



Community Budget Review Committee (CBRC)
Meeting Minutes

Date: Thursday, February 27, 2025
Time: 5:30 pm - 7:30 pm
Location: (Virtual) The meeting will be streamed live under the provision of
ORS 192.670 at: <https://www.youtube.com/@ppsfinance/live>

MATERIALS

[CBRC Budget Document Training and Legislative Updates](#)

ATTENDEES

CBRC Attendees

Caitlin Bice
Minyana Bishop
Karanja Crews
Jen Gray-O'Connor
Aaron Cronan
Grace Groom
Natan Hadgu
Sonya Harvey
Mariah Hudson
Adriel Person

Staff Attendees

Tami Booth
Junho Chang
Alexandra Martin
Lisa Merrick
Michelle Morrison

Board Attendees

Patte Sullivan

Public Comment

None

MINUTES

5:35 pm

- Opening - Committee Co-Chair
- Welcome and introductions
- Housekeeping

Mariah Hudson opened the meeting at 5:35p.

Board Director Patte Sullivan introduced herself.
Staff shared brief updates and summarized the agenda.

6:10 pm

- CBRC Leadership Vote

CBRC voted on leadership
Mariah Hudson was elected CBRC Chair.
Adriel Person was elected CBRC Vice Chair.

6:30 pm

- Budget Document Training

Staff provided a training on volume 1 of the budget.

7:05 pm

- Legislative Updates

Staff provided state and federal legislative updates.

7:30 pm

- Closing - Committee Co-Chair

Mariah Hudson adjourned the meeting at 7:00 pm.

TRANSCRIPT

WEBVTT

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It looks like it's after 5.30. Are we waiting for folks to join?

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Are we getting close to quorum?

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Yeah. Hi, Mariah. Good evening. I think we should start soon. I'm just um I think we didn't have quorum a moment ago and maybe we're at six right now.

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Yeah, let's give folks another couple of minutes here. I'm off camera. I'm in transit here, but very much listening in.

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Okay, that sounds great. Thank you.

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All good. Thanks for letting us know.

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One of our staff participants said that their camera and microphone are not working.

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I hope no one else is having that issue. I can adjust that for a step.

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Team member. So that should fix it for them if anyone else is having that issue.

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Maybe would you use the raise hand function if your camera and mics seem like they're not working and I can adjust it?

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Okay.

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Yeah, it works now.

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Great. Thanks, Erin. Patty, I think yours should work too.

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Can you hear me? Yeah, okay. Must be.

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Yeah, I can hear you. Great.

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Great. Thank you.

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You're welcome. Thank you for being here. Um... I still see um Our two student representatives are here.

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I still see only five CBRC members who have three-year terms.

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Or our adult members. So I think we can give it another couple of minutes and give a little time and grace for folks who are coming from other engagements.

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Natan. And I'll be like at home in a couple of minutes and I'll just switch to a laptop and turn on my camera then, okay?

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Perfect. Thanks for letting us know.

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How many do we need for a quorum?

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Okay, so...

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Quorum is six. Yeah, so we can just wait for one more member

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Good evening. Welcome to this group.

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We have enough members. I think, to get started, but Mariah, I think you said you're in transit. Either Mariah or Grace... from our CBRC leadership team, would you let me know if Awesome. Would you like to kick us off?

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I'm here. Yep, I'm absolutely here.

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Yeah, let's convene the meeting here and um No announcements here, just getting started with our last meeting here in February.

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Reminder that we have the meeting with the board on Tuesday, March 4th.

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And let's dive right into our presentations. Thank you. Oh, do we have housekeeping reminders that we need to go through?

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Okay.

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Thanks so much, Mariah. I do have some and I know you're in transit, so I can walk through those, Mariah, and then um And we can get started.

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Awesome. Thank you, Mariah. Okay, folks, we started a little bit late. It's 542, so I will go ahead and be quick in our housekeeping items. This is our overall agenda tonight.

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We have introductions with our budget director, Tammy Booth, joining us. Wanted to describe the process for topics and questions and answers this year.

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Like Mariah stated, we have a work session with our Board of Education coming up on March 4th, this Tuesday.

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Would like to touch on electing our CBRC leadership possibly in this meeting if we do have enough CBRC members who continue to be in the space.

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And our budget team will share a budget document training with us so we can start to get into the technical details of the budget and how it's presented.

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And we have legislative updates from Lisa Merrick, who is our PPS Senior Manager of Government Relations, and she will be hopping on. She let me know she's going to be here around 645. So we have about an hour for this content before she's able to join us.

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And so, like I stated, I'm so, so happy and thankful to be able to introduce our new budget director. So this is incredible. We're so happy to have this experienced expert joining our team and supporting the work and leading the work.

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So Tammy, I'd love to kick it over to you for a quick introduction.

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Hi, everybody. I'm Tammy Booth, new budget director. I've been here a little over a week and I'm really excited to engage in this work with you and Tonight's book, my focus is going to be learning and observing and hearing

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What comes out of this committee so that I can work with an incredible team to make sure that we continue to deliver quality budgets that honor the community's intention.

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Thank you so much. So happy to see new faces here and more leadership for our finance functions at Portland Public Schools.

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So I wanted to touch on the process and make sure everyone was comfortable and with and aware of how questions and answers can come to your staff support.

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In the Community Budget Review Committee so wanted to prompt you all with what are your big questions for this budget cycle. I've received some questions from just a few members so far.

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And it will be really important to start to raise those early in the process as much as possible. I understand we don't have a lot to react to right now.

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But as we move further along, we have more questions, more assumptions are shared or forecasts are shared or any of these areas.

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Where we're sharing more detail when you have those questions, it's great to hear from them early so that we can connect with the right folks to bring the information to you.

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So please start thinking about these big questions. We can even hold time for some discussion on that. I think a lot of our members might be in transit right now, so we can, you know.

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Come back to that optionally later in this meeting before we adjourn.

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As a discussion topic as a If you want to just think about it, what are your big questions? What are you wondering about for 2526 school year budget development Please email me when you have those questions.

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And in our document, I linked to our running list of questions and answers, and we'll maintain that throughout the process. So I got a lengthy batch of questions last week that were updated and there are a couple of items there that we've

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Shared about in meetings or will share about in meetings um so Those are on our list. We're aware of them. And as early as we can hear about them, we can start responding to them.

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Are there any questions or is that clear for folks about how you can state your questions and if you if you would like to state what some of your big wonderings are right now, we can use some committee time for that.

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I'll just pause and give some space for that question. What are your big questions for this cycle?

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I'll just ask really quick, and I apologize, I haven't seen the running list of questions. So if this covers someone else's questions, again, I apologize but I'm just curious um how PPS, how the budget reflects sort of evolving federal funds and restrictions around particular commitments to DEI.

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Specifically, and how this budget forecast might be kind of responding to that.

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That's a great question. We do touch on that a little bit in our session tonight, more in terms of legislative updates. So it's a more macro level response to that, but we do have our chief financial officer, Michelle here. I don't know, Michelle, if you would want to

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Speak to that a little bit Now, and I'll also record it so we can respond later.

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No, thank you so much for that question. And Alexander for the opportunity to speak to it. I know that it is top of mind for everyone right now.

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The information that is coming from the federal government around education initiatives and I know we have a team, our legal department and our grants team are monitoring closely.

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The activities. I know that we are anticipating a 25% reduction potentially to our Title I program.

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But we're also looking at our other more direct grants that are very targeted towards the areas you're concerned about. I think I don't think that we've issued yet a statement, but I know that that's coming as part of the budget development process and as

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As we learn more information. There are so many structures built around those federal programs that it would be really really challenging for anyone to make sweeping change.

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Without a whole lot of additional legislative changes. And those are supported bipartisan at this time.

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So I know that that's a lengthy non-answer. But we are everyone's on point and watching and prepared to support our kids.

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And however, we need to. And I know that Dr. Armstrong, Superintendent Armstrong.

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Has mentioned that in several presentations regarding the budget.

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Thank you, Vishal. That's very helpful.

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Yeah, thank you again, Jen, for that question for us. Grace?

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I have a question. Go ahead, Chris.

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That's fine. I was just going to let that other person speak before me.

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Grace, we saw your hand up and then it went down so Maybe we should come back to you i don't know do you

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Okay, Mignana, I think you're up

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Hi, I'm Inanna Bishop. I do have a question. Maybe this is fitting, maybe it's not, but it has been on my mind a lot the last month.

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In regards to the schools that are not currently in use.

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And how that affects the budget. I know I just bought a house across from Kitten.

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Elementary school and it's really sad to see that there's not much going on with it. And so it made me wonder how many other schools are not in use and how does that affect the budget and what are the plans? I mean, I know we probably don't really know the plans, but Just seeing the lights on.

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All day, all night and stuff like that. It just made me wonder what other buildings and um what could we possibly be doing budget wise with those buildings?

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Great question. Maria, I don't know if you want to respond to that.

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Or if I...

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I'll just say, I think that's going to be a very prescient issue because whether or not it's in the water with PPS right now, I think in the community, people are interested with enrollment being down.

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About the issue of school closures and whether or not school closures do or don't actually save the district money.

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So I think having some discovery around that would be of interest to me and perhaps the committee at large.

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Michelle, would you want to speak to that right now or we can get back to the committee with a response later?

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Just... Just a high level statement around our facilities and our declining enrollment.

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I know that as we move into this next phase of capital projects, we're really going to look carefully at Our neighborhood schools the facility condition and our ability to staff them as our enrollment declines and what's really going to provide the most robust programming for kids.

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So just watch for more information that's big work that's going to take a little bit of time to come together, but I know that our superintendent and our board are really focused on that as well.

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Grace, let's get back to you.

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Thank you. And I am in transit, so my camera is not going to be on but One of the questions I had was about the I forget the exact term used, but basically the weighted or differentiated staffing model and how that may be impacted

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As we are moving. Towards budget cuts and also when the current political climate And also the impact on the equity allocation.

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Thank you, Grace. Mariah, I was wondering if you're able to, I know in an email exchange between us, you had also asked a question about equity, but it was a little bit brief. I was wondering if you could flesh that out and if it was connected to Grace's question that she's just stated.

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Well, I think... maybe we'll get a little bit more guidance from our government relations director here in a bit. I mean, it's hard to kind of know how some of the proposed changes are going to fallout legally.

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But, you know, wondering about the impact on funding and with PPSs, 8% equity allocation to certain schools.

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You know, with potential changes in that funding what what the downstream effects are going to look like, what PBS is recommendations may come through as may come through you know, there's a lot of moving pieces around that and what equity looks like here.

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And just thinking about, I mean, for me, it's about how we're best supporting kids, right? How we're supporting them and getting the best outcomes. And I think Grace is, well, I know Grace's very supportive of the same thing, right? We're after the same

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Supporting kids and getting those best outcomes. So understanding how we can align that budget or at least provide recommendations on that.

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I think I'll probably have more specific questions. As we get a draft budget.

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Before we get the budget from our superintendent And can really look into that and compare to last year.

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And see a few years running. I think just we want to look at it.

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You know kind of where the trends have gone.

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Caitlin, I see your hand up.

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Can you hear me? Okay, we're good.

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I can't hear you, but it's a little bit quiet.

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Sorry, I don't really know how to fix that. Can you understand me?

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Okay, I just had a small question actually about what we talked about at the last meeting.

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Yeah.

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Specifically about where cuts were being made and at the high school level.

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One of the things that I saw was that the high school staffing formula was going to increase by one student.

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And I was just wondering what is the current formula of staff to students and is that the same across all schools.

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Thank you, Caitlin. We will have updated information about that that reductions table that we shared. So that will be updated through the process.

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We also will have a deeper dive into school staffing in an upcoming meeting.

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And so we typically share information that's presented in our volume to individual school reports as well as school staffing information.

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We can point that information out In this session, we do have school staffing information in our volume one, and then you can see more detailed information in our second volume of the budget book.

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So I hopeful we'll be able to connect you to the right resources. Partially in this meeting and then more deeply in an upcoming meeting.

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Okay, thank you.

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Mr. Cruz, when you came into the meet, your hand was up. It might have just been to be moved into this panelist.

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Space, but wanted to see if there were any questions that you have about that you'd want to register for this upcoming budget cycle.

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Or if there was anything else that you had raised your hand for.

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No, it was just to be transferred over.

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Okay, well, welcome and thank you for joining. If there are not other questions right now, oh, Mariah, go ahead.

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I'll just say really quick. I don't want to go into it here, but big topics I think we need to look at the maintenance where things are getting paid from in terms of operating budget versus kind of those emergency expenditures that we've seen come through the board, especially with the ice storms in the past few years and

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The impact that those have had and thinking around planning. The issue of the reserves, especially with things coming through with federal funding. And I also want to look at things like our expenditures around transportation and thinking through You know, even things like start times and some of the other things impact outcomes around attendance and so forth.

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As they relate to budget. So not to dive into that here, but just to kind of lay those out as topics that might be of interest to this committee.

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And lastly, I just wanted to ask, what could we as a committee ask of staff and think about in terms of expectations, in terms of a timeline if we had a kind of specific budget or data question.

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To think about what would the timeline for asking that and having that answered.

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So we can know.

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Thank you, Mariah. And you were the member that I referenced earlier that you had provided rather a lot of or you had provided those several items that you just discussed in an email thread between us. And so I've recorded those on our questions answers document. You can let me know if you would want to refine the language or refine the ask in any of those. I don't.

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Recall that you had mentioned transportation, for example. So if it's a wider scope we should look into that and let me know how we can adjust it so that we're responding to what the real question is and the breadth of the question.

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As we go. Through this process, some of these questions I think we can answer more generally or like Michelle has in this meeting at a high level now And when there are more specifics about maybe a year over year change.

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That tends to come out later in the process. So it's not a great answer, but I would say that it depends on the timeline.

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We'll be responsive as possible. Our Board of Education is also sometimes asking similar questions and so these conversations with CBRC.

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I think are helpful for our leadership here to start to be able to have public facing information ready.

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Not just for the board, but for the community generally. Hi, Director Sullivan. Go ahead.

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Yes, I'd just like to say that's right. It's really nice that you're bringing these questions up because we have the same ones.

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And I'd like to just say hello. I missed the first two meetings. I had others.

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Stuff to do. But I did watch both the meetings and i just I want to say I'm really excited about working with you and everybody has such good questions and It's just really good for me to be here.

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Thank you.

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Thank you, Patty, for slowing me down and sorry to overlook that you haven't joined yet. So thank you so much for being in this space. I know sometimes we cross wires with schedules and I'm so glad you're here.

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Me too.

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Okay, so it's six o'clock. I think we should move on, but just always let me know if there's anything else on your mind and we can work to address it.

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Like Mariah had stated, we do have an upcoming work session with our Board of Education. So on March 4th, this upcoming Tuesday.

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The focus is on our budget community engagement findings and sharing just a little bit about some of the integrated grant milestones.

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The integrated grant is a collection of programs at our state level, for example, SIA, the student investment account, Measure 98, High School Success. So it is a suite of programs with some requirements around engagement and needs assessment, other pieces.

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And we'll be sharing just a little bit about the milestones at that work session and then sharing more about the timeline for that application and sharing more of the information.

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That went into budgeting for those dollars. And then the budget community engagement findings. I hope you've seen and how our administration has prioritized the Budget community engagement and with many, many different stakeholders. And so it continues to be a very robust process that we're going through.

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And we wanted to share some of the findings and summary information.

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Our start time is estimated to be seven. It actually said 7.05 in the agenda that I saw, but I do know that sometimes it could be earlier or later, depending on those other items.

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And the space will be our profit center, so 501 North Dixon Street in Portland.

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You could also join on Zoom if that's needed. But all of our CBRC members are invited to attend and engage with our board at that time.

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I would like to know if you are going to be there in person or if we should plan for you to join on Zoom. So after this meeting, I'm going to follow up with an email.

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And ask that question so that we can plan and expect to see some faces in person or on Zoom and accommodate that in the conversation.

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Are there any questions about that work session? The information was just posted to our board book, which is our public facing board material website. And so when you click that link, you should be able to scroll down and see our slide deck.

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For that session.

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Okay. Moving along, this is just our upcoming meeting, so it does include that March 4th session that I just named with the board.

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And then our next CBRC meeting is March 20th. We have another one March 24th.

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So our proposed budget, I should have added it on here, but our proposed budget will be heard by the board or presented by our superintendent, Dr. Armstrong, on April 22nd.

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This is just a couple of days after that proposed budget presentation.

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And then we'll hold time for additional working meetings in April and May. I'll look to schedule those as soon as possible so we can hold the time And then our reports, the local option levy review and the proposed budget review will be presented on May 6th

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Just really quickly as an FYI, I had stated that the current year budget amendment was going to be heard by the board. That was our plan at the time. And we've since shifted the plan. And so this will be postponed and heard at a later meeting.

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Okay, so we would like to touch on the on electing CBRC leadership, we've had a couple of meetings where we've shared our co-chairs and vice chairs have shared their perspectives about this And some folks have stated their interest or continued interest in this.

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And if the committee is ready, we can go ahead and vote on this. I think, Mariah, you had suggested we do this at the top of the meeting. We are running a little bit over time, but closer to the top of the meeting.

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The committee members that I heard from over the course of the past couple of months who who would be interested in are there we have about see what Actually, six folks have stated some level of interest or willingness in doing this.

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Our current structure is two co-chairs and two vice chairs. And um some some summary findings or summary statements about what this commitment looks like were shared in prior meetings.

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Mariah, you had helpfully shared that it's helpful to have a diversity of opinions. You've stated that we've typically had a consensus document and our chairs kind of support that process to creating that.

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Consensus. We've also flagged that it's a heavier lift for those leadership members. They seem to take a big role in drafting content and content in And also, I've observed in engaging with our board in terms of presenting the information to our board

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And they take a role in agenda setting. For these items that that we cover in our meetings.

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So I'll pause there if there was anything else that folks had questions about or wanted to state about the commitment and then um I can share the names of the folks who've stated some interest.

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And then we can describe our structure and process that we want to take to vote.

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Are there any questions or other comments more generally? And then we can shift to structure.

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Okay. So like I stated, two co-chairs, two vice chairs That's four people.

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I think Mariah in our December meeting you had maybe talked about a structure, but you didn't state your thoughts, or I don't recall that you had stated your thoughts. Did you have any feedback or suggestions about a different structure, maintaining the same structure

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I think it can work well having co-chairs if both people feel that they're ready and willing to be engaged.

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In the process, there's enough work to do that having somebody who's having one of the co-chairs who feels like they have good, strong organizational skills and kind of wants to put their arms around getting people engaged and kind of tracking that process and somebody who's more engaged in kind of the writing or the fleshing out of the document. I'd be happy to serve in either of those roles if that's open to But I think that can work very well.

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Invite the whole committee to be really engaged in that because there's, you know, again, a lot to go through with this.

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So many opportunities to provide for really good perspective on this to the board.

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I think one other thing that's helpful with the structure and been for for people is that level of lift and leaning on each other um And I'm observing that we have six members here who are interested and so that would accommodate the most number of people. In some years we have fewer people who are interested.

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So would the committee, sorry, Mariah, go ahead. Would the committee like to confirm that structure or are there any other questions? We don't need to vote on the structure um But if we're okay with it, we can go ahead and move forward and vote.

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Okay. So in terms of folks who were interested.

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Stefan stated in our prior meeting that they would be interested in or willing to continue to serve on that and a vice chair role.

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But also stated that Stefan stated they would step aside if other people were interested. So I wanted to state that because Stefan is not in the space and let me know that they were not able to attend.

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Similarly for DASH, I did receive an email from her and the comment was was willing to participate and support And then... Mariah, of course, we know you have stated throughout when we've had these conversations, your interest. And I heard you just stay in either role

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And Mignana, I heard you state last time that you were interested. I'll pause here if you would like to affirm that or if you had any other questions.

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Maybe Mignana is not

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At the time at this time I think... I'll pass so I can get a little bit more knowledge and experience.

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I just think it might be too much for my schedule commitment wise.

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Thank you. That's very fair. And thank you for being realistic with your schedule. We know it's a big live.

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Adriel. I heard some interest possibly from you. Would you like to affirm that and and do you have any other statement that you would like to make?

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I am open to vice chair.

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Thank you. And Taz, you have served as, oh wait, is Taz in the space? Sorry.

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Okay, Taz is not here. Taz stated in one of the meetings that she would like to support possibly in another way. And then towards the end of the conversation said that she was opening to continue to serve in the leadership role.

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So that would be...

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Dash having interest. Mariah having interests stefan has an atrio.

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And I know that Stefan stated if folks were interested.

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That they would step aside and it was similar for for dash We could take this in phases and we could we could elect those folks who are here in this space right now and can speak for themselves and then we could

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We could return to this another time. I'm a little bit concerned about the time.

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Do any of our CBRC members have opinions or direction that you would like to offer to the group about how we how we take our next steps here when we don't have all the folks who have stated interest in the space.

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Is there an option for a voting survey so that everyone will have a choice?

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To make a decision. Or do we need to do it in space for quorum's sake?

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Right. That's a good question. I understood that we did need to be in this space and have quorum and that's due to public meetings law. I do like what you're saying. Adriel that would be a that would probably be

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Beneficial for the community members, but I don't think that that is within our public meeting law. I have always seen these types of decisions happen in the space.

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Yeah, I mean, I guess my thoughts on this are if they're not here and they didn't give an excuse for not being here.

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I would question the dedication. So I would focus more on the folks that are here.

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And want to vote in the people that are interested that are currently present.

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Okay, so... Yeah, Jen, go for it. Thank you.

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Yeah, I just want to second Erin's comment that I would support being able to make a decision at this meeting so that we can continue to move forward. I know this is time sensitive, although I really, really loved Adriel's suggestion.

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But also your response that due to public meeting laws, like we have to keep moving. And so, yeah, support Aaron's suggestion.

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Okay, so... we can propose those CBRC members that we can propose which role they would slot into, we've talked about co-chairs and vice chairs so of our structure going forward into this cycle is two co-chairs and two vice chairs um

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We have Mariah, who has served as our co-chair um in this prior cycle.

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We have Adriel who has stated that she would be interested in being a vice chair.

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And Grace, go ahead. You're currently a vice chair and you serve as a vice chair in the prior cycle. So I'd love to hear from you.

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Hi, finally made it home. I just, first of all, wanted to say that I think that Mariah's done a really great job of keeping everybody organized and so um I'm glad that you want to continue to serve in that way. Mariah, I'm wondering

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Just structurally, if it makes sense to have vice chairs be having more years left of their term of service, you know, sort of like a president and vice president and as the vice chairs sort of learn the ropes from the

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From the co-chairs. And I don't know where everybody is on this list in terms of their when their service is up.

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So... Mignana was appointed this year and so um will continue on for the the highest number of remaining years.

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Eachriel has been on our committee for one whole cycle. And so, Grace, what you're stating would um would apply, Adriel, if you were interested in In that, in continuing In the upcoming year.

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And then we had many, many members all join in the same year so um So we're actually going to see a lot of attrition on this committee at the end of this cycle.

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Yeah, I know we need to move on with this here really soon here. I am comfortable chairing with this if we don't have someone that strongly wants to coach her with me, I would invite someone. And if we have someone who in a future meeting wants to come in and co-chair and help organize this, or if one of our vice chairs wants to step up into that role with me, I'm happy to share it if I'm elected.

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I'll just say that now. I really just want to make sure that the process gets moved forward. It's not about controlling the outcome or what goes in the document, but about just getting this move forward and helping us work through this as a committee.

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Also. If there's somebody that wants to join join in this. I'm happy to partner with them now or later.

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I would hope, can we move this to a vote for the folks that are here

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I like that suggestion a lot. Mariah so um So right now in the space, we have Mariah who has suggested or offered to serve as chair as chair And pending any further interest from other people, we could adjust the structure.

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But the vote right now would be to vote Mariah as chair We can take them one at a time so we can pause and do that vote. And then April, you've stated you would be interested in being vice chair.

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And so I would suggest that those are the two votes that we make right now based on the folks who are in this space.

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Okay, so the way that we've done this before and it's worked pretty well is please um Put up your raised hand function in Zoom.

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Come off mute if you don't understand what that is or how to do that so that we can count your vote and you can say aye.

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And right now I'll put it on the table We are... voting on Mariah's candidacy for chair of the community budget review committee Please put up your raised hand if you would like to vote for that for Mariah.

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Okay. Just to clarify our board director and i think you know patty would not vote And our staff members, of course, will not vote.

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So I'm sorry to put you on the spot, Grace, but I heard you verbally state that you would support Mariah.

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And I do not see your And.

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Oh, I clicked raise hand. I don't know why you don't see it, but yes.

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Okay. Okay. Yes. Okay. Great.

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Okay, so that is the majority of our CBRC members in this space

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Okay. I see seven CBRC members. And just to state this, I'm not our student members Similar to how our board student representative more students, their votes are not tallied, which is strange because you are members of our committee But I've not tallied those.

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That is confirmed. Mariah will be our chair of the Community Budget Review Committee.

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For this upcoming cycle. Thank you. Okay, please put your hands down And now the next leadership member that we'd like to vote on is Adriel Adriel, you stated your willingness to serve as vice chair this year, so please CBRC members

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Put up your raised hand function to vote for Adriel for our vice chair.

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In case you can't see mine again, this is Grace. And yes, I vote for Adriel.

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Great. Okay, I do see it now. Thank you, Grace. Okay, that was that tally is the same. We have seven members voting and so I'll confirm that we have Adriel in the vice chair function so Thank you so much.

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For your service. This is great. I'm glad that we were able to take this big step as a committee. So thank you so much.

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Feel free to lower your hand so that I know if you do have a question or any other comment before we wrap this up.

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Okay. Thank you. Let's go ahead and move on. I appreciate y'all bearing with us.

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Through that process. Okay, so let's go ahead and get into the meat of some of the more content of our agenda Like I stated, we want to share a budget document training so that when you all receive these multi hundred page documents later in our cycle.

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You will hopefully be a little bit less overwhelmed. What we're sharing tonight is our current year adopted budget document and that um to what we adopted back in June of 2024 and this guides our this is our plan for spending for for this current school year that we're in.

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So in our in our slides that I've linked to in our email and are posted on the CBRC website.

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You'll have a link there. If you click into the link, that will take you to this volume that we're describing.

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Our objective here is to build an understanding of the reports and content in our documents to support your analysis later.

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I wanted to just state and like Caitlin had asked about, for example, that high school staffing allocation. We'll get more into those kind of details When we look into the volume two report, that'll be in an upcoming meeting And just to state, I have another link here to our annual comprehensive financial report.

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So our budget is our plan. And then when we present information in our financial report.

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Those are the actual results that are audited about how we ended the year. So I'm clicking, if you click into that, that will take you to our most recent version that shows our actual spend at our school district.

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So just a couple slides and then we'll start clicking into the document.

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We, like I stated, and you all know, the budget is the district's plan. We are estimating what our resources are and what our requirements or expenditures are.

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When we're budgeting. So we're looking forward, we're looking at a lot of information and pulling together a lot of different pieces that are unknown and making our best guesses.

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We budget by fund and every fund has a budget. Present the budget every fund includes appropriation levels by major function.

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So we will share more about what that means, all of that language can be a little bit confusing, but when you start looking into the reports and what they're presenting in the details, I think it does start to make more sense.

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When we talk about function, we're talking about the purpose of the service or activity. Could be instruction or support services.

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And the object describes what's being paid for, so salaries or payroll costs and we have different reports that present both of those. We have reports that are by function or by object. And those are presenting all there's a lot of data that's that's

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Summarized in any of those individual rows, but that's how we present our budget.

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Ultimately, what we track towards is our schedule of appropriations. This provides our legal spending limits within each fund and every major fund must balance and this is the basis of spending, like I stated.

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Okay, so please bear with me while I go to our budget document While it's going to take me just a minute to pull this up. So if there are any questions.

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Would welcome them right now.

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Okay.

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So I believe you can see my screen. It's kind of hard to tell from me.

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Can someone give me a thumbs up if you see our adopted budget document that has a hummingbird on it My screen share is working.

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Okay, great. Thank you. Like I said, you should be able to click into this document and follow along yourself.

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I wanted to state quickly about the functionality of this document so When we click, this is our table of contents. When you click into those those items that we see in the table of contents It will bring you to

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To the content so you don't have to scroll through endlessly. You can use this function. Another function I wanted to highlight that I use a lot is when you're looking in the PDF and many of you or all of you would probably know, but I can do a control f

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And then I can type in. What I would like to look for. So if I want to see where the district has stated their objectives, we can look at And then it will bring me to that content. So that's a very helpful function. You can even use it for numbers.

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If you wanted to, you know, you were interested in the reserves or some number and you wanted to see how it carries through across the document, that's another way that you can use it.

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So I wanted to state or flag that we pursue a budget award and that is the first content that you see here.

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And that really guides how we present the information and the organization of our document and what we ultimately include in there.

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Our budget document is broken out. Into several sections. We have an executive summary Which should present a liftable summarized version of the high level aspects of our budget it includes reports, charts, major changes.

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It includes our CBRC staff or members and administrative personnel. So all of these are meant to be liftable pieces that can serve the information needs. And so this is a summary that we have at the beginning of our book. And then we do focus on an organizational section. And this has, again, kind of high level or

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Guiding factors for our school district We have a financial section which provides all of those details about our district finances and like I said, organized by fund with reports by function and object.

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We have an informational section. And these are statistical factors, school staffing factors.

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Many other pieces of our organization and then appendices. When you receive the proposed budget, there was only a couple of items that you see in the appendices, but There's an expenditures overview and function codes, especially when you look in the

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In the proposed budget. So I'm going to kind of pretty quickly go through what we see in the executive summary. I won't go page by page. And then I'm going to reserve the rest of the time for Juno to discuss what we see in our financial section.

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So like I stated, our executive summary is high level. We kick off with a message from our superintendent. You can see our interim superintendent when this was released was Dr. Sandy Husk.

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We usually provide a graphical breakdown of the budget or a one pager that shows these main elements We share what the budget document format is and then a calendar district goals and objectives, of course, because these are our guiding vision as we develop the

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Through the process. And these are all summarized versions of that. And there's more detail, like I stated in the organizational section.

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The budget overview, I would say is especially helpful to read. It is very text heavy, but this really has many of our basic assumptions. So how did we prepare the budget?

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What kind of engagement did we follow you know this state's closing the budget gap it's it's saying at the high level what we were tracking towards.

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Stating that our pandemic funding is ending what happened with our integrated grant development And it has a short school staffing summary And it states our budget assumptions. So I know a lot of you, even through this process have asked, for example, what is what

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Does this budget assume in terms of the state school fund? So all of this information is here for you. It also states the assumptions around expenses.

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We provide our debt detail schedules. And um summary information that's specific to what we actually see in the reports. And usually we're describing it as a percent change or a year over year change.

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Some of our reports present information by all funds, which combines all of those five funds that I mentioned into a summary report.

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And then we do have reports here that are individual to each fund.

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We also include three-year forecasts. So we look at what we project for the next few years.

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And, you know, describe other key topics like contingencies and fund balance.

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So you can see how we summarize this here. We also have a enrollment summary, property tax summary, and a summarized version of school staffing changes.

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So I would say if you were going to invest time in reading something end to end, this budget overview is very, very helpful to invest a little bit of time because it does state all of the highlights.

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Our organizational section is about goals, like I said. We have, you know, how do we organize our administrative staff and leadership? Who is our school board?

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Where are our schools and programs in our city? What are the goals?

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And what are our strategic investments? We have a table here that states the amounts and the the outcomes or purpose, the goals that we expect.

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Um and describes the budget process that we go through. Cbrc is mentioned throughout this document. Again, we have our budget calendar that seems duplicative because we saw it in the executive summary.

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This is... is repeated here because like I stated, these are meant to be liftable documents so that they can serve different information purposes.

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This is our fund structure, like I stated. We have five funds and they're organized into sub funds and Juno will cover more of that when we get into our financial section.

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We include our board policies that are relevant to this planning activity. So our racial equity policy, contingencies and reserves, administrative directives that are focused on spend. So those are what we've highlighted here in the organizational section that impact budgeting. I think that was pretty quick. I think throughout this, if you have any questions or would like to slow down.

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Please feel free to raise your hand, but I did want to reserve the rest of the time for Juno so that we can we can get into the details of what we present in our financial section.

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Great, thanks. Let me, if you don't mind, I'll take over the screen share.

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If you all can see...

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My screen here.

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So a couple of things like Alexandra mentioned, you can click on any one of these in the table of contents to go directly to it.

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So if we were to go to the financial section, you can click on that.

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Over here, though, on the left-hand side, you can look at the smaller thumbnail pictures, but over here The PDF also has a built-in table of contents so you can also kind of drill into that same table of contents if you're elsewhere in the document.

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So this is the financial section. It does have a quick financial overview.

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The financial section is kind of broken down in levels. And so what we will see that here are some definitions of our funds, our functions and our objects.

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Which are also um which are also in greater detail in our appendices.

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But our level one is our all funds. This is a total district. I'll look at the entire district as a whole.

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And at each of these levels, we're going to see kind of three uh see the information broken out in three different ways.

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So the all funds will see the resources. These are our revenues plus our beginning fund balance.

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And after all funds level, that level one, you're going to see the district-wide breakdown of those resources.

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You'll also see in each of these kind of levels. You'll also see a narrative that you might want to kind of So familiarize yourself with.

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And then... So the first one is all funds resources and then we'll go into all funds requirements so while The resources are the revenues plus the beginning fund balance. The requirements are all our expenditures or expenses.

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Plus our reserves, which include contingency and ending fund balance. So we'll go into the requirements breakdown by major function, like Alexander said, the function is kind of the program In essence, in essence the objective of what we're spending on.

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And then we have our all funds requirements by object. So this is a breakdown of exactly what we're spending on.

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Spending on payroll like salaries and benefits, are we paying for contracts or Supplies and materials and that stuff.

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So again, each of these sections will have these kind of three key areas. Again, it's the resources.

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And then requirements by function and requirements by object. Again, you can see the breakdown and every one of our financial detail tables will have three years of actuals our current year budget and then our proposed year's budgets or next year's budget.

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We'll have a forecast as well. I believe that we are going to develop these forecasts for the adopted version.

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And then, of course, our interfund transfer Here is a couple of important reports that you might want to take a look over. It's our variance report. This is something that also is going to be developed for the adopted version.

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And then we get into what is called level two. So these are the kind of

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It breaks it down by our major funds. So this is the general fund. Again, we're going to see kind of that concept, resources, requirements.

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And requirements broken down. Each of these major funds has a pretty hefty block of narrative to familiarize yourself with.

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And then we'll see those same three charts. We're going to see general funds by Resources.

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And then requirements by major function and requirements by major object. And then within that major fund, we're going to drill down Even further. So this is our detail. This is our level three You can see all of the different line items for

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Again, our resources right here And then we're going to see our requirements by function And then our requirements by object.

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And that is the level three for the 100s. All the other major funds are broken down the same way.

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In the general fund, we have this. Kind of breakdown of the FDE structure And then a breakdown of the different groups of employees like licensed and classified and so on.

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Every so often throughout this kind of detailed section, we're going to have chunks of narrative that give our assumptions, the assumptions that went into building the budget.

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So you can read along those. I'll kind of jump ahead a little bit.

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So for special revenue, so these are our 200 funds. This includes our grants, our IG, our SIA funds on nutrition and so on.

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Again, you're going to see an overall summary of all the 200s.

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You can run to those same three charts with their breakdowns And then it'll go into individual funds, so the sub funds, which is what Alexandra was talking about earlier. Again, there's going to be a little bit of a narrative blurb here.

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And then it'll go into the actual details. And again, it's going to be broken down by resources by object, requirements by function, requirements by object.

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One thing to note is in the 400s. You can get some detailed narrative on our capital projects that are going on and that includes our school modernization efforts and our plans for the next year.

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And then... Again, it's the same financial breakdown, but then at the end of this section

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We're going to have the bond summary right here. That's some good information.

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One more piece is any all other planned capital projects.

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Any questions about the financial section?

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Okay. And then the informational section.

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This has a lot of useful information as well, things on property taxes and levies and so on.

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A couple of things that I would like to point out here is we get a good look at what our

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Personnel resource allocations are So this kind of gives us a good idea of how much of our dollars are coded to direct instruction as opposed to some of our supports.

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And then here is our FTE by major function and employee type. Again, it's broken down by kind of that higher function. So for example, this is primary instruction, which means elementary instruction and so on.

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And then it breaks it down by licensed staff, classified staff.

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Another thing, Caitlin, you were asking about like our ratios with regards to the staffing formula. So if you click right here on school staffing you'll kind of see all the assumptions that went into creating the rules for the staffing formula.

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So specifically to answer your question. For high schools.

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Here is the high school section, the 912 formulas and you can see all the assumptions that went into that. So you can see here the ratio of students to staff.

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The breakdown for the breakdown for how these schools are staffed in any given role, like principals and administrative assistants and social workers and so on. And so there are so multiple permutations of the staffing formula, little elements that are tweaked here and there.

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Based off of me, things like high school equity And then any additional needs-based FTE and so on. So this is a really good resource.

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To kind of familiarize yourselves with the staffing.

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And then we have a couple of extra pieces about For example, our student performance and our student demographics, which is really interesting.

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And then we also have our glossary. Any questions?

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I know I kind of breezed through that pretty quickly. Yes, Erin.

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Can you link to this exact one? Because the PDF I have is, it looks like it was just the printed. There's no like interactive side thing or it's like two pages glued together

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Oh, sure. Yeah. How I got there was I went to pps.net slash budget And then right here, there's annual budgets.

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Okay.

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Okay, if you scroll down just a little bit. And then when you click on there on the right hand side, you'll see annual budgets and you'll see the 2024-25 annual budget volume one And if you click on that, you should get this.

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I'll do that.

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Okay, great. And how is it?

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Yeah, I don't know if that helped Erin, if it was the same link or not, but if you're able to, it might help to download it and view it in Adobe if you have that.

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I did. Yeah, I'm still getting the same thing where it's like the pages are It's two pages and no matter how much I zoom in, they're showing me them and there's no sidebar.

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Maybe a different browser would help. That's sometimes I truly love.

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I'm wondering if this is like an adobe extension, Chrome extension And so maybe because I'm looking at that are web-based Adobe, it might be giving options If you... If you do download it and have... it open in adobe.

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Yeah, you're just split.

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Can you guys see my Adobe now? Okay, so, so this is the same document just in Adobe. And then over here on the bookmarks.

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You can open up the bookmarks and know how the entire table of contents.

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Oh, maybe I'll try that. Okay.

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So you can.

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Quick comment, Mariah, before, I guess how you had your hand up but um I will ask y'all if you would like to have a printed copy and so that will help when we're looking at the 2526.

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Maria, do you want to jump in?

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I just want to ask, you know, if there's anything that he particularly wanted us to pay attention to.

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These are really big volumes but really big volumes And then you called out a bunch of stuff here.

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Yeah, again, I really would um The school staffing is actually just, it's a really good chunk of information. I know it's a lot of kind of detailed data. But if you do have a question, a specific question about school staffing.

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This is a really good area to kind of find answers. If you don't find the answers here Please feel free to ask us and we can get back to you.

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But it also is broken down kind of neatly with by like K5, K8 year And then you can scroll down to middle schools. So six through eight, and then you can scroll down even further to, or sorry, middle schools are right here.

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And then scroll down to high schools. The formula here is broken down pretty well. I would recommend reading this or using it as a reference if you have a question specifically.

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About that. A lot of the questions around funding is likely going to be coming likely going to be about the general fund and or grants.

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So kind of familiarizing yourselves with the narratives of the gen fund and the grant funds. And so up here in the financial section, if you go to The general fund summary, this is a really great narrative also includes kind of our assumptions and so on. And then our special revenue funds. And if you drill down on the special revenue funds, the grant funds, which is fund 205.

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Is going to be very useful. And then things like that, if you have questions about the SIA, this will have a little bit of information about SIA as well.

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And then you can actually look at the expenditures if you're curious about that.

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A couple. I'm trying to think of if there's anything else.

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Yeah, absolutely. Yeah.

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Can I add something. Juno real quick? I wanted to flag that we also are going to have a new sub fund for Measure 98 in this upcoming budget cycle, so you'll be able to see that breakout for the one of our integrated grant programs for measure 98.

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And that'll provide the similar transparency like you see here for SIA.

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And then you already flagged it, Juno, but I would also agree that in the informational section, the personnel allocations and budgeted positions reports, FTE by major function and employee type.

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I've seen that be especially helpful in providing the transparency and seeing those year over year changes. And it's also summarized at a pretty high level.

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So you can draw some conclusions about how those resource allocations have changed over time.

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But, you know, we also have Was there anything else, Juno?

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I think that's good. And also, if you're interested in like the property taxes and our levies and so on.

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Appear earlier in the informational section, we do have some more of the details around that. And there's one little thing that's over here. I think it's this one. No, this one.

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This is kind of a good idea. Both brief history, but also just in general its effect on the average homeowner.

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This is kind of like the impact to a given community.

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So, um. How the property taxes are calculated and so on.

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I see multiple hands up.

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I want to... Yeah, and I was, you know, let's not forget we have Michelle and Tammy here. And so if they're, I mean, y'all are new. So I think we're kind of leaning on us as having been staff members supporting the process for

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For years but tammy michelle you're new to the document, but from your perspective or other organizations I would say feel free to jump in if you have anything that you would have seen be impactful for community members.

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Thanks, Alexandra. I would say that the budget message at the very front of the book should really be One of the first things that you look for because that is the superintendent's message about what's different as we move into the next year from the prior year.

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And some of those contingencies, for example, when we propose this budget and when we move through the adoption process, we likely won't know yet from the legislature exactly how much money is going to be appropriated to K-12 education for the biennium. And so again, this is our

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Our best work based on the information we have at the time that we have it so i think Understanding that it's not concrete just because we've put it here in the budget.

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We are still going to have to manage within the resources that we receive.

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I think just like running your household budget, I think it's important to recognize that.

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Thanks, Michelle. I would agree with that. And I think that the superintendent's budget message, that executive summary the role of the group is to review, evaluate, and provide recommendations.

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And ensure alignment with the board goals. So really getting acquainted with what those goals are and using your individual perspective and lenses as you look through it to offer perspective.

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I think is helpful. So my suggestion is really just about framing There's some longer narratives.

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And so picking and choosing if you need to, I think leaning into to the areas that you're less familiar with will be helpful.

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As well. And of course, you know, we're ready to be a resource to make sure that You know, as we work through this, we're getting this to the best that we can. Like Michelle said, with the information we have

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At the time that we're presenting. And as information changes You know, we'll have to be prepared to respond to that. And that's also part of the work of this committee.

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So use us as your resource.

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Director Sullivan?

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Thanks, Tammy. So, yeah.

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Yes, I'd just like to say you are Everyone was offered an actual book.

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And I found that much easier to look at. Than to be scrolling.

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Take them up on the offer.

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I meant to take it down and then I wanted to put it back up.

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Erin, did you have your hand up before?

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Okay. This is where I'm hitting a wall and I'm i I can't imagine I'm the only one doing this. I look at this and it's like my doctor just gave me my blood work.

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And here's a bunch of information. And they're like. Go for it. Well, I'm like, well, does that number mean a good thing or a bad thing? Like, I just have more of that or less of that. I don't understand what that means.

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In reality, is my kid going to be in a class of 20 kids or a class of 35 kids?

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Like those are the things and so like How does any of this turn into rubber meets the road?

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Like the executive statement at the top says really nothing. I mean.

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Truly, there's not a piece of takeaway information there. So I'm looking for like.

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What does this mean? To us, to our kids, what does this translate to?

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I can see a number changed. Okay, what does that mean? And so do we need like a cross-examine section or like a Like, how do we get to something meaningful from this?

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Can I jump in and say budget book two? I want to say from last year pages around 10 and 11.

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It takes the breakout by school and it heat maps it. And that data starts to get into like what you're looking for a little but in that In that next budget book and then it breaks it out by school

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In volume two. Okay.

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In volume two of, yeah. I'll let the experts jump in here.

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Or even you that somebody that actually can look at this and go, oh yeah, I've got enough familiarity with this. But to me, it's just Greek.

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And I'm like, I'm not used to, you know, I'm trying to make a decision about whether or not I'm for something or against something or how I feel about it if I don't understand what the button does.

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Yeah, I know you've voiced that in prior cycles to aaron and so i i I personally hear you and I agree with Mariah that volume two does offer that school by school transparency and transparency And when I look at this, I look into the changes that I see.

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Okay.

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From the from you know what what are we experiencing now at my school and what does it look like the resource level will be in the upcoming year?

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And I wanted to elevate as well that Mr. Cruz in prior meetings, you have stated the focus on evaluating the budget and how do we evaluate those programs.

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There's the next level of the next level depth or nuance.

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That CBRC is actually tasked with getting to to say is how is this meeting goals And some of that information is also included in volume two when we look at some of those statistical student outcome factors that are presented here. So every school has some school

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School outcome detail that that will help a little bit but I do agree, Erin, that this is a really complex area.

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Yeah, and we will, like I said, we do want to do a deeper dive into volume two later in the cycle.

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Adriel, you've had your hand up for a minute, so thank you for waiting.

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No worries. My request is just to be able to come and pick up printed copies. I do better with that as well.

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I can make notes and do all the things for my questions.

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So I just want to know when they'll be available for pickup or will they be mailed to me?

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That will be known later in the cycle. So it probably will be I would say i would say mid-April.

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But we'll have more information when we're closer to that. I'll let you know and you can either have it mailed to you, but for time it might be better if you pick it up, but we can work on those logistics later. Adriel and

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Very happy to hear that you would like one, so I'll plan for that.

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Grace, I see your hand.

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I'm wondering if for Adriel, if it might be beneficial for her to have a copy of last year's budget.

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Hard copy since she is vice chair I don't know if that was what you were asking, Adriel, but having a hard copy from last year so you can familiarize yourself with the document.

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It was. I was going to follow up via email. Thank you, though.

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Thanks for clarifying that. I can absolutely support that, Adriel. Let me get your information over email and we'll connect you with the book.

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Caitlin, I do see your hand.

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I was actually going to ask the same question about if I might be able to have a paper copy of last year's.

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And if maybe we might be able to pick it up during the work session on Tuesday.

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Really good idea. Yes, let's plan on that for folks who are going to be there. I can set aside some copies for y'all.

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I don't see any other questions right now. My agenda planning. I was hoping to shift to our legislative update with Lisa Merrick right around seven. So we're actually right on time.

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And this is not the end of the conversation. We have more meetings and more time to to share more and support the work.

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So, Lisa, I see you're here. Thank you so much. Let's do a quick introduction.

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Yeah, thanks so much for having me. My name is Lisa Merrick. I am the government relations manager for Portland Public Schools.

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So a lot of my job right now is monitoring everything happening at the legislature.

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And I know that Michelle mentioned this earlier. We're still waiting on a lot of information around budgeting from the state. So I'll go through that in a little more detail in the next couple of slides.

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So the legislature began meeting on January 21st, 2025, and they are meeting for what is called a long session Every odd-numbered year, the legislature meets for around six months to pass a biennial budget.

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And so they began meeting in January on January 21st, and they are constitutionally required to be finished by June 28th.

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And in between those dates, there's a lot that is happening.

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In December of 2024, the governor released her recommended budget, which included the budget recommendations for the state school fund and other state agencies.

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That kind of represents the starting point of conversations with the legislature around the budget.

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And legislators can choose to meet that level of funding. They can choose to exceed that level of funding or to not meet that level of funding.

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I think it's looking like they have a lot more revenue than they anticipated and so We are hoping that they will exceed what the governor recommended.

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Um the a couple of days ago was the measure introduction deadline, which means that's when all the bills have to be filed with the chief clerk at the legislature. And so we're going to have a sense of kind of the full

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Universe of bills that will be up for consideration this session.

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And there's still other deadlines kind of outside of that. So legislators can still file bills here and there. But for the most part, we have a a really good sense of what's really good sense of what's going to be discussed. The February revenue forecast happened yesterday, so I'll share a little bit more about that shortly.

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And that revenue forecast is going to be used to inform the joint ways and means committee chair's budget framework. So we'll hear what they want to recommend that um the state school fund to get funded at and what other state agency budgets receive.

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The May revenue forecast will happen in mid-May, and that's kind of the final revenue forecast before all of the major budget bills will get.

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Scheduled and moved and that's kind of the last opportunity for legislators to get that information about art.

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Projected revenue in the state in which to make all their decisions.

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And then by June 28th or hopefully a little bit before, the legislature will adjourn.

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And they will have... We will be done having to track everything.

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And we will know. Hopefully way before then, what our state school fund is at.

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We can go to the next slide. So there's many bills. I think so far there's well over 2,000 bills that have been introduced. I haven't quite looked at the newest measure introduction, the bills that were introduced by yesterday but

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They're expecting the number of bills that have been introduced to continue to exceed previous records. So I imagine we may have up to 4,000 bills that got introduced this session. It's a lot of fun when there's no bill caps on how much legislators can introduce.

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So there are a few bills that I want to make sure you're aware of because those would definitely impact our PPS budget.

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There's several special education funding bills and funding requests. We have House Bill 2953, which would lift the cap on special education funding, which right now is at 11%.

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And as a district, we have 17% of our students that receive special education services. So lifting that cap would be really transformative.

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And bring us a lot more funding. And then House Bill 2048, it would fully fund the high cost disability account, which is what funds our students with pretty complex and high needs.

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And then we're asking for \$50 million above what the governor recommended in her budget for regional inclusive services.

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And those are services for students with low incidence complex disabilities, students who are visually impaired or deaf and hard of hearing.

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And really require significant services. And then early intervention and early childhood special education, we're asking for a \$40 million additional investment on top of what was in the governor's recommended budget.

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In total, the full ask of that package is around \$750 million.

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So it would be really, really key and really helpful to a lot of school districts if we're able to get that funded this session.

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And there is a lot of positive movement in that direction. I think legislators really are starting to understand how deeply underfunded special education is in the state.

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I think it would be hard to get the full amount that we're asking, but I do think there's a very strong chance that we'll get partway there this session.

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The other bills to know about are House Bill 3435, which is going to keep funding school meals for all.

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It will ensure that the state continues to contribute so that our school districts that qualify for the community eligibility provision can continue providing those meals at those schools and it helps our school take advantage of other federal funding.

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I think the challenge with this at the same time we're monitoring what's going on at the federal level and the possible loss of funds for school meals. I'll share a little bit more about that, but I think This bill is a good vehicle for the state to use if we do lose

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Federal funds. This is a huge priority for the state. So we're hoping to continue getting significant funding for school meals.

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The other two bills are House Bill 3039, which would be summer learning for the next two years, the state is continuing to look at how to fully fund and sustainably fund summer learning.

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Programs. Last session, the state did pass a bill and unfortunately Portland didn't qualify for that funding, but we're really pushing for a package that would allow all districts to be eligible for this funding.

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And then 3040 is the Early Literacy Initiative and that will provide us more funding to provide professional development and teachers and instructional coaches.

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To help us improve our outcomes for students around early literacy.

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And we can go to the next slide.

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Sure. And then I just wanted to make a little space if Michelle wanted to add anything.

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Add anything about any of these bills that you've provided voiceover for elisa

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Excellent. Oh, I do, actually. I'm hearing a lot of lift the cap kind of sound bites and that's only going to be useful if we have the additional funding to go with it. So if you guys on the screen tonight are doing some advocacy work

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Just add that on to the end. Of your advocacy sentence, because I think it's really going to be critical otherwise districts across Oregon are just going to be scrambling for a bigger piece of the same pie that we already have.

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That would really be my only piece here. Also, I think I really want to thank Lisa too, because she's monitoring for things that Our mandates for schools that may be unfunded And I think that's critical that if our state is

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Imposing an expectation that they thoroughly vet How much it's going to cost potentially and what we might have as a trade-off in order to accommodate that.

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I just can't thank Lisa enough for her work because i couldn't be in Salem all the time.

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Well, I appreciate that and the note about the cap on SPED funding. We definitely need the appropriate level of investment to accompany that.

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Money and I appreciate Michelle and the finance team for being available to answer questions and under very quick deadlines.

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As we keep up with the marathon and sprint of the legislative session.

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Before we go on, does anyone have questions about any of these bills?

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Do you know who's the sponsor for these bills or are they committee bills?

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Yes. So they all have different sponsors. Rep Neuron is the champion for most of the special education funding bills um i could i'd have to pull the list to remember like all the names of the co-sponsors, but she's the main

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Champion and she's the chair of the House Education Committee. And then she's also... Representative Neuron.

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I'm sorry. I'm sorry. Who did you say?

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Courtney Niran. She represents the Wilsonville area. Yeah. And then she's also championing the school meals for all bill And I will say she's also been a really good critic of unfunded mandates. She's heard that message loud and clear. So she's really kept her committee from considering a lot of bills that could

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Potentially bring more costs onto the district. And then House Bill 3039 and House Bill 3040 are both priorities of the governor's office.

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She still has some co-sponsors that are legislators, but those are really her bills.

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Looks like Caitlin has a question.

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Yeah. Hi, Lisa, by the way Thank you so much for coming to talk to us. I just wanted to ask.

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I know that this information specifically about the bills isn't in the slideshow right now, and I just wanted to ask if it would be possible for me to receive these slides after the meeting because I really want to look into them.

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Yes, they will. If you follow the link in the email I sent you, it should have the updated version.

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Lisa was just gathering some of the information that she's sharing tonight.

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Just very recently. So you're getting very, very fresh information

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Very refresh information, yes. Yeah, we can definitely make sure you get this after too.

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Okay, I guess we can go to the next slide. Also wanted to share this.

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The conversation around funding overall has been really interesting this session.

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A couple of weeks ago, the legislature, the education subcommittee of the Joint Ways and Means Committee heard a presentation from a research think tank called Edgenomics.

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And they presented What I would say is a very simplified narrative around education funding and student outcomes and they um Basically, we're encouraging lawmakers to be really cautious about investing more in education without ensuring that student outcomes will be improved. But some of the data they showed really lacked the appropriate context

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To control for some of the other factors that might have explained this.

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This relationship between more funding and education and lowered student outcomes Like the COVID pandemic, also like the schools they compared the schools they compared really were just affluent schools and lower income schools where we already kind of see discrepancies in student outcomes.

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I could go a little more into the weeds into that but it was a very simplified kind of version of what is actually going on And the American Institute of Research has also done a study on education funding And it's a lot more robust and they pulled together about six

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Studies and I've linked them in this slide, but essentially they were tasked by the legislature last session with really providing A thorough review of how the state funds education And how the state measures the quality education model, what an adequate service level would look like.

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And really what direction Oregon needs to go in order to see improved outcomes.

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And they actually found that the state needs to spend 33% more per student to really get the better, the more improved student outcomes that we're looking for.

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And in one of their reports, they encourage the state to look at a whole new funding formula with the appropriate level of investment that can really get our state to where we want to go.

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And that includes holding our state to a much higher graduation rate and improving math and reading mastery levels.

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Reducing chronic absenteeism. And just setting the bar higher for our students.

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So I definitely would urge you to read those reports if you have time. They're pretty long, but there's been some reporting in the Oregonian and I think as more people are getting up to speed on what's in them. It's been really helpful to kind of combat the narrative that Edgenomics shared earlier, which a lot of legislators were hearing from that was

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Don't find education more. And so I think it's added a new layer to the conversation and the lawmakers got this presentation on these reports last night. It was about a three-hour committee meeting.

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I'm sure they're going to do a follow-up, but I think it's Just making this conversation a little bit more dynamic and rich as we kind of look towards like longer term changes to how we fund education in the state.

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Erin, do you have a question?

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Yeah, I'm curious how that like rolls down into, again, I'm just going to be a broken record on this is As watching a teacher struggle with a classroom that is full of 35 kids And then watch two of those kids be behaviorally challenging.

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The entire classroom suffers. Hours of instruction are lost in a day.

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And if that's not solved, nothing else matters. And so I don't, how does funding translate into that solution that is should be the fundamental question that everybody is asking.

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Everything else is just bells and whistles and some some consultant making money off the side. How do we get more teachers per kid or less kids per teacher.

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Yeah, so one of the reports that the AR did was on the quality education model. And I think that's really what is proposing like a larger model that's proposing you know really important changes to education, which we do need funding for, but that would be lowered class sizes, a longer school year, more supports for students in the classroom, including supports for mental and behavioral health and like those

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Wraparound services that can help students access the classroom. I think looking at special education too, because if students are having unmet needs, they might be presenting in the classroom in a way that makes it hard for other students to access instruction at times. So I think really making sure that we're fully funding

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Special education and meeting every student at that level that they need. So I would say that continuing to work towards that model and making sure that we have the funding. That's where we're going to see the more transformative experiences for our students.

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Mariah?

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Liesl, just to say it's really nice to hear this information. I look forward to digging into it a little bit further.

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Especially since lowering class sizes Or at least increasing the number of adults in the classroom is one of this committee's recommendations, repeat recommendations.

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Although I'm just going to note when we presented our recommendations to the board, we were shot down by outgoing board member Scott.

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Director Scott. This past year who said that class sizes do not matter. So feel free to go back and reference that in the record.

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This is really important information. Thank you.

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Yeah, thank you. I think it's I think with the revenue we have this session, we're going to really work towards shoring up the resources we can serve our students better next year. But I think long term this report provides really a blueprint for the state moving forward.

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And hopefully we can look at You know, I think it is the marathon of a conversation really transforming how Oregon funds education. And it's not going to be resolved in this one session that is going to end in four months but

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I think we definitely need to keep up the advocacy and make sure lawmakers know what a priority this is.

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Any other questions about the study? And if you want to go back and watch a three hour committee It's very interesting.

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And it is available online. So I mentioned this in the slide a couple of slides back.

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The state economists presented the March revenue forecast a couple of days ago.

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And essentially, this is a new state economist. There's some really good reporting on this too. He's using a less conservative model to project what the state is collecting in revenue and Essentially, the high points to take away is that right now Oregon has an additional \$350 million to spend within the

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5 to 27 biennium. And there's even more room with potential variants that can swing up to \$500 million.

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Either way, which is a little concerning. Hopefully it's in an increased direction And then with the latest economic data, Oregon is expecting a kicker for tax filers of \$1.7 billion.

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And then the next revenue forecast is scheduled to be released in mid-May, and that will be the final revenue forecast that will inform lawmakers. Final decisions around the budget.

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I will mention, I think everyone is watching with a lot of anxiety what's happening at the federal level.

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And so... I think that does have the potential for it to take longer into the session for us to really know what we're going to get at the state school fund level and for some of these larger, more ambitious packages because

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There's a lot of concern about the loss of funding through Medicaid.

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And some of the other potential changes that are considered at the federal level that would affect what the state has available.

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To distribute after the session. I think we'll have to be patient this session as we see what happens.

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In the House and Senate. Michelle, do you want to add to that?

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I do. I want to appreciate to the forecast that we received, but I just wanted to note here for everyone on the screen that that doesn't change our current level of funding for the 2325 biennium. I'm sure you guys are aware of that

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Want you to know because we are still processing budget reductions for the current year. That doesn't mean we receive additional funds this year.

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Thank you.

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Mariah, looks like you have a question.

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So maybe not so much for you, Lisa. I am encouraged that the legislature is pursuing school lunch funding for all, especially given what might happen at the federal level.

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I just wanted to note, I think it was, was it last year that PPS just used student success funds to provide free school lunch for all?

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I guess... Oregon, just context for that. Oregon has one of the highest childhood hunger rates in the nation, so I can understand why PBS has done that.

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But it is a blanket cost for all students, regardless of whether they have need or not.

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Do you have any sense, I guess maybe Michelle or others of whether that would be that is going to be a continuing priority.

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Regardless of need.

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I think that's to be determined. I think we have a lot of competing priorities as we move into the next biennium. And so this is going to be something that we're going to have to be looking at.

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I know that we are expecting to see more information on integrated guidance, which is a more detailed accounting of our student investment account dollars.

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Coming up. So I don't have an answer for you today but I know that there is a lot of budgetary pressure right now and that that is something that will likely need to be affirmed.

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I'll just note for the committee members, if you're interested in what that budget looks like and kind of the bump in that budget.

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Based on that extension of funding. That's on page 114 of the first budget volume.

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Are there any other questions here?

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Director Sullivan?

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Yes, Michelle, you said If we get more money from the state, it won't give us more in our budget.

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Is that, did I hear that?

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Oh.

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Yeah, thank you. I was referring to the current year So even though the outlook may look better for the current biennium and at the state level and in our future, it doesn't impact our current year because the the appropriations have been set and won't be changed.

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That's right. So that money has already been given or decided.

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Yeah, yeah.

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Thank you.

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Oh, there you go. I will just share that we have a toolkit on advocacy on our website if you're interested in doing any advocacy with your legislators. we've been kind of building that up this session. We put out action alerts on critical bills for families to

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Provide testimony on if they are interested in We just have a special education advocacy day, which Director Sullivan was at yesterday.

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And we are doing a student day of action next week. So we're definitely mobilizing at the Capitol to continuously ask for more resources for schools.

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I'm going to add on here. And sorry, Lisa but everyone, all public agencies and services are really advocating hard right now under the same cost drivers and drivers concerns about federal funding that schools are. And so your voice as a parent community member

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Advocate for school is going to be really important. So I know I touched on that last meeting, but I just wanted to reaffirm that here because Everyone is in Salem right now with their handout asking for more.

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Caitlin, looks like you've got a question too.

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So I actually have a question because I am going to the Student Day of Action and I had a question about kind of like how I'm allowed to use this committee so like the information that I receive here about the future budget

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Would I be allowed to mention at all where we're making cuts or like perhaps how many positions would be changing or would that be like a breach of confidentiality? Like how much would I be allowed to share?

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In order to try to leverage more money right

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All of it. Share all of it. Anything that you're feeling passionate about. This is a public meeting.

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So Caitlin, every bit of information that you are gaining access to is at your disposal so Use it.

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Thank you so much.

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Director Sullivan.

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Director Sullivan.

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Yeah, I would just like to say, Caitlin, it's really exciting to go down there.

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And the legislators are really seeming to listen.

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Yeah, it'll be my third year going down with the DSC.

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Yeah. So you'll... You'll make a difference, definitely.

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Yes, I think the stories you can share and the concrete examples of how the funding will affect students and families next year will be really powerful to share.

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All right, we can go to the, I think it's my final slide It's less good news, unfortunately, but we are closely monitoring the House of Representatives and the Senate as they work on a budget resolution.

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It's a kind of convoluted, complicated process, but essentially both the House and the Senate pass a budget resolution, which is kind of a framework. And then they have to find they have to essentially agree on resolution one framework and then the committees within both chambers will go and determine more specifics

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Of the cuts that are kind of on the line. So the framework that passed on the House side proposes to cut Medicaid by about 10% or \$880 billion over the next 10 years, which would have significant impacts on not just our budget, but

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Budgets around the country. I know we touched on this earlier, but it would also impact school meal eligibility changes.

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It would reduce the number of schools that would qualify for the community eligibility provision.

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And it also requires 100% of applicants to provide income verification documentation. So it would add a barrier.

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To students being able to access those meals The latest data I collected or I had heard back from our school nutrition services was that it would make it so only 16 of our sites would be eligible.

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For that community eligibility provision. And then the other proposed cuts is to education funding in Title I and across all title funds.

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So it would be a 25% cut to Title I and then cuts to all Title II and Title III programs.

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And Congress is still considering block grants, which is kind of a way to reduce funding as well. And it combines multiple education programs into one pot of funding.

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And then it offsets the responsibility of that funding from one agency to another.

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I think their long-term goal is to put more of the onus of funding the title funds onto the states.

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And as we know here, Oregon is underfunding education right now.

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They're not going to be able to come up with the money that we would lose at the federal level.

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The vote in the House passed by 217 to 215, so it's very close. Our board and superintendent sent a letter to our congressional delegation urging them to vote no on this. We're continuing to share the impacts of this budget resolution.

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With our representatives and we're working with other districts in other parts of the state that have Republican members who represent them.

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Or one Republican member in Oregon so We're just continuing to do all we can to make sure we're advocating for maintaining the federal funds that we do have.

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Any questions about the federal resolution?

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All right, not a fun note to end the committee on.

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I should have started with that first.

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Thank you for your time so much, Lisa. I appreciate that you would spend your evening with us here and we're just a little bit over our end time. So look out for the email from me from our March 4th

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Board work session, that's the next time we'll see each other

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Yeah, I want to just thank you to Lisa and Michelle and uh Tammy, for joining us tonight. I really appreciate the staff time and Juno and others as well for joining us. I really know that it's a lift to be at all these meetings.

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And to provide this engagement. You know, we really want to provide you with good community feedback to the board and to the superintendent. So thank you so very much for this tonight.

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And with that, our meeting is adjourned.

Submitted by:
Alexandra Martin
Finance Program Manager