TO: Board of Directors

FROM: George Russell
Superintendent of Schools

RE: Reports and Recommendations

REGULAR BOARD MEETING

III. INTRODUCTION OF GUESTS AND SUPERINTENDENT’S REPORT

1. Student Board Representative Recognition

Superintendent Russell will present the following student board representatives with certificates of appreciation for their service to the district this year:

   Natalie Harrison, Churchill High School
   Zach Schneider-Lynch, IHS, All Campuses
   Vivek Patel, North Eugene High School
   Katie Melton, Sheldon High School
   Noah Henry-Darwish, South Eugene High School

VII. ITEMS FOR INFORMATION

1. Receive an Update on HomeSource (Staff: Tom Henry)

On September 5, 2007, the board approved a revision to Alternative Education Programs policy IGBHA making an exception for home school students to attend HomeSource in compliance with interpretations of HB 2040. The policy change gave consent for a home school student to enroll in HomeSource and the Bethel School District, if required by Chapter 846 Oregon Law, without first evaluating the student to determine whether the student’s education needs could be served within district schools and programs. The board requested that staff bring back the policy for further discussion if information or interpretations of HB 2040 were clarified or changed in the writing of statutes or guidelines by the Oregon Department of Education.

Two elements of HB 2040 have been clarified that have implications for Policy IGBHA and our current practice for releasing students to Bethel and HomeSource.

These clarifications are based on the Oregon Department of Education Memo # 011-2007-08 and ORS 336.668 to 336.675. The Oregon Administrative Rules have not yet been written and are expected to be completed in August 2008.

• Both Eugene 4J and Bethel 52 are qualified districts to contract with HomeSource, rather than just the Bethel School District. Our current practice is to release
students to Bethel that attend HomeSource rather than contract directly with Homesource. Eugene could choose to contract directly with HomeSource rather than release 4J students to Bethel to attend HomeSource. Staff does not believe that it would be cost effective to change this practice.

- While we are required by statute to place a child in HomeSource if they were enrolled prior to July 1, 2007, it is now clear that we are not required to place a student with HomeSource upon request from a parent if the student was not enrolled in HomeSource prior to July 1, 2007. Nor, are we required to do an assessment of a student to determine whether the student would benefit from our district programs and whether HomeSource would meet the child's educational needs and interests.

Our current practice is to refer new students upon parent request to Bethel and HomeSource and not do an individual student assessment. The current policy seems to require that to continue the practice of referring students upon parent request without an assessment, we will need to revise Policy IGBHA.

Based on these clarifications, there are three options for the future:

1. Continue the current process of referring homeschool students to HomeSource upon a parent’s request and without doing an individual student assessment. This would require a revision to policy IGBHA to exempt homeschool students from the policy requirements.

2. Decide to discontinue the practice of referring new homeschool students (those not enrolled prior to July 1, 2007) to HomeSource. Existing policy language would be maintained.

3. Consider requests for new homeschool students to attend HomeSource, but assess whether the student would benefit from district programs and whether HomeSource would meet the child's educational needs and interests, as we do with students who might be referred to any other alternative education program. Existing policy language would be maintained.

Copies of Policy IGBHA and Oregon Department of Education Memo # 011-2007-08 are included in your board packet.

VIII. ITEMS FOR ACTION AT THIS MEETING

1. **Approve the Modified Trimester Calendar** (Staff: Sara Cramer)

   A trimester calendar is being submitted for approval as an option for middle level schools. The trimester calendar allows for more electives to be offered during a school year. This is being proposed due to the declining enrollment and the need for more flexibility in scheduling electives. Middle level is a time for exploration. A trimester can provide more electives for a student and allow a chance for more exploration. A trimester can more easily fit the new physical education requirement into a student's schedule.

   Middle level schools interested in changing to the trimester schedule would need to process it with their staff and parent organization. The proposed calendar is closely
aligned with the semester calendar. As the high school calendar has some release days that the elementary calendar does not, this calendar has two days that are not coordinated with the semester calendar.

The superintendent recommends approval of the modified trimester calendar. A copy of the proposed modified trimester calendar is included in your board packet.

IX. CONSENT GROUP – ITEMS FOR ACTION

1. **Award Contract for the Management of the Nutrition Services Program** (Staff: Caroline Passerotti)

Proposals to provide management services for the district’s nutrition services program were opened December 13, 2007. Information requested of proposers included their proposed meal programs and marketing plan, management team and depth of management support, experience with similar sized school districts, and financial projections.

Responses were received from Sodexho America, LLC, a Delaware corporation; and Compass Group, N.A., Inc., by and through its Chartwells Division, headquartered in North Carolina.

A twelve-member selection committee comprised of food services staff, building principals, classified employee representatives, and human resources and financial services staff reviewed the proposals and selected both firms for finalist interviews. Committee members evaluated proposals and assigned points to each criterion specified in the request for proposals. The finalists received the following number of weighted-average points out of a total of 100 possible points:

<table>
<thead>
<tr>
<th>Company</th>
<th>Points</th>
</tr>
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<tbody>
<tr>
<td>Sodexho</td>
<td>88.4</td>
</tr>
<tr>
<td>Chartwells</td>
<td>71.8</td>
</tr>
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</table>

Selection committee members consistently ranked Sodexho over Chartwells in their evaluations. Responses in which the Sodexho team distinguished itself included their proposed resident director, projected financial statements, and quality and variety of sample menus. Both building-based and central staff have been pleased with Sodexho’s performance in the last five years.

Proposed fees represent the equivalent of a .5% increase over fees paid in 2007-08. Under the new contract, future year increases will grow by the rate of the Consumer Price Index (U.S. Urban) or 3%, whichever is greater.

The superintendent recommends contracting with Sodexho America, LLC, to provide nutrition service management services for 2008-09, with four possible extensions.

2. **Approve Resolution #3, Making Appropriations Resulting from Transfers** (Staff: Susan Fahey)

Unanticipated program expenditures have resulted in requests for transfers from the Contingency budgets totaling $1,535,054. Requests include budget increases for special education program costs, compensation increases for custodians and bus
drivers, project costs related to the *Shaping 4J’s Future* process, fuel and utility costs, and other unforeseen costs.

The requests for transfers are as follows:

a. **Special Education Contingency - $665,000**  
   This transaction reappropriates special education contingency funds ($500,000 from the adopted budget and $165,000 from 2005-06 high cost disability funds added in the first supplemental budget) to offset the rising costs of delivering special education services. Factors behind the cost increases include a greater number of students requiring additional staff support, particularly behavior, autism and Life Skills programs and one-on-one assistance.

b. **Wage Increases for Custodians and Bus Drivers - $229,887**  
   On April 2, 2008, the reclassification of certain custodian, bus driver and related transportation positions to establish competitive market compensation was approved. Funds are requested to pay for wage increases.

c. **Shaping 4J’s Future - $175,000**  
   Funds are reappropriated to support the district’s strategic planning process, *Shaping 4J’s Future*. Costs include University of Oregon facilitation, consulting and survey expenses.

d. **Fuel and Utility Costs - $279,200**  
   Due to rate and utilization increases, funds are needed to cover higher fuel and utility costs for district facilities:

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<th>Cost</th>
<th>Amount</th>
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</thead>
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<td>Fuel</td>
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<tr>
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</tr>
<tr>
<td>Garbage (rate only)</td>
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</table>

e. **Fuel Costs - $74,628**  
   Fuel costs for district vehicles have risen due to the significant increase in the price of both diesel fuel and unleaded gasoline. The state will reimburse 70% of $56,923 in costs to transport students to and from home. The net cost to the district is expected to be $34,782.

f. **Tripod Project - $35,548**  
   Last year, the district conducted a survey of high school students to inform efforts to improve student achievement. The survey was developed by the Tripod Project, which provides the survey, analyzes results and provides reports to schools and to teachers. School staffs have used the results to improve learning conditions at schools. Funds are requested to continue the Tripod Project in district high schools this spring.

g. **Website Development - $35,000**  
   During 2006-07, the district contracted for the development of a new district website to replace its outdated web presence. Development has continued throughout the 2007-08 year and will continue into 2008-09. CIS department funds have supported this work to date, but the total cost during 2007-08 is greater than existing budgets.
allowed. Funds will be transferred to cover the department budget shortfall for work performed this fiscal year.

h. Coburg Elementary Custodian - $11,378
Funds are requested to cover the current level of custodial staffing at Coburg Elementary School. The budget provides for 1.0 FTE from a combination of district funds and Coburg community contributions. Funds pay for an additional .469 FTE.

i. Highly Qualified Teacher Test Preparation - $10,573
To comply with the No Child Left Behind Act and assist district teachers in meeting the highly qualified teacher standards, the district is providing support for staff who need to take exams in areas they are currently teaching.

j. Facilities Work Order System - $10,440
In conjunction with the planned replacement of the district’s computer systems, the Facilities Management department has upgraded its work order system. Funds are requested to pay maintenance fees required by the new system.

k. Generator Service - $8,400
This transaction transfers funds to pay the annual cost of required inspections, testing and reporting no longer covered by warranty for emergency generators installed at ten sites over the last three years.

If these requests are approved, the balance in the Contingency account would be $1,565,226.

The superintendent recommends adoption of Resolution #3 making appropriations resulting from transfers.

3. Approve Grant Application: ODE Quality Improvement Grant (Staff: Laurie Moses)
Staff from Churchill High School submitted a $9,999 grant application to the Oregon Department of Education. The grant will support making quality improvements to the school-based Teen Parent and Child Development Center Program through increased professional development and staff training.

The superintendent recommends approval of the grant application. A copy of the grant description form is included in the board packet. A copy of Resolution #3 is included in your board packet.

4. Approve Grant Application: Best for Kids and Families 2 (Staff: Tom Henry)
Staff from the Instruction Department submitted a $502,772 grant application to the Oregon Department of Education. The project will expand and enhance after school programs at three elementary schools, one middle school, and one K-8 school. These schools have the highest poverty levels and academic needs in Eugene. Elementary programs will add needed math classes and recreation provided by the City of Eugene and middle level programs will add certified teacher time and trained math tutors.

The superintendent recommends approval of the grant application. A copy of the grant description form is included in the board packet.
5. **Approve Grant Applications: Oregon Small Schools Initiative Extension** (Staff: Laurie Moses)

Staffs from the three small schools at North Eugene High School (Academy of Arts, North IHS, and The School of IDEAS) have each submitted an application for a two-year extension of the assistance and funding received from the Oregon Small Schools Initiative. The grant aims to refine the structure and culture of the small school and to enact policies and practices that support it in becoming a high achieving and equitable high school.

The superintendent recommends approval of the grant applications. Copies of the grant description forms will be provided at the board meeting.

**X. ITEMS FOR ACTION AT A FUTURE MEETING**

1. **Approve Revisions to Policy JECC, School Choice** (Staff: Barb Bellamy)

   Board policy JECC School Choice specifies the application process and enrollment priorities that are used when a parent wishes to send a student to an alternative school or a neighborhood school outside of their attendance boundary. The policy specifies that, to be considered in the school choice lottery, applications must be submitted by the first Friday in March. Staff is proposing that this date be changed to the Friday preceding spring break, which would typically allow an additional two weeks for applications to be accepted before the lottery is conducted.

   In June 2007, the board approved a similar time line for the 2008 school choice application and lottery process. The exception was made on a one-time basis, in recognition of the possibility that board decisions made as part of *Shaping 4J's Future* might result in re-location of some alternative schools, school consolidations or other changes to school attendance areas or enrollment priorities.

   Staff is recommending that this one-time extension of the school choice application period continue and that the Friday preceding spring break in March become the deadline for a school choice application to be considered in the lottery. A minor revision in wording is also recommended to more clearly state the process that is used when applications are received after the lottery.

   A copy of the proposed policy with revisions is included in your packet. The superintendent will recommend approval of the board policy JECC School Choice, as revised.

2. **Schedule a Local Option Tax Levy for November 4, 2008** (Staff: Caroline Passerotti)

   On February 25, 2008, the budget committee voted to recommend that the board place a five-year renewal levy at the current rate of $1.50 per $1,000 assessed valuation on the November 4, 2008, ballot to maintain current school programs and staffing levels to the extent possible. If approved, the renewal levy would become effective June 2010 after the expiration of the current levy.
Background

In May 2000, district voters approved a five-year local option levy of $1.50 per $1,000 of assessed property value to maintain school programs and staffing levels to the extent possible. The levy, which passed with a 63.7% “yes” vote, generated an average of $5.8 million per year and expired at the end of 2004-05.

A five-year renewal of that levy was approved with a 72% “yes” vote in November 2004. This levy, which expires after 2009-10, is projected to generate $13.4 million this year and reach $14.2 million in 2008-09. Proceeds represent about 10% of general fund revenue and the equivalent of about 160 full-time teachers.

The ability to levy local option taxes was extended to school districts by the 1999 state legislature. This created district voters’ only opportunity to increase revenue for district operations since Measure 5 was passed in 1990. Local option taxes can be levied to support operations (five year limit) or pay for capital improvements (ten year limit). Most significantly, proceeds are excluded from the State School Fund formula, permitting districts to retain all funds generated. Local option elections are subject to “double majority” voter approval, except for general elections held in November of even-numbered years.

State law limits the amount of money a school district can raise from a local option levy. These limits were revised most recently by the 2007 legislature and include the following:

- Measure 5 limit – revenue actually received by the district from local option taxes imposed;
- Percentage of state resources – 20% of the combined total of the state general purpose grant, transportation grant, facility grant and high cost disability grant; and
- Dollars per student – $1,000 per average daily membership, weighted (ADMw), growing by 3% per year beginning 2008-09.

The Measure 5 limit represents the total of all “tax gaps” for all individual properties in the district. The “tax gap” is the difference between the Measure 5 tax on a property and the Measure 50 tax on the same property. Each property has its own unique tax gap, which changes year to year and varies in relation to other similar properties depending upon the growth dynamics of real market and assessed property values.

Annual revenues are difficult to predict and will vary year-to-year because Measure 5 limits affect each property differently. Not every property will be assessed a local option tax, and some properties will be assessed more than others. If real market values grow at a slower rate than assessed values, tax gaps will be reduced and local option revenue may be lower.

Proposed Renewal

Earlier this year, the district contracted with Western Financial Associates, a financial advisory firm in Portland, to estimate local option levy proceeds for the renewal period. We examined the potential benefit of higher tax rates within the limits of the three statutory tests described above. The Measure 5 limit for proceeds generated by a tax rate of $1.50 per $1,000 of assessed value was $15 million; the 20% of state resources limit was projected to be $15.3 million. Since the district would be unable to benefit from taxes collected in excess of that limit, $1.50 was confirmed to be the optimum rate.
Projected local option revenues are based on the following assumptions:

- Real market and assessed property values grow at the same rate, by 4.5% in 2008-09 and 3.5% in future years; and
- Tax collections average 94.5% in all years.

Under these assumptions, revenue from the renewal levy is expected to be:

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenue</th>
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<tbody>
<tr>
<td>2010-11</td>
<td>$14,945,000</td>
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<td>2011-12</td>
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<td>2012-13</td>
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<td>2013-14</td>
<td>$16,570,000</td>
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<tr>
<td>2014-15</td>
<td>$17,150,000</td>
</tr>
</tbody>
</table>

Receipts will vary depending upon actual growth in real market and assessed values on a property-by-property basis.

The average tax rate for all properties in 2010-11 is projected to be $1.45, including:
- $1.48 for residential properties,
- $1.45 for commercial properties,
- $1.10 for industrial properties.

The average local option tax is projected to be $301, ranging from $121 for farm properties to $925 for commercial properties and $1,360 for multi-family properties.

**Election Timing**

Possible election dates for the renewal of the local option levy range from November 2008 through May 2010. The “double majority” applies to all elections except November 2008, unless House Joint Resolution 15 is approved by voters in November 2008. This resolution would allow May and November elections in any year to be exempt from “double majority” requirements. If it does not pass, the number of voters required to approve a “double majority” election is expected to increase due to the high voter turnout anticipated in November 2008.

**Recommendation**

The superintendent recommends that the board adopt a resolution calling for an election to renew a five-year local option tax levy at the rate of $1.50 per $1,000 of assessed valuation to finance district operations and pay all related, incidental costs.

Copies of the resolution calling for the election and the Notice of District Measure Election are included in your packet.

3. **Approve Supplemental Budget #2**  (Staff: Susan Fahey)

   According to Oregon Local Budget Law, the school district can amend its budget by 1) transferring spending authority within a specific fund or from the General Fund to another fund; or 2) changing spending authority by adoption of a supplemental budget. Changing spending authority requires the board to receive the information as a future action item, while transfers may be approved as consent items.

   **Proposed Supplemental Budget Transactions**

   You are scheduled to adopt a supplemental budget at your June 4, 2008 meeting. Transactions are proposed to reappropriate beginning working capital and recognize revenue not anticipated at the time the budget was developed. An overview of the
transactions is presented below, and a list of specific transactions will be provided at the board meeting.

**General Fund**

**Reconciliation of Beginning Working Capital**
When the 2007-08 budget was developed, staff projected a beginning fund balance of $18,904,578. The actual beginning fund balance was $20,845,607. Of the $1,941,029 difference, $779,360 was reappropriated in Supplemental Budget #1 to complete specific projects begun but not finalized in 2006-07. The $1,161,669 difference represents PERS savings from the financing of the district's PERS unfunded actuarial liability. The supplemental budget transfers $350,000 of this amount to the Fleet and Equipment Fund and remaining amounts to the ending fund balance.

The following transactions are proposed to recognize the increase in Working Capital:

**Resources (Increased Working Capital) - $1,161,669**

**Requirements:**

a. **PERS Savings - $350,000**
   In 2003-04, staff calculated an annual requirement of $2 million to cover the costs of the highest priority textbook and equipment needs. At that time, the superintendent recommended a funding strategy that set an annual budget target of $2 million per year for equipment and textbooks and budgeted a $1.65 million (plus inflation) transfer from the general fund to the Fleet and Equipment Fund, with the intent of using “excess ending working capital” (actual versus budgeted) to increase the transfer by up to $350,000. To support textbook adoptions scheduled for 2008-09, $350,000 of PERS savings is added to the transfer appropriation.

b. **Unappropriated Ending Fund Balance - $811,669**
   District reserves are increased by the amount of the balance of PERS savings.

**Total Requirements - $1,161,669**

**Recognition of New Revenue**
The following proposed transactions recognize new revenue and appropriate the same amount:

**Resources - $469,668**

**Requirements:**

a. **High Cost Disability Grant Revenue - $251,297**
   The state legislature has recognized the issue of high cost students and earmarked several million annually to help districts offset per student costs in excess of $30,000. The Oregon Department of Education estimates that the district will receive 2007-08 high cost disability grant proceeds $251,297 above amounts previously anticipated. Funds are appropriated for services provided to the district’s increasing number of high needs students.
b. **Tuition Reimbursement - $60,000**
   This transaction recognizes tuition revenue from Bethel School District for students attending the Bailey Hill Instruction Center and appropriates the funds to High School Services.

c. **Charter School IEP Services - $53,262**
   Under contract with other school districts, the district provides special education services to out-of-district IEP students who attend district-sponsored charter schools. This transaction recognizes payments from seven area school districts and appropriates funds to pay for special education staffing costs.

d. **Transportation Reimbursement - $37,341**
   This transaction recognizes 70% reimbursement revenue from the State of Oregon for transportation costs incurred by the Instruction Department for taxi services for students to the Bailey Hill Instruction Center Alternative Education Program. Funds are appropriated accordingly.

e. **High School Summer Program Fees - $32,000**
   This transaction recognizes and appropriates funds received for the 2007 high school summer session and appropriates a like amount to High School Services to cover a portion of the summer program expenses.

f. **Advertising Revenue - $18,750**
   This transaction recognizes additional revenue from the sale of advertising in the school calendar and increases the Communication Department’s appropriation by the same amount.

g. **Nursing Services Program Revenue - $15,000**
   This transaction recognizes revenue from two contracts: 1) $8,000 from the Bethel School District for School Based Health Center services and 2) $7,000 from Lane Education Services District for nursing services for its Life Skills Program. A like amount is appropriated to Nursing Services.

h. **Middle School Mentor Program Revenue - $2,018**
   This transaction recognizes donations received to support the services provided by mentors volunteering in district middle schools.

**Total Requirements - $469,668**

**Fleet and Equipment Fund**

**Recognition of New Revenue - $350,000**
This transaction recognizes the $350,000 in 2006-07 PERS savings transferred from the general fund, as described above, and appropriates the same amount.

**Recommendation**
At your June 4, 2008 meeting, the superintendent will recommend approval of a resolution adopting the supplemental budget as presented, or as modified as a result of board discussion. A draft resolution adopting the supplemental budget is included in your board packet and a summary of the transactions will be provided at the board meeting.
4. **Approve the Superintendent’s Recommendations Regarding the Follow-Up Steps Related to Consideration of a Chinese (Mandarin) Language Immersion School in the Churchill Region and a Dual-Language Spanish Immersion at River Road/Camino del Río**

**BACKGROUND**

Staff has been exploring concepts for two new language immersion programs, a Chinese (Mandarin) immersion program and a Spanish dual language immersion program. On May 7, 2008 a board work session was held to update the board on the work to date and to identify questions and issues that need to be addressed.

At the May 21 meeting, the superintendent will present his response to the questions and issues raised at the work session and his recommendations regarding the process and time line for further work.

**Chinese Mandarin Language Immersion Program**

In spring 2006, a group of community members requested that the district consider establishing a Chinese immersion program. The district applied for and received funding to explore the concept as part of a three-year Foreign Language Assistance Program (FLAP) grant. The first step was to conduct a feasibility study to determine community interest. Results of the Chinese Immersion Feasibility study were presented to the board on June 20, 2007. Following the presentation, the board agreed that staff should proceed in creating a design for a Chinese immersion program. During the 2007-2008 school year, Abby Lane and Carl Falsgraf from the UO met with experts and practitioners in the field of language immersion to gather the information necessary to develop a Chinese immersion program model, draft some initial recommendations regarding how and when a Chinese Immersion program might be started, and how issues such as staffing, student enrollment and diversity, and program support might be addressed. The program model and recommendations were presented at the work session on May 7, 2008 by Abby Lane, ELL Coordinator, and Yvonne Curtis, Director of Student Achievement.

In the Shaping 4J Recommendation regarding Adams Elementary School, I suggested that the school community explore program alteration options which might include a dual language Spanish immersion with cluster services for English Language Learners or a Chinese Immersion school and implement new program option beginning in 2009-10. Plans have been put into motion to ascertain the preferences and priorities of the staff, parents and community related to alterations of the Adams program that could increase the enrollment of the school. A survey will be conducted in June of catchment area parents and preschool parents regarding their preferences and will also inquire as to their support of converting to a Chinese immersion school. The board and staff to this point have, as have community advocates, identified a strong desire to have any new language immersion program located in the Churchill region as it is the only region without an existing language immersion program. One of the questions to be answered is if a Chinese immersion program is not located at Adams where else in the Churchill region can it be located? Or, is the board willing to consider a location at another elementary school outside the Churchill region?
Spanish Dual Language Immersion Program

In the fall of 2005, River Road Elementary, was designated as an Academy School and directed to redesign the school with a particular focus. At the time one of the A&O recommendations was to support neighborhood schools to develop distinctive programs or structures that would address the needs of their student bodies, improve school performance and address the achievement gap, and help mitigate the impacts of alternative schools and open enrollment on their school. One of the strategies suggested included consideration of a dual immersion program.

The school team at River Road/Camino del Rio explored the possibility of becoming a Spanish dual language immersion program. They visited schools to learn about the best design for such a program, and they studied their school demographics and enrollment patterns. At that time, the team determined that they did not yet have enough native Spanish-speaking students to make the dual-immersion model work. In the Shaping 4Js Future process, one of my recommendations for Adams was to explore the possibility of an ELL cluster or Spanish dual language program. Instruction and ELL staff met to determine the elements necessary to ensure a viable Spanish dual language program in this district. The program design and the necessary elements were presented to the board at the work session on May 7, 2008, with staff supporting the establishment of a Spanish dual-language immersion program at River Road/Camino del Rio.

DISCUSSION

While both of these programs involve language immersion, they are essentially different in form and substance, as well as purpose and intent, and therefore should be considered separately. However, there are some general issues and questions that apply to both that must be considered before focusing on the specifics related to each.

Alternative School?

One of the fundamental questions to be answered is whether one or both are proposing to be an alternative school and therefore are subject to the board’s policy related to starting or converting to an alternative school. Board policy IGBH Alternative Schools states:

An alternative school is defined as any complete educational program that represents a distinctive strategy within the district for achieving the educational goals defined in the school board’s philosophy statement and in the program goals and objectives of the district's required curriculum. The term “complete educational program” is used herein to mean a school that has an organizational structure, a teaching staff, a budget, and a specific curriculum, each of which is separate from other schools. An alternative school may share the facilities, administrative personnel, and the support services of another school, or may be an autonomous unit. An alternative school may differ from other schools in ways that include, but are not limited to, the following:

1. The school may emphasize a specific element of the district's approved curriculum;
2. The school may present the district's approved curriculum in a sequence different than from the order of presentation in other schools;
3. The decision-making process for governance of the school may differ from the processes used in other schools;

4. Students may be grouped for instruction in some unique manner;

5. The teachers in the school may emphasize a specific instructional strategy.

Board Policy IGBH also provides that the board will determine whether to approve a proposed alternative school after considering the superintendent's recommendation and the report of the district curriculum council (which no longer exists), and provides the following criteria to be used in evaluating the proposal:

1. The school must be an alternative school as defined by policy;
2. There must be evidence of sufficient interest among staff, parents, and students to warrant establishment of the school;
3. The planned curriculum must conform to the district's educational goals and objectives and the required district curriculum;
4. The operational plan, including staffing, proposed location of the school and facility requirements, support services needed, and the proposed timelines for establishing the school, must conform to applicable district policies and constitute an efficient use of district resources;
5. There must be evidence that establishment of the proposed school enhances the district's educational program;
6. The proposed budget for the school must be appropriate to the program that is proposed and must represent an efficient use of district funds. Budget request may include start-up costs to be paid by District 4J or to be solicited from other sources. “Start-up costs” are herein defined as those expenditures necessary to begin a new school, but which will not continue after the school becomes fully operational. Start-up costs may include, but are not necessarily limited to, such items as purchase and/or renovation of facilities, purchase of an initial inventory of equipment and supplies, and payroll and travel expenses for program planning and in-service of staff. Other than start-up costs approved for payment out of district funds, the district-supported budget for an alternative school shall not exceed the district per-pupil cost of educating students unless an express waiver is approved by the Board of Directors;
7. The proposed criteria for selecting students for enrollment in the alternative school must not unfairly discriminate among applicants and must be reasonably related to the educational goals of the school and the district.

The policy further provides that:
Any students in School District 4J may apply for enrollment in an alternative school; the location of students' residences within the district shall not be a factor in evaluating applications for enrollment. Applicants will be evaluated for acceptance according to the student selection criteria approved by the board as part of the proposal for establishment of the alternative school.

The most recent change to the Alternative School policy added the provision for alternative schools review to ensure that alternative schools continue to meet board and district goals, and perform consistent with the board policy and expectations. As a result of the alternative school reviews, the board and superintendent determined that co-location of alternative schools with neighborhood schools was no longer desirable. The
district is taking steps to merge or uncouple alternative and neighborhood schools, and where appropriate, co-locate alternative schools/programs together. No other substantive changes were made to policy IGBH, however policy JECC on School Choice has been amended with respect to the lottery to provide the following:

- The board may establish attendance area priorities for students who reside in an attendance area to manage student enrollment.
- Priority will be given to students who qualify for free and reduced meals, and are applying to elementary schools that are below the district average for free or reduced meals. This priority will take place on an alternating bases.

Since 2001, we have addressed alternative schools and school choice on several fronts, with the most recent being as part of the Shaping 4J process. My review of the policy indicates it is time to update it to conform with the new policy directions and goals established by the board and to accurately reflect current practices.

**Shaping 4J’s Future: Core Values, Goals and Principles**

As part of the recently completed Shaping 4J’s Future process, the board coalesced around some core values, goals and principles that should be considered in determining whether to move ahead with accepting proposals to establish new or different choices available to students. The core value around “choice” provides the following:

- School choice provides all students with equal access to educational options that are appropriate to their needs and interests, and involves, in concept, the educational purposes that promote innovation and academic achievement.
- School choice should support excellence and equity, promote diversity within our schools, and support district efforts to close the achievement gaps.
- School choice should not result in a system of segregated schools or negatively impact the education of lower income students.

Any proposal to establish a new alternative school should be measured against these standards in order to receive further consideration and they should drive the design of any new school choice programs.

**School Choice/Open Enrollment**

In addition to the alternative school opportunities available within the district, we also have an open enrollment policy, policy JECC School Choice. The district’s open enrollment policy goes back to the early 70’s as well. It provides that parents may request that a student be permitted to transfer to a school outside the attendance area wherein the student’s parents reside. Requests for enrollment in another district neighborhood school are honored unless the receiving school has reached its enrollment capacity. As part of the Shaping 4J decisions, the board has decided to place some limitations on open enrollment transfers between regions to ensure better balance among middle and high schools. This decision has not been applied to the elementary level. Along with alternative schools, open enrollment provided the public school choice options available to parents in the district until the advent of charter schools several years ago. While the alternative schools are the main attractors for
which parents initiate choice, there are several neighborhood schools, generally of higher SES, that draw significant numbers of students away from other neighborhood schools as well.

Impact on Neighborhood Schools

As the district has experienced reduced resources and declining enrollment, the impact on the ability of all schools to provide strong instructional programs has been tested. Over the past five years a number of elementary schools have been closed or consolidated as enrollments have continued to dwindle (Santa Clara, Whiteaker, Bailey Hill, Willakenzie, Westmoreland, Patterson and Willard). Three alternative schools have been closed as well (Hillside, Magnet Arts and Evergreen). As neighborhood schools have seen their enrollments decline, they have become more concerned about the impact of losing their neighborhood students to alternative schools, charter schools or other neighborhood schools through open enrollment. As the data in the following chart shows, some neighborhood schools have been more dramatically impacted than have others by school choice/open enrollment.

### Table 1: Transfer Data 03-04 vs (07-08)

<table>
<thead>
<tr>
<th>Neighborhood School</th>
<th>Total Within Boundary</th>
<th>03-04 (07-08) Enrollment</th>
<th>Transfers Out 03-04 (07-08)</th>
<th>Transfers In 03-04 (07-08)</th>
<th>% Attending from Within Boundary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adams</td>
<td>440 (496)</td>
<td>167 (197)</td>
<td>312 (353)</td>
<td>40 (50)</td>
<td>29% (29%)</td>
</tr>
<tr>
<td>Awbrey Park</td>
<td>624 (636)</td>
<td>476 (451)</td>
<td>171 (222)</td>
<td>38 (28)</td>
<td>70% (65%)</td>
</tr>
<tr>
<td>Chavez</td>
<td>502 (610)</td>
<td>385 (370)</td>
<td>165 (304)</td>
<td>53 (62)</td>
<td>66% (50%)</td>
</tr>
<tr>
<td>Coburg</td>
<td>139 (169)</td>
<td>138 (151)</td>
<td>22 (32)</td>
<td>7 (14)</td>
<td>94% (81%)</td>
</tr>
<tr>
<td>Crest Drive</td>
<td>233 (201)</td>
<td>221 (258)</td>
<td>72 (67)</td>
<td>88 (124)</td>
<td>57% (67%)</td>
</tr>
<tr>
<td>Edgewood</td>
<td>374 (389)</td>
<td>246 (320)</td>
<td>170 (143)</td>
<td>57 (72)</td>
<td>50% (63%)</td>
</tr>
<tr>
<td>Edison</td>
<td>264 (264)</td>
<td>315 (330)</td>
<td>85 (50)</td>
<td>100 (116)</td>
<td>81% (81%)</td>
</tr>
<tr>
<td>Gilham</td>
<td>481 (577)</td>
<td>496 (523)</td>
<td>59 (118)</td>
<td>99 (58)</td>
<td>82% (80%)</td>
</tr>
<tr>
<td>Harris</td>
<td>297 296)</td>
<td>209 (175)</td>
<td>137 (165)</td>
<td>67 (41)</td>
<td>48% (44%)</td>
</tr>
<tr>
<td>Holt</td>
<td>791 (641)</td>
<td>620 (531)</td>
<td>100 (167)</td>
<td>33 (49)</td>
<td>74% (74%)</td>
</tr>
<tr>
<td>Howard</td>
<td>502 (490)</td>
<td>333 (294)</td>
<td>228 (241)</td>
<td>38 (35)</td>
<td>59% (51%)</td>
</tr>
<tr>
<td>McCormack</td>
<td>504 (425)</td>
<td>445 (402)</td>
<td>120 (103)</td>
<td>61 (77)</td>
<td>76% (76%)</td>
</tr>
<tr>
<td>Meadowlark</td>
<td>262 (335)</td>
<td>195 (245)</td>
<td>110 (139)</td>
<td>29 (47)</td>
<td>63% (58%)</td>
</tr>
<tr>
<td>Parker</td>
<td>298 (352)</td>
<td>221 (264)</td>
<td>161 (165)</td>
<td>43 (75)</td>
<td>60% (53%)</td>
</tr>
<tr>
<td>River Road</td>
<td>515 (492)</td>
<td>310 (315)</td>
<td>139 (255)</td>
<td>46 (73)</td>
<td>51% (48%)</td>
</tr>
<tr>
<td>Spring Creek</td>
<td>457 (461)</td>
<td>420 (387)</td>
<td>115 (137)</td>
<td>92 (58)</td>
<td>72% (70%)</td>
</tr>
<tr>
<td>Twin Oaks</td>
<td>304 (301)</td>
<td>246 (240)</td>
<td>88 (84)</td>
<td>30 (22)</td>
<td>71% (72%)</td>
</tr>
<tr>
<td>Willagillespie</td>
<td>345 (442)</td>
<td>312 (369)</td>
<td>106 (125)</td>
<td>40 (48)</td>
<td>79% (72%)</td>
</tr>
</tbody>
</table>

Meanwhile, most alternative school enrollments have remained relatively stable, which has allowed them to predict enrollment, and maintain staffing, and provide for class sizes that are more stable.
Transportation

There are two issues with transportation associated with choice of schools: who should pay for it? And, how can the cost be kept reasonable?

The A&O report stated that to “provide a choice of public schools as a deliberate policy decision without providing free transportation can only lead to unequal opportunities for children based upon the ability of their parents to get them to school at their own expense”. The Access & Options Committee recognized this fact, but struggled with the question of the cost and practicality of broad-based transportation options. The A&O survey of parents further confused the issue around transportation when so few parents said that if it was provided they would use it.

At present, no transportation is provided to alternative schools. This means that, by and large, more affluent parents can drive their children, or find car pools, etc, to get their kids to alternative schools, while less affluent parents often cannot. Therefore, some argue that school choice that doesn’t facilitate transportation for those who need it restricts access and does not provide equitable choice.

Our A&O school surveys presented us with a paradox: A majority of our parents said that transportation should be provided to parents who needed it to send their children to alternative schools; however, an even larger majority said that if transportation was provided, they wouldn’t use it.

Most families appear to exercise choice to schools in or near their neighborhood. The data indicates that most transfers occur to schools within or adjacent to the neighborhood region, so transportation could, perhaps, be relatively contained. However, undoubtedly some parents would send their kids to a school outside their neighborhood if transportation were provided.

In the Shaping 4J Report, the recommendation on transportation provided that we study the possibility of adding transportation to all elementary schools within each region, including the possibility of providing transportation to alternative schools within the region only, or to neighborhood school transfers from within the region only, and consider developing a pilot project to test a new approach. It also recognized there may be some additional transportation costs related to any boundary adjustments and possible school consolidations.

Clustering of Neighborhood Schools
One interesting idea that came out of the A&O process was a suggestion of clustering alternative and neighborhood schools in sub-regions that would include a wider variety of choice, and an equitable SES distribution. In the suggested scenario, students would be guaranteed a spot within the cluster, but not necessarily a specific school, and transportation would be provided within the cluster.

CHINESE IMMERSION

The proposal for a Chinese Mandarin Immersion program is clearly intended as an alternative program that will draw students from either the district and/or the Churchill region.
In considering the establishment of a Chinese Immersion School, there are several questions to answer. First, does the proposed Chinese Immersion constitute a proposal for an alternative school? Second, if it is an alternative school proposal, has it gone through the alternative school proposal process? Third, is it going to involve the conversion of an existing neighborhood school or is it proposed as a start-up standalone school?

It should be noted that the board just completed the Shaping 4J's Future strategic planning process wherein it made several decisions related to both alternative and neighborhood schools. In that process, it became clear that future decisions must consider longer term strategic needs of the district related to financial resources, declining enrollment, school boundaries, school closures and consolidations, reconfigurations, or alternative school locations.

Thus, one additional question that must be asked regarding the proposal for any new alternative school is how will it affect the viability of area neighborhood schools? The proposed Chinese Immersion school is intended to eventually enroll around 300 students grades K-5. While there may be some families who move into the district in order to attend a Chinese Immersion, it is doubtful that the number of new students will reach that number. This means most of the students will come from within the district, and therefore, will not be attending their neighborhood school or another district alternative school.

SPANISH LANGUAGE DUAL IMMERSION

While it was not entirely clear as to the purpose and intents related to the proposal from River Road/Camino del Rio with respect to converting to a Spanish language dual immersion, the fact that it is an existing neighborhood school puts it in a different context than if it were creating a new school. Although some of the elements discussed would make it fall into the category of establishing a new alternative school, the intention is primarily to address the educational needs of ELL and other Spanish speaking students by allowing them to learn in both Spanish and English, and create an environment where English speaking students can learn and interact in Spanish as well. Thus, while I think River Road/Camino del Rio could elect to develop a proposal under the board policy to establish an alternative school, I’m not sure its necessary to meet their goals. If the school's intent is to be able to take students from across the district through a lottery process similar to Buena Vista, then an alternative school is the appropriate way to go. If their primary intent is to better meet the needs of their growing number of Spanish-speaking students through a dual immersion program, I believe they can put together a proposal to do that within their school community and without becoming an alternative school.

The conversion of River Road/Camino del Rio also could have consequences for other elementary schools in North Eugene. We now have four neighborhood elementary schools (River Road/Camino del Rio, Howard, Awbrey Park and Spring Creek) and two alternative schools (Corridor and Yujin Gakuen) in the North region. If the proposed Spanish dual immersion is a K-12 it also has implications for the middle schools and the high school(s) in the region.
OPTIONS FOR BOARD ACTION:

Based on the background information and the discussion to this point with respect to the consideration of a Chinese Mandarin Language Immersion School in the Churchill Region and a Spanish Language Dual Immersion at River Road/Camino del Rio in the North Region, I believe the following options are available to the Board:

**Chinese (Mandarin) Language Immersion School:**

1. Direct staff to work with appropriate stakeholders to develop a formal plan and timeline for the implementation of a Chinese (Mandarin) Language Immersion School as a district alternative school with the target start date of September 2010 in the Churchill region.

   - This action would be based on a determination that proponents have **substantially met** the intent of the requirement for proposing establishment of a new district alternative school and signal board support for action to establish an additional language immersion alternative school as a part of the district program of school choice. The implementation plan would need to specify the proposed location, whether the school will be a conversion of an existing school program or the start-up of a new standalone school, the budget and staffing plan, and start-up costs of the school. District policies regarding enrollment and transportation for alternative schools would apply.

2. Direct staff to work with appropriate stakeholders to develop a formal alternative school proposal consistent with board policy for proposing establishment of an Alternative School.

   - This action would be based on a determination that proponents have **not substantially met** the intent of the policy for proposing establishment of a new district alternative school and signal board support for staff to continue to work with proponents on development of a more refined proposal that includes the following elements:
     a. An operational plan that includes staffing, proposed location of the school and facility requirements, support services needed, and the proposed timelines for establishing the school that conforms to applicable district policies, and that constitutes an efficient use of district resources.
     b. Evidence that establishment of the proposed school enhances the district’s educational program. Board goals and the Shaping 4J’s Future core values, goals and principles should be considered.
     c. A proposed budget for the school appropriate to the program that is proposed and that represents an efficient use of district funds. The budget request may include start-up costs to be paid by District 4J or to be solicited from other sources.
     d. Proposed criteria for selecting students for enrollment in the alternative school. The criteria must not unfairly discriminate among applicants and must be reasonably related to the educational goals of the school and the district.
     e. An assessment of potential adverse impacts on existing schools and programs.

(Note: adoption of either option 1 or 2 would signal the board’s interest in continuing to pursue the establishment of a Chinese language immersion program.)
3. Direct staff that the addition of a new language immersion alternative school at this time is neither practical nor feasible in light of declining enrollment, limited resources and the adverse impact on other neighborhood and alternative schools.
   - This action would signal that the board does not support the planning for a Chinese Language Immersion alternative school at this time, but would entertain a future application for board approval as a new alternative school under board policy IGBH after the board has had the benefit of working through the changes to be implemented as a result of the Shaping 4J recommendations and ascertaining the ramifications of those decisions.

Dual-Immersion Spanish/English Language

1. Direct staff to work with appropriate stakeholders to develop a formal plan and timeline for the implementation of a Spanish Language Dual Immersion School at River Road/Camino del Rio as a district alternative school with the target start date of September 2009.
   - This action would be based on a determination that proponents have substantially met the intent of the requirement for proposing establishment of a new district alternative school and signal board support for action to establish a Spanish language dual-immersion alternative school as a part of the district program of school choice. This would be an alternative school within the meaning of policy IGBH and thus be subject to the same terms and conditions that apply to other district alternative schools.

2. Direct staff to work with appropriate stakeholders to develop a formal alternative school proposal consistent with board policy for proposing establishment of an Alternative School at River Road/Camino del Rio.
   - This action would be based on a determination that proponents have not substantially met the intent of the policy for proposing establishment of a new district alternative school and signal board support for staff to continue to work with proponents on development of a more refined proposal that includes the following elements:
     a. An operational plan that includes staffing, proposed location of the school and facility requirements, support services needed, and the proposed timelines for establishing the school; that conforms to applicable district policies, and that constitutes an efficient use of district resources.
     b. Evidence that establishment of the proposed school enhances the district’s educational program. Board goals and the Shaping 4J’s Future core values, goals and principles should be considered.
     c. A proposed budget for the school appropriate to the program that is proposed and that represents an efficient use of district funds. The budget request may include start-up costs to be paid by District 4J or to be solicited from other sources.
     d. Proposed criteria for selecting students for enrollment in the alternative school. Criteria must not unfairly discriminate among applicants and must be reasonably related to the educational goals of the school and the district.
     e. An assessment of potential adverse impacts on existing schools and programs.
3. Direct staff to work with appropriate stakeholders to develop a proposal to establish a neighborhood cluster to support a Spanish dual-immersion school at River Road/Camino del Rio that includes Howard Elementary School that could include transportation within the neighborhood cluster.
   • This action would be based on a determination that proponents do not have to meet the requirement for proposing establishment of a new district alternative school because it is an expansion and modification of the neighborhood school consistent with the “academy school” direction to redesign the school with a particular focus. It will signal board support for action to establish a Spanish language dual-immersion neighborhood choice school.

(Note: adoption of either option 1, 2 or 3 would signal the board’s interest in pursuing the establishment of a Spanish language dual-immersion program.)

4. Direct staff that the addition of a Spanish language dual-immersion at River Road/Camino del Rio school at this time is neither practical nor feasible in light of declining enrollment, limited resources and the adverse impact on other neighborhood and/or alternative schools.
   • This action would signal that the board does not support the planning for a Spanish Dual Language Immersion school at this time, but would entertain a future application for board approval as a new alternative school under board policy IGBH after the board has had the benefit of working through the changes to be implemented as a result of the Shaping 4J recommendations and ascertaining the ramifications of those decisions.

**SUPERINTENDENT’S RECOMMENDATION:**

The Superintendent will recommend that the board, with respect to:

1. **Chinese (Mandarin) Language Immersion:**

   Direct staff to work with appropriate stakeholders to develop a formal alternative school proposal consistent with board policy for proposing establishment of an Alternative School to include development of a more refined proposal that includes the following elements:
   • An operational plan that includes staffing, proposed location of the school and facility requirements, support services needed, and the proposed timelines for establishing the school; that conforms to applicable district policies, and that constitutes an efficient use of district resources.
   • Evidence that establishment of the proposed school enhances the district’s educational program. Board goals and Shaping 4J Future core values, goals and principles should be considered.
   • A proposed budget for the school that is appropriate to the program proposed and that represents an efficient use of district funds. The budget request may include start-up costs to be paid by District 4J or to be solicited from other sources.
   • Proposed criteria for selecting students for enrollment in the alternative school. The criteria must not unfairly discriminate among applicants and must be reasonably related to the educational goals of the school and the district.
   • An assessment of potential adverse impacts on existing schools and programs.
2. **Spanish Language Dual Immersion at River Road/Camino del Rio:**

Direct staff to work with appropriate stakeholders to develop a proposal to establish a neighborhood cluster that includes Howard Elementary School to support a Spanish dual-immersion school at River Road/Camino del Rio. The proposal would be for an expansion and modification of the neighborhood school consistent with the "academy school" direction to redesign the school with a particular focus, and could include a proposal for transportation within the neighborhood cluster.

3. **Alternative School Policy IGBH**

Direct staff to propose by August 2008 revisions to the alternative school policy to reflect board direction from the Access & Options, Alternative School Reviews, and Shaping 4J’s Future.

XI. Comments and Committee Reports by Individual Board Members

XII. Adjourn

**CALENDAR FOR BOARD MEMBERS**

**MAY**
- Wednesday, May 21: Board Meeting 7 pm
- Thursday, May 29: District Retirement Reception 3-5 pm

**JUNE**
- Wednesday, June 4: Board Meeting 7 pm
- Friday, June 6: Board Retreat 1-5 pm
- Saturday, June 7: Board Retreat 8 am-noon
- Monday, June 9: IHS Graduation at Hult Center 7 pm
- Thursday, June 12: North Eugene Alternative Graduation in NEHS Auditorium 7 pm
- Thursday, June 12: Sheldon Graduation at Hult Center 7 pm
- Friday, June 13: Churchill Graduation at Hult Center 7 pm
- Saturday, June 14: North Eugene Graduation in Swede Johnson Stadium 3 pm
<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saturday, June 14</td>
<td>Churchill Alternative Graduation in Churchill Auditorium</td>
<td>7 pm</td>
</tr>
<tr>
<td></td>
<td>Yvette Webber-Davis and Tom Henry</td>
<td></td>
</tr>
<tr>
<td>Saturday, June 14</td>
<td>South Eugene Graduation at Hult Center</td>
<td>7 pm</td>
</tr>
<tr>
<td></td>
<td>Alicia Hays and Laurie Moses</td>
<td></td>
</tr>
<tr>
<td>Tuesday, June 17</td>
<td>Opportunity Center Graduation in South Eugene Auditorium</td>
<td>7:30 pm</td>
</tr>
<tr>
<td></td>
<td>Charles Martinez, Jim Torrey and Tom Henry</td>
<td></td>
</tr>
<tr>
<td>Wednesday, June 18</td>
<td>Board Meeting</td>
<td>7 pm</td>
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