit. An employee is not eligible to elect coverage under the Health Care Expense Reimbursement Benefit described in 4.1(b) if he or she elects coverage under a District-provided HDHP option, the Health Savings Account Benefit described in 4.1(e), or the Dental and Vision Care Expense Reimbursement Benefit described in 4.1(c).

(c) Eligibility for Dental and Vision Care Expense Reimbursement Benefit. An employee is not eligible to elect coverage under the Dental and Vision Care Expense Reimbursement Benefit described in 4.1(c) he or she elects coverage under the Health Care Expense Reimbursement Benefit described in 4.1(b).

ARTICLE 4

PARTICIPATION

4.1 Election to Participate. The participation election form shall be signed by the Eligible Employee, shall designate the benefits in which the Eligible Employee elects to participate, and shall designate the Plan Year (or the remaining portion of the Plan Year) as the time period for which participation will be effective. The election form shall also specify the amounts by which the employee's Compensation shall be reduced or the amount of such reduction shall be determinable from that form. A Participant's Compensation reduction election must satisfy the minimum and maximum elective contribution requirements in 5.3.

An election form filed by a Participant is subject to acceptance, modification, or rejection by the Plan Administrator. The Plan Administrator may modify or reject an election in order to satisfy the terms of this Plan or applicable legal requirements.

Subject to 3.4, an Eligible Employee may elect to receive one or more of the following benefits, all of which (except the cash benefit) shall be paid or reimbursed under this Plan by a Compensation reduction agreement with the employee:

(a) Premium Payment Benefit. This benefit consists of the Participant's share of the cost of the premiums under the District-provided group health plans to the extent that coverage under such plans is excludible from income under Code Section 106. The terms, conditions, and benefits of the various health plans are set forth in separate plan documents which are incorporated herein by this reference.

(b) Health Care Expense Reimbursement Benefit. This benefit consists of Health Care Expenses incurred by the Participant that are reimbursable under the health care reimbursement account program set forth in Article 9.

(c) Dental and Vision Care Expense Reimbursement Benefit. This benefit consists of Dental and Vision Care Expenses incurred by the Participant that are reimbursable under the dental and vision care reimbursement account program set forth in Article 10.

(d) Dependent Care Expense Reimbursement Benefit. This benefit consists of Dependent Care Expenses incurred by the Participant that are reimbursable under the dependent care assistance program set forth in Article 11.

(e) Health Savings Account Benefit. This benefit consists of pre-tax Compensation reduction contributions and District contributions as described in Article 12 to a qualifying HSA established and maintained outside the Plan.

(f) Cash Benefit. This benefit consists of taxable cash compensation payable in substantially equal amounts ratably over the Plan Year or over the portion of the Plan Year during which the Participant's Compensation is generally

paid when the Participant has elected to be compensated on a school year basis. An eligible Participant may elect to receive a portion of the District contribution (other than the District contribution to an HSA) as taxable cash compensation instead of electing coverage under a District-provided group health plan. The eligibility and other requirements for cashing out the District contribution are set forth in Exhibit B, which is attached hereto and incorporated by reference herein. Exhibit B may be revised from time to time by the Plan Administrator without a formal amendment of this Plan document.

4.2 Election Procedures. The following rules shall govern an Eligible Employee's elections under this Plan:

(a) Initial Participation. Except as otherwise provided in 4.3, if the Eligible Employee does not make the participation election before the employee is to begin participation under 3.1, the employee's election may be made only

during the annual open enrollment period and will be effective as of the first day of the Plan Year to which the open enrollment period applies.

(b) Continuation of Participation. A Participant shall make a new election for each Plan Year to continue participation in the Plan. A Participant's election shall be made during the annual open enrollment period chosen by the Plan Administrator, prior to the beginning of the Plan Year to which the election applies. The first day of that Plan Year shall be the effective date of the Participant's participation for that Plan Year.

(c) Eligible Expenses. Expenses eligible for reimbursement under a reimbursement benefit elected by the Participant shall be only the eligible expenses incurred by the Participant after the effective date of the employee's participation and during the Plan Year for which the election is made. Expenses incurred before or after the applicable Plan Year or the period of coverage shall not be reimbursable from amounts contributed by the District on behalf of the Participant during the applicable Plan Year.

(d) Additional Eligibility Requirements. The program and plan documents incorporated by reference into this Plan may have their own eligibility requirements for participation. The eligibility rules of this Plan are in addition to and do not override the eligibility rules of the benefit programs or plans that have been incorporated by reference herein.

4.3 Revocation and Changes. Once made, a Participant's election shall be effective for the entire Plan Year for which made and shall not be revoked or changed except as provided in this section. The reasons for which revocations or changes in elections provided in this section are permitted may be restricted pursuant to nondiscriminatory rules adopted by the Plan Administrator that are consistently applied. Except as provided below, benefit election changes must be made within 31 days after the event that entitles the Participant to make the election change. With respect to a benefit election change made under 4.3(c) on account of losing coverage under Medicaid or a state child health plan ("CHIP") or becoming eligible for a premium assistance subsidy under Medicaid or CHIP, the election change must be made within 60 days after the loss of coverage or the determination of eligibility, as applicable.

Notwithstanding the foregoing, an election to contribute to an HSA can be changed or revoked as provided in 4.3(h).

If any election change is conditioned upon an individual obtaining (or ceasing) coverage under another plan, the Plan Administrator may rely on a Participant's certification that the individual has or will obtain (or does not have or will cease) coverage under the other plan (unless the Plan Administrator has reason to believe that the certification is incorrect).

(a) Significant Cost or Coverage Changes. This 4.3(a) sets forth rules for election changes as a result of changes in cost or coverage. This 4.3(a) does not allow election changes with respect to the Health Care Expense

Reimbursement Benefit described in 4.1(b) or the Dental and Vision Care Expense Reimbursement Benefit described in 4.1(c).

(1) Cost Changes.

(A) Automatic Changes. If the cost of a Qualified Benefits Plan increases or decreases during a Plan Year and, under the terms of the plan, Participants are required to make a corresponding change in their payments, the Plan Administrator may, on a reasonable and consistent basis, automatically make a

prospective increase or decrease, as the case may be, in the affected Participants' Compensation reduction contributions for such plan.

(B) Significant Cost Changes. If the Plan Administrator determines that the cost charged to a Participant for a Benefit Package Option has significantly increased or decreased during a Plan Year, the Participant may make a corresponding change in election under the Plan. Changes that may be made include commencing participation in the Plan for the Benefit Package Option with a decrease in cost, or, in the case of an increase in cost, revoking an election for that coverage and, in lieu thereof, either receiving on a prospective basis coverage under another Benefit Package Option providing Similar Coverage or dropping coverage if no other Benefit Package Option providing Similar Coverage is available.

(C) Application of Cost Changes. For purposes of 4.3(a)(1)(A) and (B), a cost increase or decrease means an increase or decrease in the amount of the Compensation reduction contributions under the Plan, whether that increase or decrease results from an action taken by the Participant or the Employer.

(D) Application to Dependent Care. This 4.3(a)(1) applies in the case of a dependent care assistance plan only if the cost change is imposed by a dependent care provider who is not a relative of the Participant. For this purpose, a relative is an individual who is related as described in Code Sections 152(d)(2)(A) through (G), incorporating the rule of Code Section 152(f)(4).

(2) Coverage Changes.

(A) Significant Curtailment Without Loss of Coverage. If a Participant (or a spouse or Dependent) has a significant curtailment of coverage under a plan during the Plan Year that is not a loss of coverage as described in 4.3(a)(2)(B) (such as a significant increase in the deductible, the copay, or the out-of-pocket cost sharing limit under an accident or health plan), any Participant who had been participating in the plan and receiving that coverage may revoke his or her election for that coverage and, in lieu thereof, elect to receive on a prospective basis coverage under another Benefit Package Option providing Similar Coverage. Coverage under a plan is significantly curtailed only if there is an overall reduction in coverage provided under the plan so as to constitute reduced coverage generally.

(B) Significant Curtailment With Loss of Coverage. If a Participant (or a spouse or Dependent) has a significant curtailment that is a loss of coverage, that Participant may revoke his or her election under the Plan and, in lieu thereof, elect either to receive on a prospective basis coverage under another Benefit Package Option providing Similar Coverage or to drop coverage if no Benefit Package Option providing Similar Coverage is available. A loss of coverage means a complete loss of coverage under the Benefit Package Option or other coverage option (including the elimination of a Benefit Package Option, an HMO ceasing to be available in the area where the individual resides, or the individual losing all coverage under the option by reason of an overall lifetime or annual limitation). The Plan Administrator may, in its discretion (which may be exercised on a case-by-case basis provided that the exercise of discretion does not discriminate in favor of highly compensated Participants), treat the following as a loss of coverage:

(i) A substantial decrease in the medical care providers available under the option (such as a major hospital ceasing to be a member of a preferred provider network or a substantial decrease in the physicians participating in a preferred provider network or an HMO);

(ii) A reduction in the benefits for a specific type of medical condition or treatment with respect to which the Participant, spouse, or Dependent is currently in a course of treatment; or

(iii) Any other similar fundamental loss of coverage.

(C) Addition or Improvement of a Benefit Package Option. If a plan adds a new Benefit Package Option or other coverage option, or if coverage under an existing Benefit Package Option or other coverage option is significantly improved during a Plan Year, eligible Participants (whether or not they have previously made an election under the Plan or have previously elected the Benefit Package Option) may revoke their election under the Plan and, in lieu thereof, make an election on a prospective basis for coverage under the new or improved Benefit Package Option.

(3) Change in Coverage Under Another Employer Plan. A Participant may make a prospective election change that is on account of and

corresponds with a change made under another employer plan (including a plan of the Employer or of another employer) if:

(A) The other cafeteria plan or Qualified Benefits Plan permits participants to make an election change that would be permitted under paragraphs (b) through (g) of Treasury Regulation Section 1.125-4 (disregarding Treasury Regulation Section 1.125-4(f)(4)); or

(B) The Plan permits Participants to make an election for a Plan Year that is different from the plan year under the other cafeteria plan or Qualified Benefits Plan.

(4) Loss of Coverage Under Other Group Health Coverage. A Participant may make an election on a prospective basis to add coverage under the Plan for the Participant, spouse, or Dependent if the Participant, spouse, or Dependent loses coverage under any group health coverage sponsored by a governmental or educational institution, including the following:

(A) A state's children's health insurance program under Title XXI of the Social Security Act;

(B) A medical care program of an Indian Tribal government, the Indian Health Service, or a tribal organization;

(C) A state health benefits risk pool; or

(D) A foreign government group health plan.

(b) Change in Status. A Participant may revoke an election during a Plan Year and make a new election for the remaining portion of the Plan Year if both (1) and (2) below are satisfied.

(1) One of the following change-in-status events occurs:

(A) Legal Marital Status. An event that changes a Participant's legal marital status, including marriage, death of spouse, divorce, legal separation, and annulment.

(B) Number of Dependents. An event that changes a Participant's number of Dependents, including birth, death, adoption, and placement for adoption (as defined in regulations under Code Section 9801).

(C) Employment Status. Any of the following events that change the employment status of the Participant, the Participant's spouse, or the Participant's Dependent: a termination or commencement of employment; a strike or lockout; a

commencement of or return from an unpaid leave of absence; and a change in worksite. In addition, if the eligibility conditions of the cafeteria plan or other employee benefit plan of the employer of the Participant, spouse, or Dependent depend on the employment status of that individual and there is a change in that individual's employment status with the consequence that the individual becomes (or ceases to be) eligible under the plan, then that change constitutes a change in employment under this 4.3(b)(1)(C). If a Participant terminates employment and cancels coverage during the period of unemployment, and resumes employment within 30 days (without any other intervening event that would permit a change in election), the Participant's prior election for the Plan Year is automatically reinstated. If a Participant terminates employment and cancels coverage during the period of unemployment, and resumes employment more than 30 days following termination, the Participant may return to the election in effect prior to termination of employment or make a new election under the Plan.

(D) Dependent Satisfies or Ceases to Satisfy Eligibility Requirements. An event that causes a Participant's Dependent to satisfy or cease to satisfy the eligibility requirements for coverage due to attainment of age, student status, or any similar circumstance.

(E) Residence. A change in the place of residence of the Participant, spouse, or Dependent.

(F) Nondependent Children. A change-in-status event described above that affects a Participant's child who is under age 27 and not a Dependent, including becoming newly eligible for coverage or eligible for coverage beyond the date on which the child otherwise would have lost coverage.

This subsection (F) shall be effective on the first day of the first Plan Year beginning after March 30, 2010.

(2) The election change satisfies the following consistency rules:

(A) An election change satisfies the requirements of this 4.3(b)(2) if the election change is on account of and corresponds with a change in status that affects eligibility for coverage under an employer's plan. A change in status that affects eligibility under an employer's plan includes a change in status that results in an increase or decrease in the number of a Participant's family

members or Dependents who may benefit from coverage under the plan. An election change also satisfies the requirements of this 4.3(b)(2) if the election change is on account of and corresponds with a change in status that affects expenses described in Code Section 129 (including employment-related expenses as defined in Code Section 21(b)(2)) with respect to dependent care assistance.

(B) If the change in status is the Participant's divorce, annulment, or legal separation from a spouse, the death of a spouse or Dependent, or a Dependent ceasing to satisfy the eligibility requirements for coverage, a Participant's election under the Plan

to cancel accident or health insurance coverage for any individual other than the spouse involved in the divorce, annulment, or legal separation, the deceased spouse or Dependent, or the Dependent that ceased to satisfy the eligibility requirements for coverage, respectively, fails to correspond with that change in status. In addition, if a Participant, spouse, or Dependent gains eligibility for coverage under a Family Member Plan as a result of a change in marital status under 4.3(b)(1)(A) or a change in employment status under 4.3(b)(1)(C), a Participant's election under the Plan to cease or decrease coverage for that individual under the Plan corresponds with that change in status only if coverage for that individual becomes applicable or is increased under the Family Member Plan.

(c) Special Enrollment Rights. To the extent that the group health plan benefits described in 4.1 are subject to the special enrollment rules provided in Section 2701(f) of the Public Health Service Act, a Participant who is entitled to special enrollment rights may revoke his or her election with respect to coverage under such group health plan during a Plan Year and make a new election that corresponds with the special enrollment rules.

(d) Judgment, Decree, or Order. The Plan Administrator may change a Participant's election to provide group health plan coverage for the Participant's child (or for a foster child who is a Dependent of the Participant) if a judgment, decree, or order resulting from a divorce, legal separation, annulment, or change in legal custody requires accident or health coverage for the child under the Participant's plan. A Participant may change his or her election to cancel group health plan coverage for the child if such an order requires the spouse, former spouse, or other individual to provide coverage for the child, and that coverage is, in fact, provided.

(e) Entitlement to Medicare or Medicaid. A Participant may prospectively cancel or reduce the Participant's, spouse's, or Dependent's coverage under an accident or health plan if the Participant, spouse, or Dependent becomes entitled to coverage (i.e., becomes enrolled) under Part A or Part B of Title XVIII of the Social Security Act (Medicare) or Title XIX of the Social Security Act (Medicaid), other than coverage consisting solely of benefits under Section 1928 of the Social Security Act (the program for distribution of pediatric vaccines). In addition, if a Participant, spouse, or Dependent who has been entitled to such coverage under Medicare or Medicaid loses eligibility for such coverage, the Participant may make a prospective election to commence or increase the Participant's, spouse's, or Dependent's coverage under the accident or health plan.

(f) Family and Medical Leave Act. A Participant taking leave under the Family and Medical Leave Act ("FMLA") may revoke an existing election of accident or health plan coverage and make such other election for the remaining portion of the Plan Year as may be provided for under the FMLA.

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

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

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

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

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

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

(2) Enrollment in a Qualified Health Plan Through an Exchange. An election change may be made due to enrollment in a qualified health plan if both (A) and (B) are satisfied.

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

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

ARTICLE 5

CREDITS AND REIMBURSEMENT PROCEDURES

5.1 Credits to Plan. The following rules shall govern the Compensation reduction credits to this Plan during a Plan Year:

(a) Establishment of Accounts. For each Participant, the Plan Administrator shall establish a separate Account for each reimbursement benefit under 4.1 for the Plan Year.

(b) Compensation Reduction Credits. For each Participant, the amount by which the Participant elects to reduce his or her Compensation for a specific benefit shall be deducted from the Participant's Compensation during the Plan Year by payroll deduction and credited to the Participant's Account for such benefit, credited against the cost of that benefit as determined by the Plan Administrator, or, for HSA contributions, deposited with the HSA trustee/custodian maintaining the Participant's HSA.

(c) District Contributions. Prior to the beginning of each Plan Year, the District shall determine the amount to be credited to each Participant for the purchase of benefits described in 4.1. The amount so established for each Plan Year shall be set forth in Exhibit C, to be attached hereto and incorporated by reference herein. The Plan Administrator may change the District contribution amount set forth in Exhibit C without amending this Plan. District contributions or credits may be made in substantially ratable installments throughout the Plan Year.

(d) Records of Contributions. The Plan Administrator shall maintain appropriate records and shall record the amounts credited for a Participant for a specified benefit under (b) and (c) above in the Participant's Account established for such benefit.

(e) Allocation of Expense. An eligible Dependent Care Expense submitted for reimbursement by a Participant shall be paid only from the Account established for such Participant for such expense and only to the extent of the amount recorded in the Account (after deducting earlier reimbursements made during the Plan Year). The maximum amount of Health Care Expense reimbursement under Article 9 or Dental and Vision Care Expense reimbursement under Article 10 must be available at all times during the Plan Year (properly reduced as of any particular time for prior reimbursements for the same Plan Year). Thus, the maximum amount of Health Care Expense or Dental and Vision Care Expense reimbursements at any particular time during the Plan Year cannot be limited to the amount recorded in the applicable Account at that time. Reimbursement will be deemed to be available at all times if it is paid at least monthly or when the total amount of the claims to be submitted is at least a specified, reasonable minimum amount (e.g. $50).

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

(d) Procedures. A Participant must make a written request to the Plan Administrator to receive a qualified reservist distribution. The Plan Administrator must receive a copy of the order or call to active duty before a distribution can be made. Only one qualified reservist distribution is permitted with respect to a Participant during a Plan Year. A Participant may submit requests for reimbursement for medical expenses incurred before the date of the request for a qualified reservist distribution and such reimbursements will be paid in accordance with Article 5 (taking into account the amount of the qualified reservist distribution as a reimbursement). A Participant may not submit requests for reimbursement for medical expenses incurred on or after the date of the request for distribution.

(e) Timing of Requests and Distributions. A request for a qualified reservist distribution must be made on or after the date of the order or call to active duty and before the last day of the Plan Year during which the order or call to active duty occurred. The health care reimbursement account program or dental and vision care reimbursement account program, as applicable, shall pay the qualified reservist distribution to the Participant within a reasonable time, but not more than 60 days after the date of the request for a distribution. A qualified reservist distribution may not be made with respect to a Plan Year ending before the order or call to active duty.

ARTICLE 6

CLAIMS PROCEDURE

6.1 Initial Claim. Any person claiming a premium payment benefit under this Plan shall present the claim in writing to the Plan Administrator. Any person claiming a Dependent Care Expense Reimbursement Benefit, a Health Care Expense Reimbursement Benefit, or a Dental and Vision Care Expense Reimbursement Benefit under this Plan shall present the claim in writing to the entity that administers those benefits ("Claim Reviewer"). For purposes of this article, the person claiming a benefit (or his or her authorized representative) shall be referred to as the "Claimant."

6.2 Decision on Initial Claim.

(a) Time Period for Denial Notice. A decision shall be made on the claim as soon as practicable and shall be communicated in writing by the Plan Administrator or Claim Reviewer to the Claimant within a reasonable period after receipt of the claim by the Plan Administrator or Claim Reviewer.

(b) Contents of Notice. If the claim is wholly or partially denied, the notice of denial shall indicate:

(1) The specific reasons for the denial;

(2) The specific references to pertinent Plan provisions on which the denial is based;

(3) A description of additional material or information necessary for the Claimant to perfect the claim and an explanation of why such material or information is necessary; and

(4) An explanation of the Plan's claim review procedure.

6.3 Review of Denied Claim. If a Claimant receives a notice of denial, the Claimant may request a review of the claim. The request for review is made by personally delivering or mailing a written request for review, prepared by either the Claimant or his or her authorized representative, to the Plan Administrator. The Claimant's request for review must be made within 60 days after receipt of the notice of denial. If the written request for review is not made on a timely basis, the Claimant shall be deemed to waive his or her right to review. The Claimant or his or her duly authorized representative may, at or after the time of making the request, review all pertinent documents and submit issues and comments in writing.

If a Claimant requests a review of a claim under the health care reimbursement account program, only the employee described in 9.7(b)(3) may review denied claims. Such employee shall act on behalf of the Plan Administrator in reviewing and deciding denied claims.

6.4 Decision on Review. A review shall be made by the Plan Administrator after receipt of a timely filed request for review. A decision on review shall be made and furnished in writing to the Claimant. The decision shall be made within a reasonable period of

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

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

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

ARTICLE 7

PLAN ADMINISTRATION

7.1 Appointment of Plan Administrator. The District shall appoint one or more persons to act as the Plan Administrator and to serve for such terms as the District may designate or until a successor has been appointed or until removed by the District. Vacancies due to resignation, death, removal or other causes shall be filled by the District. The Plan Administrator shall be bonded except as may otherwise be allowed by law. The Plan Administrator may be paid reasonable compensation for its service; however, a Plan Administrator who is a full-time employee of the District shall serve without compensation. All reasonable expenses of the Plan Administrator shall be paid by the District. If a designation of a Plan Administrator is not made, the District shall be the Plan Administrator.

7.2 Rights and Duties. The Plan Administrator shall be the named fiduciary of the Plan. The Plan Administrator, on behalf of the Participants and their beneficiaries, shall have the authority to control and manage the operation and administration of the Plan and shall have all powers necessary to accomplish those purposes. The responsibility and authority of the Plan Administrator shall include, but shall not be limited to, the following:

(a) Determining all questions relating to the eligibility of employees to participate;

(b) Computing and certifying the amount and kind of benefits payable to Participants, spouses, and dependents;

(c) Authorizing all disbursements;

(d) Maintaining all necessary records for the administration of the Plan other than those that the District has specifically agreed to maintain;

(e) Interpreting the provisions of the Plan and publishing such rules for the regulation of the Plan as are deemed necessary and not inconsistent with the terms of the Plan; and

(f) Directing the District to make payments to Participants, former Participants, spouses, and dependents in accordance with the provisions of the Plan.

7.3 Information, Reporting, and Disclosure. To enable the Plan Administrator to perform its functions, the District shall supply full and timely information to the Plan Administrator on all matters relating to the Participants and such other pertinent facts as the Plan Administrator may require. The Plan Administrator shall have the responsibility of complying with the reporting and disclosure requirements of applicable law.

7.4 Independent Qualified Accountant. If required by applicable law or regulation, the Plan Administrator shall engage, on behalf of all Plan Participants, an

independent qualified public accountant who shall conduct such examinations of the financial statements of the Plan and of other books and records of the Plan as the accountant may deem necessary to enable the accountant to form an opinion as to whether the financial statements and schedules required by law to be included in any reports are presented fairly and in conformity with generally accepted accounting principles.

7.5 Allocation and Delegation of Responsibility. The Plan Administrator may allocate fiduciary responsibilities to one or more persons and may delegate to such persons the authority to carry out fiduciary responsibilities under the Plan.

The Plan Administrator, in making the above allocation of fiduciary responsibilities, may provide that a person or group of persons may serve, with respect to the Plan, in more than one fiduciary capacity.

The Plan Administrator or persons to whom fiduciary responsibilities have been delegated by the Plan Administrator may employ one or more persons to render advice with regard to any responsibility such fiduciary has under the Plan.

In the event a fiduciary responsibility is allocated to a person, no other person shall be liable for any act or omission of the person to whom the responsibility is allocated except as may be otherwise required by law. If a fiduciary responsibility is delegated to a person other than the Plan Administrator, the Plan Administrator shall not be responsible or liable for an act or omission of such person in carrying out such responsibility except as may otherwise be required by law.

7.6 Indemnification. The District hereby indemnifies and holds harmless the Plan Administrator and each person to whom a fiduciary responsibility is allocated from any loss, claim, or suit arising out of the performance of obligations imposed hereunder and not arising from the Plan Administrator's or the person's willful neglect, misconduct, or gross negligence.

ARTICLE 8

MISCELLANEOUS

8.1 Right to Amend and Terminate. The District represents that the Plan is intended to be a continuing program for Participants but reserves the right to terminate the Plan at any time. The District may modify, alter, or amend this Plan in whole or in part.

8.2 Unsecured Right to Payment. No employee shall by virtue of this Plan have any interest in any specific asset or assets of the District. An employee has only an unsecured contract right to receive benefits in accordance with the provisions of the Plan.

8.3 No Obligation to Fund. The District shall have no obligation to establish a trust or fund for the payment of benefits or to insure any of the benefits.

8.4 No Interest. The District shall have no obligation to pay interest on any Participant's salary reduction amounts or Accounts used to provide the benefits under this Plan.

8.5 Provision Against Anticipation. No Participant shall have the right or power to alienate, anticipate, commute, pledge, encumber, or assign any of the benefits or proceeds recorded for the Participant under the terms of this Plan, and no such benefits or proceeds shall be subject to seizure by any creditor of the Participant under any writ or proceedings at law or in equity.

8.6 Right to Discharge Employees. Neither the establishment of this Plan, nor any modification thereof, nor the payment of any benefit, shall be construed as giving any Participant or any other person any legal or equitable right against the District unless the same shall be specifically provided for in this Plan, nor as giving any employee or Participant the right to be retained in the District's employ. All employees shall remain subject to discharge by the District to the same extent as if this Plan had never been adopted.

8.7 Construction. This Plan shall be construed in accordance with applicable federal law and regulations issued thereunder and, to the extent applicable, the laws of the state of Oregon.

8.8 Legally Enforceable. The District intends that the Plan terms, including those relating to coverage and benefits, are legally enforceable. The Plan is maintained for the exclusive benefit of employees.

ARTICLE 9

HEALTH CARE REIMBURSEMENT ACCOUNT PROGRAM

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

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

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

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

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

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

9.4 Administration. The plan administrator of this health care reimbursement account program shall be the same as for the Portland Public Schools Cafeteria Plan. The procedures for making and reviewing claims, plan administration, elections and revocation of elections, and reimbursement requests and payments, shall be as set forth in the Portland Public Schools Cafeteria Plan.

9.5 Continuation Coverage. To the extent that this health care reimbursement account program is a group health plan, it is subject to the continuation coverage requirements under the Consolidated Omnibus Budget Reconciliation Act of 1985, as amended ("COBRA"), as presently set forth in Sections 2201 through 2208 of the Public Health Service Act. Accordingly, this program shall be construed in accordance with COBRA and the applicable regulations thereunder.

9.6 Military Service.

(a) General. The health care reimbursement account program shall comply with the Uniformed Services Employment and Reemployment Rights Act of 1994 ("USERRA"). The USERRA provisions contained in 38 USC Section 4301 et seq are incorporated by reference.

(b) Qualifying Reemployment. If a Participant is absent from employment due to service in the uniformed services as defined in 38 USC Section 4301(13) ('military service"), the Participant is entitled to reemployment rights and benefits if the following conditions are satisfied ("qualifying reemployment"):

(1) The Participant, or an appropriate officer of the uniformed service, must provide advance written or oral notice of the military service to the District. Notice is not required if it is precluded by military necessity or is otherwise impossible or unreasonable as described in 20 CFR Section 1002.86.

(2) The Participant's military absence from the District must be for a cumulative period of less than five years. The Participant may be absent from employment for more than five years if the longer period of time is necessary to complete an initial period of obligated service or a Participant is ordered to or retained on active duty as described in 38 USC Section 4312(c) and 20 CFR Section 1002.103.

(3) The Participant must report to, or apply for reemployment with, the District within a certain number of days after the completion of military service. The period in which to report to the District or apply for reemployment is determined by reference to the period of military service as follows:

(A) If the period of military service is less than 31 days, or if the absence from employment is for the purposes of an examination to determine the Participant's fitness for military service, the Participant must report to the District not later than the first work day following completion of the military service and the expiration of eight hours after a period allowing for safe transportation to the Participant's residence.

(B) If the period of military service is for more than 30 days but less than 181 days, the Participant must submit an application for reemployment (written or oral) not later than 14 days after completion of the military service.

(C) If the period of military service is for more than 180 days, the Participant must submit an application for reemployment (written or oral) not later than 90 days after completion of military service.

(D) If the Participant is hospitalized for, or convalescing from, an illness or injury incurred in, or aggravated during, military service, the Participant shall report to the District or submit an application for reemployment at the end of the recovery period. The recovery period may not exceed two years.

The foregoing periods may be extended pursuant to 38 USC Section 4312(e) and 20 CFR Sections 1002.115-1002.117 if reporting to the District or applying for reemployment is impossible or unreasonable through no fault of the Participant.

(4) The Participant did not receive a type of discharge or separation from service described in 38 USC Section 4304 and 20 CFR Section 1002.135.

(5) If the military service exceeds 30 days, the Participant must provide, upon the District's request, documentation to establish that the requirements of 9.6(b)(2), (3), and (4) above are satisfied. This 9.6(b)(5) shall not apply if such documentation does not exist or is not readily available.

(c) Continuation of Coverage.

(1) Election of Continuation Coverage. If a Participant is absent from employment due to military service, the Participant may elect to continue the Participant's and any Dependent's coverage.

This paragraph shall be effective January 18, 2006. Coverage shall terminate on the date described in 3.2 and shall be retroactively reinstated if the Participant elects to continue coverage and pays all premiums due within the periods described below. To the extent consistent with USERRA, an election to continue coverage must be made in the same manner and time periods applicable to an election of COBRA coverage. Notwithstanding the foregoing, if the Participant does not provide advance notice of the military service because it is precluded by military necessity or is otherwise impossible or unreasonable, the election of USERRA continuation coverage must be made within 60 days after the date it becomes possible and reasonable to make the election or, if later, by the end of the COBRA election period. Notwithstanding the foregoing, if the Participant leaves employment without giving advance notice of the military service (which is not excused as described above), the Participant shall have no right to elect USERRA continuation coverage.

(2) Duration of Continuation Coverage. The maximum period of coverage shall be the lesser of:

(A) The 24-month period (18-month period with respect to elections made before December 10, 2004) beginning on the date on which the Participant's absence begins; or

(B) The period beginning on the date on which the Participant's absence begins and ending on the day after the date on which the Participant fails to report or apply for reemployment as described in 9.6(b)(3).

(3) Premiums. A Participant who elects to continue coverage may be required to pay not more than 102 percent of the full premium, except that a Participant who performs military service for less than 31 days may not be required to pay more than the employee share for the coverage.

This paragraph shall be effective January 18, 2006. To the extent consistent with USERRA, premiums are due on the due dates applicable to premiums for COBRA coverage. Notwithstanding the foregoing, if it is precluded by military necessity or is otherwise impossible or unreasonable for a Participant to pay a premium by the due date, such Participant must pay the premium within 30 days after the date it becomes possible and reasonable for him or her to do so.

(4) Termination of Continuation Coverage. This paragraph shall be effective January 18, 2006. To the extent consistent with USERRA, USERRA continuation coverage shall be terminated if premiums are not paid by the due date described in 9.6(c)(3) or if a Participant receives a type of discharge or separation from service described in 38 USC Section 4304 and 20 CFR Section 1002.135.

(d) Reinstatement of Coverage. If a Participant's or Dependent's coverage terminates due to the Participant's military service, the coverage shall be reinstated upon qualifying reemployment. An exclusion or waiting period shall not be imposed on the Participant or any Dependents in connection with the reinstatement of coverage upon qualifying reemployment if an exclusion or waiting period would not have been imposed had the coverage not been terminated due to military service. The preceding sentence shall not apply to the coverage of any illness or injury determined by the Secretary of Veterans Affairs or his or her representative to have been incurred in, or aggravated during, military service.

9.7 Protected Health Information.

(a) Hybrid Entity. The Plan is a hybrid entity within the meaning of 45 CFR Section 164.103. The health care reimbursement account program is the health care component of the Plan. As provided in 45 CFR Section 164.105(a), the privacy rules under the Health Insurance Portability and Accountability Act of 1996 ("HIPAA") apply only to the health care component of the Plan. The health care component shall not disclose protected health information, as defined in 45 CFR Section 164.103 ("PHI") to a non-health care component of the Plan in circumstances in which the HIPAA privacy rules would prohibit such disclosure if the health care component and the other component were separate legal entities.

(b) Disclosure of Protected Health Information to the District.

(1) Permitted and Required Uses and Disclosures of Protected Health Information.

(A) Plan Administration Functions. Subject to the conditions of disclosure described in 9.7(b)(2), (3), and (4), the health care reimbursement account program, or the program's business associate, may disclose PHI to the District for plan administration functions. Plan administration functions means administration functions performed by the District on behalf of the program, such as quality assurance, claims processing, auditing, and monitoring. Plan administration functions are limited to activities that would meet the definition of payment or health care operations, as defined in 45 CFR Section 164.501, but do not include functions to modify, amend, or terminate the program or solicit bids from prospective issuers. Plan administration functions do not include any employment-related functions or functions in connection with any other benefits or benefit plans. These permitted and required uses and disclosures may not be inconsistent with 45 CFR Part 164, Subparts C and E.

(B) Enrollment and Disenrollment Information. The program, or the program's business associate, may disclose to the District information on whether the individual is participating in the program. Such disclosure is not subject to 9.7(b)(2), (3), and (4).

(C) Summary Health Information. The program, or the program's business associate, may disclose summary health information, as defined in 45 CFR Section 164.504(a), to the District, provided the District requests the summary health information for the purpose of modifying, amending, or terminating the program and the disclosure does not violate 45 CFR Section 164.502(9)(5)(i). Such disclosure is not subject to 9.7(b)(2), (3), and (4).

(2) Conditions of Disclosure for Plan Administration Functions. Disclosure of PHI to the District under 9.7(b)(1)(A) is permitted only upon receipt of a certification from the District that the Plan has been amended and the District has agreed to the following conditions regarding the use and disclosure of PHI. The District will:

(A) Not use or further disclose PHI other than as permitted or required by the program or as required by law;

(B) Ensure that any subcontractors or agents to whom the District provides PHI received from the program agree to the

same restrictions and conditions that apply to the District with respect to such information;

(C) Not use or disclose PHI for employment-related actions and decisions or in connection with any other benefit or employee benefit plan of the District;

(D) Report to the program any use or disclosure of PHI that is inconsistent with the uses and disclosures provided for in the program or under HIPAA, of which it becomes aware;

(E) Make available PHI to comply with HIPAA's right to access in accordance with 45 CFR Section 164.524;

(F) Make available PHI for amendment and incorporate any amendments to PHI in accordance with 45 CFR Section 164.526;

(G) Make available the information required to provide an accounting of disclosures in accordance with 45 CFR Section 164.528;

(H) Make its internal practices, books, and records relating to the use and disclosure of PHI received from the program available to the Secretary of the Department of Health and Human Services ("DHHS"), or any other officer or employee of DHHS to whom such authority has been delegated, for purposes of determining compliance by the program with 45 CFR, Part 164, Subpart E;

(I) If feasible, return or destroy all PHI received from the program that the District still maintains in any form and retain no copies of such information when no longer needed for the purpose for which disclosure was made, except that, if such return or destruction is not feasible, limit further uses and disclosures to those purposes that make the return or destruction of the information infeasible; and

(J) Ensure that adequate separation between the program and the District, as required in 45 CFR Section 164.504(f)(2)(iii), has been established.

(3) Adequate Separation Between the Program and the District. The District's Benefits Manager will have access to PHI under 9.7(b)(1)(A). The Benefits Manager shall only have access to and use of PHI to the extent necessary to perform the plan administration functions that the District performs for the program.

In the event that the Benefits Manager uses or discloses PHI in a way prohibited by the program or HIPAA, the District shall impose sanctions to ensure

that no further non-compliance occurs. Such sanctions may include an oral warning, a written warning, time off without pay, or termination of employment. The District shall determine the appropriate sanction based on the severity of the violation.

(4) Conditions of Disclosure of Electronic Protected Health Information. The provisions of this 9.7(b)(4) shall be effective April 20, 2006. Disclosure of electronic PHI, as defined in 45 CFR Section 160.103, to the District under 9.7(b)(1)(A) is permitted if the following rules are satisfied. The District will reasonably and appropriately safeguard electronic PHI created, received, maintained, or transmitted to or by the District on behalf of the program. The District will:

(A) Implement administrative, physical, and technical safeguards that reasonably and appropriately protect the confidentiality, integrity, and availability of the electronic PHI that it creates, receives, maintains, or transmits on behalf of the program;

(B) Ensure that any agent, including a subcontractor, to whom it provides such electronic PHI agrees to implement reasonable and appropriate security measures to protect the information;

(C) Ensure that the adequate separation required by 45 CFR Section 164.504(f)(2)(iii) and 9.7(b)(3) is supported by reasonable and appropriate security measures; and

(D) Report to the program any security incident of which it becomes aware.

9.8 Rescissions. This health care reimbursement account program will not rescind an individual's coverage under the program unless the individual (or a person seeking coverage on his or her behalf) performs an act, practice, or omission that constitutes fraud or makes an intentional misrepresentation of material fact, both of which are prohibited by the program. A rescission is as defined in 45 CFR § 147.128 or subsequent guidance. To the extent consistent with such guidance, a rescission is a cancellation or discontinuance of coverage that has retroactive effect (other than one due to a failure to timely pay required contributions). The program must provide at least 30 days advance written notice to each affected individual before coverage may be rescinded.

A Participant is prohibited from submitting for reimbursement an expense incurred by an individual other than the individuals described in 2.11. By submitting an expense for reimbursement, the Participant is making a representation that the expense is a Health Care Expense under 2.11. Whether an expense was incurred by an individual described in 2.11 is a material fact. The coverage of an individual who is not described in 2.11 may be rescinded if the requirements of this section are satisfied.

9.9 Mandatory Conversion of Account. The health care reimbursement Account of an Eligible Employee who is a Participant in this health care reimbursement account program immediately prior to October 1, 2013, and elects the Health Savings Account Benefit under 4.1(e) effective October 1, 2013, shall be converted, on a mandatory basis, to a dental and vision care reimbursement Account for the period of October 1, 2013, through December 31, 2013.

ARTICLE 10

DENTAL AND VISION CARE REIMBURSEMENT ACCOUNT PROGRAM

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

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

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

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

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

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

10.4 Other Provisions. The provisions contained in 9.4 through 9.7 apply to this dental and vision care reimbursement account program and are hereby incorporated by reference into this Article 10.

ARTICLE 11

DEPENDENT CARE REIMBURSEMENT ACCOUNT PROGRAM

11.1 Separate Program. This article is intended to qualify as a separate written dependent care assistance program within the meaning of Code Section 129. It is intended that reimbursements under this program be eligible for exclusion from the gross income of Participants under Code Section 129(a). Accordingly, this program shall be interpreted and construed in accordance with Code Section 129 and any regulations or other interpretations thereunder. To the extent that the requirements for such exclusion change under applicable federal law, the limitations and other rules set forth in this article shall automatically change to be consistent with such law.

This program represents one benefit that may be elected by Participants under the Portland Public Schools Cafeteria Plan, and a Participant under that Plan who elects the Dependent Care Reimbursement Benefit thereunder is deemed to be a Participant under this dependent care reimbursement account program, provided the Participant has one or more qualifying individuals at the time an election is permitted under the Portland Public Schools Cafeteria Plan. A "qualifying individual" means (a) a dependent of the Participant (as defined in Code Section 152(a)(1)) who is under age 13, or (b) a dependent (as defined in Code Section 21(b)(1)(B)) or the spouse of the Participant, if the dependent or spouse is physically or mentally incapable of self-care and has the same principal place of abode as the Participant for more than one-half of the taxable year. An individual shall not be treated as having the same principal place of abode as the Participant if at any time during the taxable year the relationship between the individual and the Participant is in violation of local law.

11.2 Nondiscrimination Requirements. The contributions and benefits provided under this program shall not discriminate in favor of highly compensated employees (as defined in Code Section 414(q)) or their dependents. The average benefits provided under all dependent care assistance programs of the District to nonhighly compensated employees must be at least 55 percent of the average benefits provided to highly compensated employees under all such programs.

11.3 Limitations. The amount of coverage that may be elected under this dependent care reimbursement account program for a Plan Year is limited to $5,000 (the limit is $2,500 for a married Participant who files a separate federal income tax return for the Plan Year); provided, however, that the coverage for an unmarried Participant shall not exceed the Participant's earned income for the Plan Year, and the coverage for a married Participant shall not exceed the lesser of the Participant's earned income or the spouse's earned income for the Plan Year. "Earned income" means wages, salaries, tips, and other employee compensation, but only if such amounts are includible in gross income for the taxable year, plus the amount of net earnings from self-employment for the taxable year. Earned income shall be computed without regard to any community property laws. Amounts received from pensions and annuities are not included. Amounts to which Code Section 871(a) applies are not included. Earned income shall not include any amounts paid or incurred by any employer for the Participant under this or any other dependent care assistance program. The earned income of a Participant's spouse for any month during which the spouse is a full-time student at an educational institution described in

Code Section 170(b)(1)(A)(ii) or is physically or mentally incapable of self-care shall be deemed to be not less than $250 (if the Participant has one qualifying individual for the Plan Year), or $500 (if the Participant has two or more qualifying individuals for the Plan Year). A full-time student is an individual who is enrolled at and attends the educational institution during each of five calendar months of the individual's taxable year for the number of course hours that is considered to be a full-time course of study. The enrollment for five calendar months need not be consecutive. School attendance exclusively at night does not constitute a full-time course of study. However, a full-time course of study may include some attendance at night.

11.4 Dependent Care Expenses. Dependent Care Expenses mean expenses for household services and expenses for the care of a qualifying individual, but only if the expenses are incurred to enable the Participant to be employed by the District for a period during which the Participant has a qualifying individual. Expenses for services outside the Participant's household will qualify only if the expenses are for the care of a dependent (as defined in Code Section 152(a)(1)) who is under age 13, or for the care of a qualifying individual who regularly spends at least eight hours each day in the Participant's household. If the outside services are provided by a dependent care center as defined in Code Section 21(b)(2)(D), the expense will qualify only if the dependent care center complies with all applicable laws and regulations of the applicable state or unit of local government. Dependent Care Expenses do not include expenses for services performed by an individual for whom a personal income tax exemption is allowable either to the Participant or the spouse, or expenses for services of a son, stepson, daughter, stepdaughter, or eligible foster child (as defined in Code Section 152(f)(1)(C)) of the Participant who has not attained age 19 at the close of the taxable year. For purposes of the preceding sentence, a Participant's child shall include a Participant's legally adopted child and a child placed with the Participant for adoption.

11.5 Administration. The plan administrator of this dependent care reimbursement account program shall be the same as for the Portland Public Schools Cafeteria Plan. The procedures for making and reviewing claims, plan administration, elections and revocation of elections, and reimbursement requests and payments shall be as set forth in the Portland Public Schools Cafeteria Plan.

ARTICLE 12

HEALTH SAVINGS ACCOUNT

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

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

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

(a) The prorated amount described in the preceding sentence; or

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

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

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

The HSA is not an employer-sponsored employee benefit plan. It is a savings account that is established and maintained by an HSA trustee or custodian outside this Plan to be used primarily for reimbursement of "qualified medical expenses" as set forth in Code Section 223(d)(2). The District has no authority or control over the Participant's use of the amounts contributed to the HSA, the investment or distribution of such amounts, or any other aspect of the HSA's administration. The District's sole duty is to forward the District contributions and Compensation reduction amounts elected by the Participant to the HSA custodian or trustee. Even though this Plan allows pre-tax Compensation reduction contributions to an HSA, the HSA is not intended to be a benefit plan sponsored or maintained by the District.

The District has caused this amended and restated Plan to be executed by its duly authorized representative as of the date set forth below.

SCHOOL DISTRICT NO. 1,
MULTNOMAH COUNTY, OREGON

By: _____

Date: _____

EXHIBIT A
PORTLAND PUBLIC SCHOOLS
CAFETERIA PLAN

Plan Years
(Referent Section 2.16)

The Plan Years of the separate premium payment benefits are as follows:

FEBRUARY 1 – JANUARY 31 PLAN YEAR

ATU/DCU/PFTCE

Full-Time and Part-Time Option 1 Employees:

- Kaiser
- Providence Personal Option Plan
- Providence Point of Service
- Trust Dental Plan
- Providence Vision
- Kaiser Vision
- VSP Vision
- Walgreens Prescription Mail Service
- Postal Prescriptions Mail Service
- Wellpartners Prescription Mail Service
- Providence Pharmacy Plan
- Kaiser Mail Service Pharmacy
- Caremark Mail Service Pharmacy
- Caremark Pharmacy Plan

Part-Time Option 2 Employees:

- Kaiser
- Providence Open Option Plan
- Providence Personal Option Plan
- Walgreens Prescription Mail Service
- Postal Prescriptions Mail Service
- Wellpartners Prescription Mail Service
- Providence Pharmacy Plan
- Kaiser Mail Service Pharmacy
- Caremark Mail Service Pharmacy
- Caremark Pharmacy Plan

PAT

Full-Time and Part-Time Option 1 Employees:

- Kaiser
- Trust Preferred Provider Plan
- Providence Personal Option Plan
- Trust Dental Plan
- Kaiser Pharmacy Plan
- Providence Pharmacy Plan
- Caremark Pharmacy Plan
- Caremark Mail Service Pharmacy
- Kaiser Mail Service Pharmacy
- Providence Mail Service Pharmacy
- Trust Vision Plan
- Kaiser Vision Plan
- Trust Vision Plan

Part-Time Option 2 Employees:

- Kaiser
- Trust Indemnity Plan
- Providence Personal Option Plan
- Caremark Prescription Plan
- Caremark Mail Service Pharmacy
- Kaiser Pharmacy Plan
- Kaiser Mail Service Pharmacy

OCTOBER 1 – SEPTEMBER 30 PLAN YEAR

NON REPRESENTED AND SEIU EMPLOYEES

Full-Time and Part-Time Employees:

- OEBB – ODS Medical Plan 6 PPO
- OEBB – ODS Medical Plan 7 PPO
- OEBB – ODS Medical Plan 9 – High Deductible Plan
- OEBB – Kaiser Medical Plan 1A
- OEBB – ODS Dental Plan 4
- OEBB – Kaiser Dental Plan 8
- OEBB – ODS Vision Plan 2
- OEBB – Kaiser Vision Plan 5
- OEBB – Kaiser Pharmacy Plan A
- OEBB – ODS Pharmacy Plan A
- OEBB – ODS Integrated Pharmacy Plan
- OEBB – Kaiser Orthodontia Plan A
- OEBB – ODS Orthodontia Plan

DCU TEAMSTERS

Full-Time and Part-Time Employees:

- Teamsters Trust Medical Plan A
- Teamsters Kaiser Permanente Plan A
- Providence Health Plan PPO Plan A
- Teamsters Trust Kroger Pharmacy Plan A
- Teamsters Trust Dental Plan A
- Teamsters Trust VSP Vision Plan

EXHIBIT B
PORTLAND PUBLIC SCHOOLS
CAFETERIA PLAN

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

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

EXHIBIT C
PORTLAND PUBLIC SCHOOLS
CAFETERIA PLAN

District Contribution
(Referent Section 5.1(c))

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

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

RESOLUTION No. 6418

Resolution to Adopt Revised Vacation and District Holidays for Non-represented Employees Policy 5.60.031-P

RECITALS

A. On September 8, 2021, and September 29, 2021, the Board Policy Committee reviewed and considered the proposed revisions of the Vacation and District Holidays for Non-represented Employees policy 5.60.031-P.

B. On October 12, 2021, the Board presented the first reading of the revised Vacation and District Holidays for Non-represented Employees policy.

C. On November 2, 2021 the Board made additional amendments to the revised Vacation and District Holidays for Non-represented Employees policy and presented the policy for another first reading.

D. On November 10, 2021, the Board Policy Committee recommended nonsubstantive, clarifying edits to the policy, noted on the posted policy.

E. Pursuant to District policy, the public comment was open for at least 21 days, and there was no public comment received during the comment period.

RESOLUTION

The Board hereby adopts the revised Vacation and District Holidays for Non-represented Employees policy 5.60.031-P, including the nonsubstantive edits recommended by the Policy Committee on November 10, 2021, and instructs the Superintendent to amend any relevant administrative directives to conform to this adopted policy.

Board Policy 5.60.031-P

Vacation and District Holidays for Non-represented employees

The Superintendent shall develop a vacation accrual schedule applicable to non-represented employees. The vacation accrual schedule will include the annual limit on accrued vacation that can be carried forward into a new fiscal year.

The schedule will be posted on the District website.

The Board shall approve by resolution the addition of any paid holidays for non-represented employees. Approved paid holidays shall be posted on the District website.

Legal references: ORS 332.107; ORS 332.505

History: Adopted 6/71; Amended 5/02, 6/24/02, 12/2021

Related policies: Superintendent contract policy; Administrative Employees' Terms of Employment policy

Board Policy 5.60.031-P

Vacation and District Holidays for Non-represented employees

The Superintendent shall develop a vacation accrual schedule applicable to non-represented employees ~~to be approved by the Board of Education in the form of a resolution~~. The vacation accrual schedule will include the annual limit on accrued vacation that can be carried forward into a new fiscal year.

~~Once approved,~~ The schedule will be posted on the District website. ~~Modifications to the schedule will be approved by the Board.~~

The Board shall ~~also~~ approve by resolution the addition of any paid holidays for non-represented employees. Approved paid holidays shall be posted on the District website.

Legal references: ORS 332.107; ORS 332.505

History: Adopted 6/71; Amended 5/02, 6/24/02, 11/2021

Related policies: Superintendent contract policy; Administrative Employees' Terms of Employment policy

Portland Public School District 1st Reading

DATE OF FIRST READING: November 02, 2021

PUBLIC COMMENT FOR
Policy 5.60.031-P:
Vacations and District Holidays

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

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

Last Date for Comment: November 23, 2021

Summary: **Vacations and District Holidays 5.60.031-P**

1st Reading by: **Julia Brim-Edwards**
Portland Public School Board

Recommended for a 1st Reading by:
Portland Public Schools Board of Education
Policy Committee

Draft Policy Web Site: https://www.pps.net/Page/11911

Contact: **Rosanne Powell,** Senior Board Manager
Address: P.O. Box 3107, Portland, OR 97208-3107
Telephone: 503-916-3741
E-mail: schoolboard@pps.net

Included in Packet	Page
Proposed Policy - Redlined with changes proposed at 11/02/21 meeting	03
Proposed Policy - Revisions Version 1 - Redlined Policy 1st read 10/12/21	04
Original Policy	06
Staff Memo	07

Board Policy 5.60.031-P

Vacation and District Holidays for Non-represented employees

The Superintendent shall develop a vacation accrual schedule applicable to non-represented employees ~~to be approved by the Board of Education in the form of a resolution~~. The vacation accrual schedule will include the annual limit on accrued vacation that can be carried forward into a new fiscal year.

Once approved, the schedule will be posted on the District website. ~~Modifications to the schedule will be approved by the Board.~~

The Board shall also approve by resolution the addition of any paid holidays for non-represented employees. Approved paid holidays shall be posted on the District website.

Legal references: ORS 332.107; ORS 332.505

History: Adopted 6/71; Amended 5/02, 6/24/02, 11/2021

Related policies: Superintendent contract policy; Administrative Employees' Terms of Employment policy

5.60.031-P Vacation ~~Eligibility and Scheduling~~ and District Holidays for Non-represented employees

The Superintendent shall develop a vacation accrual schedule applicable to non-represented employees to be approved by the Board of Education in the form of a resolution. The vacation accrual schedule will include the annual limit on accrued vacation that can be carried forward into a new fiscal year.

Once approved, the schedule will be posted on the District website. Modifications to the schedule will be approved by the Board.

The Board shall also approve by resolution the addition of any paid holidays for non-represented employees. Approved paid holidays shall be posted on the District website.

I. ~~Vacation Eligibility and Accrual Rate~~¶

~~(1) Administrative employees in grades 20-24, as designated by the district, shall receive an annual vacation with pay of 22 days accrued at a rate of¶~~
~~14.7 hours a month.¶~~

~~(2) Administrative employees in grades 19 and below, as designated by the district, shall receive an annual vacation with pay as specified below:¶~~

~~Completed Years of Employment~~	~~Days of vacation/rate of~~
~~accrual 1-4 years:~~	~~10 days / 6.7 hours per month¶~~
~~5 years:~~	~~11 days / 7.4 hours per month¶~~
~~6 years:~~	~~12 days / 8.0 hours per month¶~~
~~7 years:~~	~~13 days / 8.7 hours per month¶~~
~~8 years:~~	~~14 days / 9.4 hours per month¶~~
~~9 years:~~	~~15 days / 10.0 hours per month¶~~
~~10 years:~~	~~16 days / 10.7 hours per month¶~~
~~11 years:~~	~~17 days / 11.4 hours per month¶~~
~~12 years:~~	~~18 days / 12.0 hours per month¶~~
~~13 years:~~	~~19 days / 12.7 hours per month¶~~
~~14 years:~~	~~20 days / 13.4 hours per month¶~~
~~15 years:~~	~~21 days / 14.0 hours per month¶~~
~~16 years:~~	~~22 days (maximum) / 14.7 hours per month¶~~

¶

~~II. Vacation Scheduling~~¶

~~(1) It is recommended that a vacation plan for all 12-month administrative personnel be developed cooperatively with employees and their supervisors annually.~~¶

~~(2) The number of days accumulated at the end of each calendar year shall be taken by December 31 of the following calendar year.~~¶

¶

~~III. Exceptions~~¶

~~(1) Exceptions to this policy may be made in individual circumstances and shall be approved by the employee's supervisor and the superintendent or designee.~~¶

Legal references: ORS 332.107; ORS 332.505

History: Adpt. 6/71; Amd, 5/02; Rev. 6/24/02, Amd __/21

Related policies: Superintendent contract policy; Administrative Employees' Terms of Employment policy

BOARD POLICY

5.60.031-P Vacation Eligibility and Scheduling

I. Vacation Eligibility and Accrual Rate

(1) Administrative employees in grades 20-24, as designated by the district, shall receive an annual vacation with pay of 22 days accrued at a rate of 14.7 hours a month.

(2) Administrative employees in grades 19 and below, as designated by the district, shall receive an annual vacation with pay as specified below:

Completed Years of Employment	Days of vacation/rate of accrual
1-4 years:	10 days / 6.7 hours per month
5 years:	11 days / 7.4 hours per month
6 years:	12 days / 8.0 hours per month
7 years:	13 days / 8.7 hours per month
8 years:	14 days / 9.4 hours per month
9 years:	15 days / 10.0 hours per month
10 years:	16 days / 10.7 hours per month
11 years:	17 days / 11.4 hours per month
12 years:	18 days / 12.0 hours per month
13 years:	19 days / 12.7 hours per month
14 years:	20 days / 13.4 hours per month
15 years:	21 days / 14.0 hours per month
16 years:	22 days (maximum) / 14.7 hours per month

II. Vacation Scheduling

(1) It is recommended that a vacation plan for all 12-month administrative personnel be developed cooperatively with employees and their supervisors annually.

(2) The number of days accumulated at the end of each calendar year shall be taken by December 31 of the following calendar year.

III. Exceptions

(1) Exceptions to this policy may be made in individual circumstances and shall be approved by the employee's supervisor and the superintendent or designee.

Legal references: ORS 332.107; ORS 332.505

History: Adpt. 6/71; Amd, 5/02; Rev. 6/24/02 Portland, Oregon

PORTLAND PUBLIC SCHOOLS
Office of General Counsel

501 North Dixon Street
Portland, OR 97227
Telephone: (503) 916-3274

Date: October 6, 2021

To: School Board

From: Liz Large, Contracted General Counsel
Mary Kane, Senior Legal Counsel

Subject: Staff Analysis Report to the Board- Policy Revision

Policy # and Name: 5.60.031-P Vacation Eligibility and Scheduling

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BACKGROUND

The Board Policy Committee has begun a review of District policies to determine whether they continue to align with current law and practice, including reliance on a review conducted by the Department of Human Resources. Currently, the topic of employee vacations and holidays can be found in three separate policies: 5.50.064-P Religious Holidays-Teachers; 5.60.031-P Vacation Eligibility and Scheduling; and 5.70.052-P Work Year -Vacations. The Committee recommended that two of the policies be rescinded and that the Vacation Eligibility and Scheduling policy be amended. On September 29, 2021, the Policy Committee recommended that this policy go before the full Board for approval.

RELATED POLICIES/BEST PRACTICES

It is best practice for policies to be reviewed regularly to ensure that they continue to reflect and support the administrative responsibilities and actions of the District. In this instance, a single policy that is updated serves the District's interests of providing clear and accessible information.

ANALYSIS OF SITUATION

The amendments to this policy update the current outdated policies, consolidate the information into a single policy, and allow the Board to approve vacation by resolution instead of through the policy-making process .

FISCAL IMPACT

These changes will incur no financial impact.

COMMUNITY ENGAGEMENT

Because the policy is centered on internal employment decisions, there was no community engagement conducted for this policy.

TIMELINE FOR IMPLEMENTATION/EVALUATION and COMMUNICATION PLAN

Policy will be in effect upon adoption.

STAFF RECOMMENDATION

Staff recommends approval of the revised policy.

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

_____ *(Initials)*

ATTACHMENTS

A. Redline copy of Vacation Eligibility and Scheduling Policy
B. Clean copy of Vacation Eligibility and Scheduling Policy

RESOLUTION No. 6419

Resolution to Adopt Revised Administrative Employees' Terms of Employment Policy 5.60.010-P

RECITALS

A. On November 10, 2021, the Board Policy Committee reviewed and considered proposed revisions of the Administrative Employees' Terms of Employment policy 5.60.010-P.

B. On November 16, 2021, the Board presented the first reading of the proposed revised Administrative Employees' Terms of Employment policy.

C. Pursuant to District policy, the public comment was open for at least 21 days, and there was no public comment received during the comment period.

RESOLUTION

The Board hereby adopts the revised Administrative Employees' Terms of Employment 5.60.010-P and instructs the Superintendent to amend any relevant administrative directives to conform to this adopted policy.

Board Policy 5.60.010-P

Administrative Employees' Terms of Employment

I. Definitions

(1) Superintendent; Licensed Administrators; Non-Licensed Administrators

(a) Superintendent – Appointed by the Board and holds a valid, permanent or temporary Superintendents' license from the Oregon Teacher Standards and Practices Commission (TSPC.)

(b) Licensed Administrators – employees who have met the standards and administrative licensing requirements of the TSPC, hold a current administrator's license with TSPC, and are employed in a District position that requires TSPC licensing.

(c) Non-licensed Administrators - Employees of the district that are not represented by a bargaining unit, do not meet the definition of "Licensed Administrator" or "Superintendent," and whose position is classified as Grade 20 or higher on the Administrator, Supervisor, and Professional/Technical (03) salary schedule. For purposes of this policy and related Administrative Directives, a non-licensed administrator may hold a valid teaching or administrative license, but is not required by their current position to be licensed.

(2) Employment Contracts - a binding written agreement between a Licensed Administrator or a Non-licensed Administrator and the Superintendent representing the District. All employment contracts must comply with this policy. For Licensed Administrators the employment contract must also be in compliance with ORS 342.845 (5) & (6), and policy 5.60.010-P.

II. Scope and Application

(1) This policy applies to all PPS employees whose job duties or requirements meet the definition of licensed or non-licensed Administrator as defined in this policy.

(2) Notwithstanding II (1) above, the terms of employment and contract provisions for the Superintendent are not covered by this policy.

(3) Terms of employment for Administrators required by statute or allowed by this policy to have a written contract will be outlined by their individual contract. Any issues not covered by the written contract will be governed by this policy

or any appropriate policy or administrative directive.

(4) Terms of employment for Administrators not required or allowed a written contract will be governed by this policy or any appropriate policy or administrative directive.

III. General Terms of Employment – Licensed and Non-licensed Administrators

(1) Appointments & Assignments

(a) The Superintendent shall have authority to appoint, assign, or alter theassignment of, and to transfer any or all Non-represented Employees,in accordance with Oregon law, Board Policies, and District Administrative Directives, except for the employees of the Office of theIndependent Performance Auditors whom are appointed by the Board.

(b) The candidate for the administrative position shall meet standards of eligibility established for such a position, possess training and experience relevant to such a position, and, in the opinion of the superintendent, be a qualified candidate. The Board and Superintendent shall follow District policies regarding Equal Employment Opportunity.

(2) Employment contracts.

(a) The Superintendent shall develop a standard administrative contract. The standard contract of employment shall comply with all policies and administrative directives. The standard employment contract shall contain:

(A) Starting date;

(B) Position title;

(C) Work year length; however, the work year length specified in the contract may be amended or shortened due to the fiscal status of the District. If the work year is shortened and/or a furlough is imposed upon employees, the administrator's yearly salary will be adjusted accordingly;

(D) Starting salary;

(E) An ending or optional renewal date;

(F) Terms for participation in "pay for performance program, if such a program is available and approved by the Board and Superintendent; and,

(G) Term of contract and conditions for contract termination, extension, and employee resignation.

(b) The employment contract for all administrators shall be the standard administrative contract. The superintendent must seek Board approval for any exceptions to the standard contract for any

particular administrator prior to the hiring or assignment of that individual.

(c) Each administrator shall have a current employment contract on file in the district central office.

(d) Administrative contracts shall not contain provisions to expressly obligate the district to compensate an employee for work that is not performed. The employment contract may include a provision that would permit payment of severance pay of an equivalent of no more than 90 days of the base salary of the terminated employee.

(3) Benefits.

(a) The Superintendent shall develop a benefit plan that may include medical, dental, vision, long-term disability, life insurance, participation in annuity or other tax benefit program. The Board, prior to implementation, shall approve the benefit plan, and addendums to the plan, recommended by the Superintendent.

(b) All Licensed and Non-licensed Administrators shall receive identical benefits outlined in (4)(a) unless the benefit plan specifies otherwise.

(4) Evaluation. The District shall endeavor to evaluate the performance of Administrators approximately annually, or at such other intervals as may be established by district policy or administrative directive.

(5) Salary Schedules.

(a) The Superintendent shall develop salary schedules for all Administrator positions. When developing the salary schedules, the Superintendent shall consider the need to attract high quality employees as well as to work within the budgetary limitations of the District. The Board shall approve the salary schedules.

(b) Administrator salary schedules shall be based on a market analysis of compensation and benefits received for like positions in the relevant public market.

(c) The development of the salary schedule for Licensed Administrators shall also include consultation with a representative group of licensed administrators.

(d) The administrator salary schedules approved under this policy shall be published annually in the district budget report.

(e) The salary of an individual newly hired or appointed to an Administrator position shall be determined with reference to the applicable Board approved salary schedule and following an evaluation of their training, experience, and the nature of the administrative position.

(6) PERS: The district shall make the employer contribution to PERS. The employee contribution to PERS shall be made through a pre-tax deduction

from the Administrator's salary.

(7) Travel Reimbursement.

(a) The Superintendent shall develop a schedule of reimbursement for necessary travel for Administrators.

(b) The schedule may include a stipend for related travel.

(c) The schedule shall include actual mileage reimbursement levels.

(d) The schedule shall be codified in District policy and administrative directives.

IV. Additional Terms of Employment - Licensed Administrators

(1) A licensed administrator below the rank of assistant superintendent shall serve a probationary period of three years. The administrator and the district may mutually agree to a shorter probationary time period.

(2) Following successful completion of the probationary period, a licensed administrator shall, in accordance with ORS 342.845 (5), be employed pursuant to a three-year employment contract.

(3) Subsequent dismissal, reduction in pay, or contract non-extension shall be according to provisions of Oregon Law.

V. Additional Terms of Employment – Non Licensed Administrators

(1) Vacation leave for non-licensed administrators shall be granted in accordance with policy 5.60.031-P.

VI. Recruitment/Moving Expenses – Licensed and Non-Licensed Candidates

(1) Administrators normally will be expected to pay their own expenses associated with traveling and relocating to accept employment with the District, such as the expense of traveling to attend job interviews, travel to look for new housing, expenses associated with the sale of an existing home or purchase of a new home and expenses associated with moving a household to the Portland area. .

(2) In exceptional circumstances, the District may agree in advance to reimburse certain limited, reasonable expenses, such as the reasonable cost of travel and moving household goods, incurred by the Administrator in relocating to accept District employment. Such exceptional instances may involve a position for which it is difficult to find a qualified candidate after the District has undertaken reasonable recruitment efforts. This may occur, for instance, when the salary offered by the District is below market-rate and the District is not able to change the salary or a sufficient number of qualified candidates do not exist. Reimbursement for relocation expenses shall be the exception rather than the rule and shall be kept to a minimum amount necessary to meet the District's recruiting objectives.

(3) Any offer to reimburse travel for candidates or relocation expenses shall be

approved in advance in writing by the superintendent before this benefit is offered to the candidate.

(4) The Superintendent shall develop an administrative directive specifying allowable travel or moving expenses for candidates and new administrative employees.

(5) The Board shall review and approve the administrative directive.

VII. Effective Dates

The effective date for new administrators, current non-contract administrators is upon Board approval of this policy.

Legal References: ORS 332.505, 332.507, 342.120, 342.140, 342.200, and 342.845(5)&(6)

History: 6/71, 5/76, 12/77, 1/79, 9/95, amended 2/28/2005 Board Action 3225; 12/2021

Portland Public School District 1st Reading

DATE OF FIRST READING: November 16, 2021

PUBLIC COMMENT FOR
Policy 5.60.010-P:
Administrative Employees' Terms of Employment

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

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

Last Date for Comment: December 07, 2021

Summary: **Policy 5.60.010-P Administrative Employees' Terms of Employment**

1st Reading by: **Julia Brim-Edwards**
Portland Public School Board

Recommended for a 1st Reading by:
Portland Public Schools Board of Education
Policy Committee

Draft Policy Web Site: https://www.pps.net/Page/11911

Contact: **Rosanne Powell,** Senior Board Manager
Address: P.O. Box 3107, Portland, OR 97208-3107
Telephone: 503-916-3741
E-mail: schoolboard@pps.net

Included in Packet	Page
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Redlined Policy with Proposed Changes	04
Original Policy	05
Staff Memo	11

MEMO

TO: Portland Public Schools Board of Education

FROM: Liz Large, Contracted General Counsel

DATE: November 12, 2021

SUBJECT: Amendment to Administrative Employees' Terms of Employment Policy 5.60.010-P

The Administrative Employees' Terms of Employment Policy, 5.60.010-P, governs the authority to hire and promote Administrators and defines the terms of their employment. It was last amended in 2005.

On September 28, 2021, the Board suspended Sections III(1)(a) and (c) and V(1) in Resolution No. 6374. The resolution further directed the Policy Committee to review the policy and bring forward recommended revisions to the policy by January 1, 2022.

On November 10, 2021, the Policy Committee considered amendments to those sections of the policy suspended by the resolution, including revising the policy to clarify that the superintendent has the authority to appoint, assign, or alter the assignment of non-represented employees other than the independent auditors that report directly to the Board. The Policy Committee did not suggest amending Section V of the policy in light of the amendments to Policy 5.60.031-P (vacations) that have been through two First Readings before the Board.

The revised policy language was developed in collaboration with staff, agreed to by the Superintendent, and recommended unanimously by the Committee for First Reading.

5.60.010-P 11/9/21 DRAFT

Delete Section III(1) (a) and (c) and (2)

Insert a new Section III (a)

(1) Appointments & Assignments. The Superintendent shall have authority to appoint, assign, or alter the assignment of, and to transfer any or all Nonrepresented Employees, in accordance with Oregon law, Board Policies, and District Administrative Directives, except for the employees of the Office of the Independent Performance Auditors whom are appointed by the Board.

5.60.010-P Administrative Employees' Terms of Employment

BOARD POLICY

11/9/2021 Draft

I. Definitions

(1) Superintendent; Licensed Administrators; Non-Licensed Administrators

(a) Superintendent – Appointed by the Board and holds a valid, permanent or temporary Superintendents' license from the Oregon Teacher Standards and Practices Commission (TSPC.)

(b) Licensed Administrators – employees who have met the standards and administrative licensing requirements of the TSPC, hold a current administrator's license with TSPC, and are employed in a District position that requires TSPC licensing.

(c) Non-licensed Administrators - Employees of the district that are not represented by a bargaining unit, do not meet the definition of "Licensed Administrator" or "Superintendent," and whose position is classified as Grade 20 or higher on the Administrator, Supervisor, and Professional/Technical (03) salary schedule. For purposes of this policy and related Administrative Directives, a non-licensed administrator may hold a valid teaching or administrative license, but is not required by their current position to be licensed.

(2) Employment Contracts - a binding written agreement between a Licensed Administrator or a Non-licensed Administrator and the Superintendent representing the District. All employment contracts must comply with this policy. For Licensed Administrators the employment contract must also be in compliance with ORS 342.845 (5) & (6), and policy 5.60.010-P.

II. Scope and Application

(1) This policy applies to all PPS employees whose job duties or requirements meet the definition of licensed or non-licensed Administrator as defined in this policy.

(2) Notwithstanding II (1) above, the terms of employment and contract provisions for the Superintendent are not covered by this policy.

(3) Terms of employment for Administrators required by statute or allowed by this policy to have a written contract will be outlined by their individual contract. Any issues not covered by the written contract will be governed by this policy or any appropriate policy or administrative directive.

5.60.010-P Administrative Employees' Terms of Employment

BOARD POLICY

(4) Terms of employment for Administrators not required or allowed a written contract will be governed by this policy or any appropriate policy or administrative directive.

III. General Terms of Employment – Licensed and Non-licensed Administrators

(1) Appointments & Assignments

(a) ~~The Board upon recommendation by the superintendent shall authorize the promotion of an existing employee or the hiring of a new employee into an administrative position.~~ The Superintendent shall have authority to appoint, assign,or alter the assignment of, and to transfer any or all Non-represented Employees, in accordance with Oregon law, Board Policies, and District Administrative Directives, except for the employeesof the Office of the Independent Performance Auditors whom are appointed by the Board.

(b) The candidate for the administrative position shall meet standards of eligibility established for such a position, possess training and experience relevant to such a position, and, in the opinion of the superintendent, be a qualified candidate. The Board and Superintendent shall follow District policies regarding Equal Employment Opportunity.

~~(c) Except as stated in this policy, no administrator shall begin work for the District prior to Board approval of the employment contract. Exceptions shall be approved by the Superintendent and the Chair of the Board in writing, and the full Board shall be informed of the exception prior to the work commencing. The employment contract shall presented to the full Board at the next scheduled Board meeting~~

~~(2) Assignments. The superintendent shall have authority to assign, or alter the assignment of, and to transfer any or all administrators in accordance with Oregon law and Board policies and directives.~~

~~(3)~~(2) Employment contracts.

(a) The Superintendent shall develop a standard administrative contract. The standard contract of employment shall comply with all policies and administrative directives. The standard employment contract shall contain:

(A) Starting date;

(B) Position title;

(C) Work year length; however, the work year length specified in the contract may be amended or shortened due to the fiscal status of the District. If the work year is shortened and/or a

furlough is imposed upon employees, the administrator's yearly salary will be adjusted accordingly;

(D) Starting salary;

5.60.010-P Administrative Employees' Terms of Employment

BOARD POLICY

(E) An ending or optional renewal date;

(F) Terms for participation in "pay for performance program, if such a program is available and approved by the Board and Superintendent; and,

(G) Term of contract and conditions for contract termination, extension, and employee resignation.

(b) The employment contract for all administrators shall be the standard administrative contract. The superintendent must seek Board approval for any exceptions to the standard contract for any particular administrator prior to the hiring or assignment of that individual.

(c) Each administrator shall have a current employment contract on file in the district central office.

(d) Administrative contracts shall not contain provisions to expressly obligate the district to compensate an employee for work that is not performed. The employment contract may include a provision that would permit payment of severance pay of an equivalent of no more than 90 days of the base salary of the terminated employee.

~~(4)~~(3) Benefits.

(a) The Superintendent shall develop a benefit plan that may include medical, dental, vision, long-term disability, life insurance, participation in annuity or other tax benefit program. The Board, prior to implementation, shall approve the benefit plan, and addendums to the plan, recommended by the Superintendent.

(b) All Licensed and Non-licensed Administrators shall receive identical benefits outlined in (4)(a) unless the benefit plan specifies otherwise.

~~(5)~~(4) Evaluation. The District shall endeavor to evaluate the performance of Administrators approximately annually, or at such other intervals as may be established by district policy or administrative directive.

~~(6)~~(5) Salary Schedules.

(a) The Superintendent shall develop salary schedules for all Administrator positions. When developing the salary schedules, the Superintendent shall consider the need to attract high quality employees as well as to work within the budgetary limitations of the District. The Board shall approve the salary schedules.

5.60.010-P Administrative Employees' Terms of Employment

BOARD POLICY

(b) Administrator salary schedules shall be based on a market analysis of compensation and benefits received for like positions in the relevant public market.

(c) The development of the salary schedule for Licensed Administrators shall also include consultation with a representative group of licensed administrators.

(d) The administrator salary schedules approved under this policy shall be published annually in the district budget report.

(e) The salary of an individual newly hired or appointed to an Administrator position shall be determined with reference to the applicable Board approved salary schedule and following an evaluation of their training, experience, and the nature of the administrative position.

~~(7)~~(6) PERS: The district shall make the employer contribution to PERS. The employee contribution to PERS shall be made through a pre-tax deduction from the Administrator's salary.

~~(8)~~(7) Travel Reimbursement.

(a) The Superintendent shall develop a schedule of reimbursement for necessary travel for Administrators.

(b) The schedule may include a stipend for related travel.

(c) The schedule shall include actual mileage reimbursement levels.

(d) The schedule shall be codified in District policy and administrative directives.

IV. Additional Terms of Employment - Licensed Administrators

(1) A licensed administrator below the rank of assistant superintendent shall serve a probationary period of three years. The administrator and the district may mutually agree to a shorter probationary time period.

(2) Following successful completion of the probationary period, a licensed administrator shall, in accordance with ORS 342.845 (5), be employed pursuant to a three-year employment contract.

(3) Subsequent dismissal, reduction in pay, or contract non-extension shall be according to provisions of Oregon Law.

BOARD POLICY

5.60.010-P Administrative Employees' Terms of Employment

V. Additional Terms of Employment – Non Licensed Administrators

(1) Vacation leave for non-licensed administrators shall be granted in accordance with policy 5.60.031-P.

VI. Recruitment/Moving Expenses – Licensed and Non-Licensed Candidates

(1) Administrators normally will be expected to pay their own expenses associated with traveling and relocating to accept employment with the District, such as the expense of traveling to attend job interviews, travel to look for new housing, expenses associated with the sale of an existing home or purchase of a new home and expenses associated with moving a household to the Portland area. .

(2) In exceptional circumstances, the District may agree in advance to reimburse certain limited, reasonable expenses, such as the reasonable cost of travel and moving household goods, incurred by the Administrator in relocating to accept District employment. Such exceptional instances may involve a position for which it is difficult to find a qualified candidate after the District has undertaken reasonable recruitment efforts. This may occur, for instance, when the salary offered by the District is below market-rate and the District is not able to change the salary or a sufficient number of qualified candidates do not exist. Reimbursement for relocation expenses shall be the exception rather than the rule and shall be kept to a minimum amount necessary to meet the District's recruiting objectives.

(3) Any offer to reimburse travel for candidates or relocation expenses shall be approved in advance in writing by the superintendent before this benefit is offered to the candidate.

(4) The Superintendent shall develop an administrative directive specifying allowable travel or moving expenses for candidates and new administrative employees.

(5) The Board shall review and approve the administrative directive.

VII. Effective Dates

The effective date for new administrators, current non-contract administrators is upon Board approval of this policy.

Legal References: ORS 332.505, 332.507, 342.120, 342.140, 342.200, and 342.845(5)&(6)

History: 6/71, 5/76, 12/77, 1/79, 9/95, amended 2/28/2005 Board Action 3225

BOARD POLICY

5.60.010-P Administrative Employees' Terms of Employment

I. Definitions

(1) Superintendent; Licensed Administrators; Non-Licensed Administrators

(a) Superintendent – Appointed by the Board and holds a valid, permanent or temporary Superintendents' license from the Oregon Teacher Standards and Practices Commission (TSPC.)

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(2) Employment Contracts - a binding written agreement between a Licensed Administrator or a Non-licensed Administrator and the Superintendent representing the District. All employment contracts must comply with this policy. For Licensed Administrators the employment contract must also be in compliance with ORS 342.845 (5) & (6), and policy 5.60.010-P.

II. Scope and Application

(1) This policy applies to all PPS employees whose job duties or requirements meet the definition of licensed or non-licensed Administrator as defined in this policy.

(2) Notwithstanding II (1) above, the terms of employment and contract provisions for the Superintendent are not covered by this policy.

(3) Terms of employment for Administrators required by statute or allowed by this policy to have a written contract will be outlined by their individual contract. Any issues not covered by the written contract will be governed by this policy or any appropriate policy or administrative directive.

5.60.010-P Administrative Employees' Terms of Employment

(4) Terms of employment for Administrators not required or allowed a written contract will be governed by this policy or any appropriate policy or administrative directive.

III. General Terms of Employment – Licensed and Non-licensed Administrators

(1) Appointments

(a) The Board upon recommendation by the superintendent shall authorize the promotion of an existing employee or the hiring of a new employee into an administrative position.

(b) The candidate for the administrative position shall meet standards of eligibility established for such a position, possess training and experience relevant to such a position, and, in the opinion of the superintendent, be a qualified candidate. The Board and Superintendent shall follow District policies regarding Equal Employment Opportunity.

(c) Except as stated in this policy, no administrator shall begin work for the District prior to Board approval of the employment contract. Exceptions shall be approved by the Superintendent and the Chair of the Board in writing, and the full Board shall be informed of the exception prior to the work commencing. The employment contract shall presented to the full Board at the next scheduled Board meeting

(2) Assignments. The superintendent shall have authority to assign, or alter the assignment of, and to transfer any or all administrators in accordance with Oregon law and Board policies and directives.

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5.60.010-P Administrative Employees' Terms of Employment

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(F) Terms for participation in "pay for performance program, if such a program is available and approved by the Board and Superintendent; and,

(G) Term of contract and conditions for contract termination, extension, and employee resignation.

(b) The employment contract for all administrators shall be the standard administrative contract. The superintendent must seek Board approval for any exceptions to the standard contract for any particular administrator prior to the hiring or assignment of that individual.

(c) Each administrator shall have a current employment contract on file in the district central office.

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(b) All Licensed and Non-licensed Administrators shall receive identical benefits outlined in (4)(a) unless the benefit plan specifies otherwise.

(5) Evaluation. The District shall endeavor to evaluate the performance of Administrators approximately annually, or at such other intervals as may be established by district policy or administrative directive.

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BOARD POLICY

5.60.010-P Administrative Employees' Terms of Employment

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Legal References: ORS 332.505, 332.507, 342.120, 342.140, 342.200, and 342.845(5)&(6)

History: 6/71, 5/76, 12/77, 1/79, 9/95, amended 2/28/2005 Board Action 3225

RESOLUTION No. 6420

Resolution to Rescind Board Policies

Rescission of

i. 3.40.091: Traffic Safety Patrols
ii. 4.50.010: Student Interviews And Errands
iii. 4.50.020: Health Services
iv. 4.50.023: Dental Health Services
v. 6.10.013: Career Education – Learning Opportunities
vi. 5.20.100: Physical And Mental Health Of Staff Members
vii. 3.20.011-P Planning Time
viii. 5.20.080-P Evaluation of Teachers

RECITALS

A. On October 19, 2021, the Board of Education's Policy Committee reviewed and considered the necessity and relevance of:

i. 3.40.091: Traffic Safety Patrols
ii. 4.50.010: Student Interviews And Errands
iii. 4.50.020: Health Services
iv. 4.50.023: Dental Health Services
v. 6.10.013: Career Education – Learning Opportunities
vi. 5.20.100: Physical And Mental Health Of Staff Members

B. On November 2, 2021, the Board presented the first reading of each of those policies for rescission.

C. The public comment period was open for at least 21 days, and no public comments were received.

D. On November 10, 2021, the Board of Education's Policy Committee reviewed and considered the necessity and relevance of:

i. 3.20.011-P Planning Time
ii. 5.20.080-P Evaluation of Teachers

E. On November 16, 2021, the Board presented the first reading of each of those policies for rescission.

F. The public comment period was open for at least 21 days, and no public comments were received.

RESOLUTION

The Board hereby rescinds each of the following policies:

i. 3.40.091: Traffic Safety Patrols
ii. 4.50.010: Student Interviews And Errands
iii. 4.50.020: Health Services
iv. 4.50.023: Dental Health Services
v. 6.10.013: Career Education – Learning Opportunities
vi. 5.20.100: Physical And Mental Health Of Staff Members

vii. 3.20.011-P Planning Time
viii. 5.20.080-P Evaluation of Teachers

Portland Public School District 1st Reading

DATE OF FIRST READING: November 02, 2021

PUBLIC COMMENT FOR
Rescissions of the following policies:

- 3.40.091: Traffic Safety Patrols
- 4.50.010: Student Interviews And Errands
- 4.50.020: Health Services
- 4.50.023: Dental Health Services
- 5.20.100: Physical And Mental Health Of Staff Members
- 6.10.013: Career Education – Learning Opportunities

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

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

Last Date for Comment: November 23, 2021

Summary: **Rescissions of the following policies:**

- 3.40.091: Traffic Safety Patrols
- 4.50.010: Student Interviews And Errands
- 4.50.020: Health Services
- 4.50.023: Dental Health Services
- 5.20.100: Physical And Mental Health Of Staff Members
- 6.10.013: Career Education – Learning Opportunities

1st Reading by: **Julia Brim-Edwards**
Portland Public School Board

Recommended for a 1st Reading by:
Portland Public Schools Board of Education
Policy Committee

Draft Policy Website: https://www.pps.net/Page/11911

Contact: **Rosanne Powell,** Senior Board Manager
Address: P.O. Box 3107, Portland, OR 97208-3107
Telephone: 503-916-3741
E-mail: schoolboard@pps.net

Included in Packet	Page
Staff Report	03
3.40.091: Traffic Safety Patrols	04
4.50.010: Student Interviews and Errands	05
4.50.020: Health Services	06
4.50.023: Dental Health Services	07
5.20.100: Physical and Mental Health Of Staff Members	08
6.10.013: Career Education – Learning Opportunities	09

PORTLAND PUBLIC SCHOOLS
OFFICE OF LEGAL COUNSEL

501 North Dixon Street / Portland, OR 97227
Telephone: (503) 916-3274

Date: November 2, 2021

To: School Board

From: Mary Kane, Senior Legal Counsel

Subject: Recommendations for policy rescissions

The Board Policy Committee met on October 19, 2021 to discuss resumption of review of policies to determine which needed updates and which should be rescinded. Six policies were put forward by staff with recommendations that they be rescinded. After discussion, the Policy Committee recommended that the following six policies be forwarded to the full Board with a recommendation for First Reading en route to rescission:

a. **3.40.091-P Traffic Safety Patrols**

This policy was adopted in 1971 and amended in 2002. The policy is outdated in both content and language that does not constitute a policy.

b. **4.50.010-P Student Interviews and Errands**

This policy was adopted in 1971 and amended in 2002. The policy has outdated language and the content is better reflected in the Student's Rights Regarding Searches and Professional Conduct policies.

c. **4.50.020-P Health Services**

This policy was adopted in 1971 and amended in 2002. The policy has outdated language and is a long-standing practice that is governed by statute, contracts and Board resolutions.

d. **4.50.023-P Dental Health Services**

This policy was adopted in 1971 and amended in 2002. The statutes upon which the policy was based have been repealed and the policy is out of date and not needed for dental clinics.

e. **5.20.100-P Physical and Mental Health of Staff Members**

This policy was adopted in 1971 and amended in 1995. The policy is outdated in both content and language. The District does not employ a medical advisor and there are current practices in place to reflect the intent of this policy.

f. **6.10.013 Career Education- Learning Opportunities**

This policy was adopted in 1971 and amended in 2002. The District has career education programs; however, this is not a policy.

3.40.091-P Traffic Safety Patrols

BOARD POLICY

(1) Schools should include in their safety education programs instruction on avoiding traffic, sidewalk and street hazards. In addition, because younger children may need special assistance in crossing streets while going to and from school, the office of superintendent shall make recommendations to the Traffic Safety Division or other appropriate agency in the formation and operation of student patrols. From time to time the superintendent may identify situations where such programs are insufficient and make recommendations to the appropriate governmental agency for the resolution of those problems.

(2) Participation by students as safety patrol members must be by written consent of their parents, and special programs of training shall be provided to assure the effective performance of safety patrol duties.

Legal References: ORS 339.650 - 339.665; ORS 811.015

History: Adpt 6/71; Amd 9/9/02; BA 2419

4.50.010-P Student Interviews And Errands

BOARD POLICY

(1) **Interviews**.

(a) Since the Board and its employees are responsible for the welfare of Portland students, ordinarily only employees of the district engaged in official business shall be permitted to interview a student. In unusual circumstances, when it is deemed in the best interest of the student and the school, another person may be authorized by the principal or his/her designated representative to contact a student. When an interview by another person is authorized, a staff member designated by the principal shall be present at the interview, except when such person is a parent or legal guardian. (Refer to special provisions on child abuse for law enforcement officers and Services to Children and Families caseworkers.)

(b) An overriding issue in determining when a person who is not a parent is to be permitted to contact a student in school is whether or not such an interview is in the best interest of the student and the school. Principals are directed to exercise extreme care in granting such permission.

(c) When parents are divorced, it may be necessary to obtain information about visitation rights of the respective parents before permitting contact with students while in school.

(2) **Errands**.

(a) Students shall not be sent from the school premises by any member of the school staff to perform errands, except when necessary to the operation of the school, and then only with parental permission.

Legal References: ORS 329.150; ORS 332.107; ORS 419B.015

History: Adpt 6/71; Amd 11/82; Amd 9/9/02; BA 2420

Letter Opinion, Office of the Attorney General (August 18, 1986)

4.50.020-P Health Services

BOARD POLICY

(1) Although the primary responsibility of the district is for the education of children, the health and welfare of the students in the Portland schools is a matter of major concern to the Board. It is the intent of the Board that school programs in general be conducted in a manner which enhances student and personnel health and which is conducive to good health practices.

(2) Physicians, licensed nurses and other personnel of the designated public health agency who may provide direct health services or consultation with school staff regarding student health problems are authorized to provide services in the schools to the extent that their services may be available and in accordance with resolution services and/or contractual agreements developed cooperatively with the district.

(3) The superintendent shall direct the development of programs through which the intent of this policy shall be carried out and through which all members of the district staff are apprised of their responsibilities in this sphere.

Legal References: OAR 581-022-0705; OAR 581-022-1420; OAR 581-022-1440

History: Adpt 6/71; Amd 7/12/76; Amd 9/9/02; BA 2420

4.50.023-P Dental Health Services

BOARD POLICY

(1) In the interest of good dental health for all students, instruction of healthful dental care practices shall be a part of the instructional program in the schools of the district. Through such programs it is hoped that all students will develop sound oral health habits.

(2) In order to meet the particular oral health needs of low-income students, the Portland schools, in conjunction with the Multnomah County Dental Society and the Assistance League of Portland, may operate a dental clinic. Such clinic or clinics shall provide for the dental care needs of low-income children in the elementary grades K-8. The office of the superintendent shall arrange with the Assistance League for the services of dentists and such other personnel and programs necessary to the operation of the dental clinic. The Assistance League shall schedule all patients, provide the volunteer dentists, provide the services of full-time dentists, maintain all records and underwrite all prosthetic appliances. The district shall provide building space, equipment and supplies as deemed appropriate.

Legal References: ORS 336.375 - 336.420

History: Adpt 6/71; Amd 9/9/02; BA 2420

BOARD POLICY

5.20.100-P Physical And Mental Health Of Staff Members

The physical and mental health of persons who work in the education of young people is vital. Emotional stability, adequate physical vitality and general good health essential to the performance of duties must be assured for appointment to and continuance in the district.

(1) **Appointment and Duties of Medical Advisor**. Accordingly, the Board shall select a duly qualified physician to serve at its pleasure as the medical advisor for the school district. He/she shall perform such medical examinations as may be required in accordance with Board policy and the procedures established by the office of the superintendent. He/she shall also act as the medical examiner for the teacher's retirement system.

(a) Compensation of the medical advisor shall be determined by the Board and shall be either on a retainer or fee basis or both.

(b) The medical advisor shall have authority to obtain the services of consultants and laboratories when he/she deems such service is necessary. The cost of these services shall be borne by the school district, provided that an examination costing in excess of $100 shall not be conducted without prior authorization of the office of the superintendent.

(2) **Superintendent's Responsibility**. The superintendent shall develop procedures which assure that a probationary and/or a permanent teacher shall be referred to the when his/her emotional stability, physical capacity or general health are such as to raise doubt about his/her ability to carry out of his/her assignment.

Legal References: ORS 332.107; ORS 342.513; ORS 342.545; Rehabilitation Act of 1973, 29 U.S.C.A. Sections 504, 791, 793 and 794 (West 1985); Americans with Disabilities Act of 1990, 42 U.S.C. Section 12101 et seq. 29 CFR Part 1630

History: Adpt. 6/71; Amd. 5/76; Amd. 7/12/76; Amd. 9/95

BOARD POLICY

6.10.013-P Career Education – Learning Opportunities

The public schools are responsible for providing every young person with learning opportunities that will enable him/her to discover his/her individual interest and abilities. Those learning opportunities should help the student explore the many avenues of productive activity that might challenge and extend his/her talents of choice, self-direction, self-discipline and responsibility. Therefore, an orientation to the world of work and preparation for a career are necessary to each student's development. The Board gives priority to career education programs and will provide additional financial assistance to such programs as it becomes possible.

Legal References: ORS 366.035; OAR 581-022-0405

History: Adpt 6/71; Amd 9/9/02; BA 2421

Portland Public School District 1st Reading

DATE OF FIRST READING: November 16, 2021

PUBLIC COMMENT FOR

Policy Rescissions:

- 5.20.080-P Evaluation Of Teachers
- 3.20.011-P Planning Time

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

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

Last Date for Comment: December 07, 2021

Summary: **Policy Rescissions:**
- 5.20.080-P Evaluation Of Teachers
- 3.20.011-P Planning Time

1st Reading by: **Julia Brim-Edwards**
Portland Public School Board

Recommended for a 1st Reading by:
Portland Public Schools Board of Education
Policy Committee

Draft Policy Web Site: https://www.pps.net/Page/11911

Contact: **Rosanne Powell,** Senior Board Manager
Address: P.O. Box 3107, Portland, OR 97208-3107
Telephone: 503-916-3741
E-mail: schoolboard@pps.net

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5.20.080-P Evaluation Of Teachers	05

3.20.011-P Planning Time

BOARD POLICY

Important contributions to good education can accrue from professional planning and in-service programs which involve the entire staff of the district. In recognition of this and for the purpose of conducting such meetings, the Board may incorporate into the regular school calendar time during which students will not attend school.

Legal References: ORS 332.075 (1)(a); OAR 581-022-1620

History: Adpt 6/71; Amd 9/9/02; BA 2419

5.20.080-P Evaluation Of Teachers

BOARD POLICY

(1) **Evaluation of Employee Performance**.

(a) A program of systematic evaluation of employee performance is essential, both for determining fitness for retention as a member of the staff, and as a basis for guidance and assistance in improving competencies and performance.

(b) It is the expectation of the Board that new teachers will look upon the probationary years as a time when extensive development of teaching skills should occur and when the foundation for continuous growth should be established and that each tenure teacher shall be continuously concerned with the evaluation of his/her own performance, with continuous professional growth, and with the increasingly effective use of all district instructional resources. Administrative evaluations shall reflect high standards of expectation for teacher performance. In keeping with state law, which empowers the Board to dismiss a probationary teacher for any reason it deems in good faith sufficient, it shall not be required of administrators that they prove incompetence when not recommending a probationary teacher for a subsequent contract. Teachers whose competence and performance do not, in the judgment of the administrative staff, meet the district's standards shall not be recommended for permanent status.

(c) The performance standards for district teachers and the evaluation process with respect to their services shall be governed by this policy and the "Portland School District Teacher Evaluation Process," described in Board Resolution No. 8505, adopted September 22, 1980 as thereafter amended from time to time. The performance standards described therein are subject to amendment only by the Board. The remaining sections, exclusive of the "Job Descriptions," but including all procedural steps described therein, are adopted by the Board but are subject to amendment from time to time on the authority of the superintendent. The content of the "Job Descriptions" (with the exception of that for the superintendent) is established on the authority of the superintendent and is subject to amendment on the authority from time to time. The superintendent shall supplement the "Portland School District Teacher Evaluation Process" booklet, above described, with appropriate administrative directives and regulations, as deemed necessary to implement the process.

5.20.080-P Evaluation Of Teachers

(2) **Multiethnic Education — Standard of Performance**.

(a) The competent teacher in subjects with multiethnic dimensions includes appropriate multiethnic themes in lesson plans and instruction, including historical or other information as to cultures having significant impact on the world, nation or community.

(b) The competent teacher and administrator are aware of and appreciate cultural diversity and the importance of communication skills reflecting sensitivity to the feelings of all persons, regardless of their race, color, religion, sex, age or national origin and do such preparation and take such training as is necessary to develop such awareness and appreciation in herself or himself.

(c) The competent administrator takes appropriate steps within his/her responsibilities to cause the elements in a. and b. above to be reflected in the school instructional program and evaluates those teachers and administrators subject to his/her evaluation and supervision with respect to their performance regarding a. and b. above. The level of competent performance required shall be determined by the professional judgment of the supervisor of the teacher or administrator.

Legal References: ORS 243.650; ORS 332.505; ORS 342.850; OAR 581-022-1720

History: Adpt. 6/71; Amd. 9/71; Amd. 1/8/79; Amd. 8/25/80; Amd. 9/22/80