



Corvallis
SCHOOL DISTRICT

NOTICE

NOTICE IS HEREBY GIVEN of a meeting of the Corvallis School District Board of Directors.

Date & Time	Meeting Type	Location	Agenda
Thursday, September 14, 2017 6:30 PM	Regular	District Office Board Room, 1555 SW 35th Street, Corvallis, OR 97333	See attached.

Accessibility: *To request accommodations for board meetings, please contact Kim Nelson at 541-757-5841 or kim.nelson@corvallis.k12.or.us at least 48 hours before the meeting.*

If you would like to watch live-streaming of the School Board meeting, please navigate to the District's YouTube channel: <https://www.youtube.com/channel/UC9Jtp5dmilZl9kySBJbVQ?>
A recording of the meeting will also be posted to that channel.

POSTED: Corvallis School District Administration Building
Hans Boyle, Education Editor, Gazette Times (Via Email)

For more information, please contact Kim Nelson at 541-757-5841 or at kimberly.nelson@corvallis.k12.or.us



Corvallis

SCHOOL DISTRICT

Thursday, September 14, 2017
6:30 PM

AGENDA
Business Meeting of the
BOARD OF DIRECTORS
Corvallis School District 509J

Meeting Details: Thursday, September 14, 2017, 6:30 PM in the District Office Board Room, 1555 SW 35th Street, Corvallis, OR 97333.

If you would like to watch live-streaming of the School Board meeting, please navigate to the District's YouTube channel: <https://www.youtube.com/channel/UC9Jtpte5dmilZI9kySBJbVQ?> A recording of the meeting will also be posted to that channel.

- I. CALL TO ORDER AND ROLL CALL
- II. PLEDGE OF ALLEGIANCE
- III. REPORTS FROM BOARD LIAISONS TO DISTRICT WORK GROUPS/COMMITTEES
- IV. BOARD-SCHOOL LIAISON REPORTS
- V. SUPERINTENDENT'S REPORT



Corvallis
SCHOOL DISTRICT

Superintendent's Update

Shared with the Corvallis School Board during the September 14, 2017 meeting.

Professional Development for Corvallis School District Staff

We are off with a strong start to the 2017-18 school year. I would like to thank our district office staff for managing several professional development activities this summer.

Suzanne McFarland Price facilitated the New Teacher Academy welcoming 24 teachers with 2+ years of teaching experience and 17 teachers who are just starting out in the teaching profession. It is always a highlight for me to have the opportunity to meet with the newest members of our teaching staff.

More than 750 district staff gathered on August 31st at Corvallis High School to kick off the school year. We were pleased to host keynote speaker Manny Scott. Manny's story touched and inspired everyone in attendance and reminded each of us that meaningful connections with students can turn a life around and set a new course for success. A wellness rally and additional training opportunities followed the keynote. Thank you to Chris Hawkins, Gigi Sims, and Karen Selander for taking the lead on planning this annual event.

All elementary staff attended a workshop the following day by Dr. Stuart Ablon to learn about collaborative problem solving. This model includes two major beliefs: Kids do well if they can and when they struggle behaviorally it is due to a lagging skill we can help them acquire.

The Confederation of Oregon School Administrators and Apple Inc. in conjunction with our district will be providing a free opportunity on September 28-29 for select Oregon school districts to receive training for 5 elementary or middle school teachers per district to receive training to support coding instruction in their schools. Coding is essential to help students thrive in a future driven by technology. The curriculum, apps (SWIFT) and this training session are all free.

Enrollment

As of this week, total district enrollment is 6,731 students, while our projected enrollment was 6,632. Overall enrollment is 99 students above our projections and we have added teaching staff to address high class loads.

Thank you to the Corvallis Public School Foundation

We are grateful to the Corvallis Public Schools Foundation for their support of kindergarten students this fall with a grant of \$20,500. The goal of the Foundation with this grant is to close the kindergarten readiness gap and, in the long run, to improve graduation rates across our district. Thank you to our community donors and to the Foundation for their support. Liv Gifford will be invited to present an annual update to the school board later this fall.

District Media Specialist Hired

Dana Zachary was hired as our new district media specialist. This is a first step to enhance the library media programs throughout the district. Dana is a licensed language arts teacher and librarian and was previously the media assistant at Cheldelin Middle School. She was a critical part of making the library at Cheldelin the hub of daily school activities with weekly lunch participation opportunities of Reader Theater, student performances, and slam poetry. She also started book clubs, book talks, writer's club, and story time for kids. Her goal for this year is to create a district-wide program that includes offering professional development for staff, developing digital resources, and helping school libraries become the place where students can explore their interests. We will be inviting Dana to a future board meeting to share her ideas.

Activities in Support of Inclusion and Diversity in Our District

Our community is diverse and our schools include students from more than fifty birth countries. We know that many families and staff are uncertain and concerned about how the announced changes to Deferred Action for Childhood Arrivals program (DACA) will affect our current students, graduates and families.

We want to remind and reassure our families and our community that the Corvallis School District welcomes and educates all students. I am proud that last December our school board unanimously approved Resolution Number 16-1201- Rights of Undocumented Students and Protocols for Immigration and Customs Enforcement (ICE) Access to Schools. Since that time, we have developed and implemented a plan to train all teachers, administrators and other staff on how to respond if ICE personnel attempt to enter CSD property or request information about our students and their families. As a reminder, we do not collect student immigration status.

We are committed to supporting the success of every student and creating a safe and welcoming environment for every family. Our schools should be safe places where everyone treats each other with kindness and respect, regardless of race, culture, socio-economic status or language. I am committed to making sure our schools are safe spaces for all students to learn and grow.

Events

Our equity leadership team will continue to collaborate with community partners to support students and families with events such as Know Your Rights, DACA awareness training and how to support students impacted by recent events (for staff), and a special program offered through the Mexican Consulate to provide information and resources for passports and consular ID cards for Mexican citizens.

New Community Partnership

Community is one of our core values and developing stronger community partnerships is a priority as we work to provide a well-rounded and culturally relevant education for our students. Last spring, our teaching and learning team began working to create a family welcome center at Western View Center (which is located just north of the district administration building). During that time, we learned that the board of directors of Casa Latinos Unidos de Benton County was searching for a new location.

Casa Latinos Unidos is a 501(c) 3 non-profit whose mission is to facilitate the integration of Latinos into the broader community by promoting the well-being of Latino families, by providing opportunities for leadership and capacity building, supporting and advancing their equal rights and equal access, and creating a climate of tolerance and cross-cultural understanding.

Casa Latinos Unidos de Benton County has been a key partner in our work around inclusive practices and removing systemic inequities in our system and we initiated a discussion about a possible new partnership and shared facility space.

After preliminary meetings with district staff and a tour of the site, the Casa Latinos Unidos board met and voted unanimously to relocate their operations to the Western View Center. Our facilities staff is drafting an agreement between the two organizations and we expect this facility to serve a wide range of student and family needs starting later this fall.

Student Artwork

Our student artwork on display this month is an exhibit from Linus Pauling 8th graders. They made a trip to Mary's Peak last spring and were asked to reflect on the natural environment through paintings, drawings, and poems. Thank you to LPMS art teacher Claudia Hall for sharing this student work.

Ryan Noss, Superintendent



Corvallis

SCHOOL DISTRICT

VI. PUBLIC/STAFF COMMENT - (20 minutes)

NOTE: To indicate your desire to comment, please complete a request card at the meeting and turn it in to the Board Secretary before the meeting begins. See attached guidelines for providing input to the School Board.



Providing Input to the School Board

(Revised 08-31-17)

The Corvallis School Board values the opinions and input of community patrons. As such, the purpose of this document is to provide general guidelines about how to make the most of your time when communicating with the Board. The public may offer comments during meetings or correspond in writing via email or U.S. mail, as outlined below.

I. Written Correspondence

Letters, emails and other written materials submitted to the Board are considered public record. They may be submitted via U.S. mail to: Corvallis School Board, Attn: Julie Catala, P.O. Box 3509J, Corvallis, OR 97339. Emails may be sent to: schoolboard@corvallis.k12.or.us, and will reach all Board members as a group. Others who will receive emails sent to this address: Superintendent, Assistant Superintendent, Human Resources Director, Finance and Operations Director, and Executive Assistant to the Superintendent and Board of Directors (also known as the Board Secretary).

II. Public Comment at Meetings

Members of the public have the opportunity to share their ideas and opinions with the Board during the agenda item labeled *Public Comment*. These opportunities are offered only during Business and some Special Meetings of the School Board. Spanish language interpreter services will be available at Business Meetings.

To request the opportunity to offer public comment

- A. Complete a "Comment Request" card, which can be found on a table at or outside the entrance to the meeting room, and give it to the Board Secretary at the head table **before** the meeting begins.
- B. Complete all requested information. Failing to fully and clearly complete the card and/or to submit it to the Board Secretary before the meeting begins may affect your opportunity to offer comments at the meeting.
- C. Although it is not required, you may wish to prepare a written statement from which to read during the meeting; if so, you may choose to leave your written comments with the Board Secretary to file with the official minutes of the meeting.
- D. Although they are not required, you are welcome to provide handouts to the Board; if so, please bring 13 copies and give them to the Board Secretary to distribute.
- E. The Board Secretary will sort cards, by topic, when they are completely filled out and were submitted before the meeting started. If there were several cards in one set/topic, the Board Secretary will draw one card from each set, in turn.
- F. If more comment requests were submitted than could be accommodated during the allotted time on the Board's agenda, you might not be called upon to provide your comments. In that case, you may submit your comments in written form; see below for information.

- G. When you testify, your name, address and comments are matters of public record; however, students and staff do not need to provide their addresses.

Rules for Public Comment

- A. When you're called on to comment, proceed to the podium/table in front of the Board, state your name and the topic you will address before you begin. This is a matter of public record and will not count against your time. Only one person at a time is allowed to be at the podium/table, with exceptions at the discretion of the Board Chair.
- B. Direct your comments to the Board. The Board Chair will refer questions or requests for action to an appropriate person who will provide a response at a later date.
- C. Keep your comments within the specified time allotted, usually three minutes. The Board Secretary will signal you with one chime when you have 30 seconds remaining and with two chimes when your time is up.
- D. If others have spoken before you about the same issue, please state that fact and either decline to comment or limit your comments to points not already stated.
- E. If a group wishes to speak, designate one spokesperson for the group; that person will stand at the podium/table. In order to maintain the meeting schedule, repetitious comments are discouraged.
- F. Speakers may offer objective criticism of district operations and programs, but the Board will not hear complaints concerning individual District personnel. Any such complaints must be handled following the steps outlined in policy "KL-Public Complaints" and administrative regulation "KL-AR-Public Complaints," copies of which are available during meetings at which public comment is accepted or online at <http://policy.osba.org/corvall/KL/index.asp>.
- G. Complaints regarding budget, programs, or other District issues also should be handled by following the steps outlined in policy KL. Challenges of instructional resources or materials used by the District are subject to the rules and regulations of policy "II/IIA-Instructional Resources/Instructional Materials" at <http://policy.osba.org/corvall/I/index.asp>.
- H. Undue interruption or other interference with the orderly conduct of Board business cannot be allowed. Defamatory or abusive remarks are always out of order. The Board Chair may terminate the speaker's privilege of address if, after being called to order, the speaker persists in improper conduct.

III. Telephone Communication

Vincent Adams	541-738-4324; 541-240-4055	Ed Junkins	801-706-1892
Sami Al-AbdRabbuh	541-283-6611	Terese Jones	541-230-1673
Judy Ball	541-758-1671; 240-997-1222	Sarah Finger McDonald	541-908-3756
Jay Conroy	541-912-4380		



Corvallis

SCHOOL DISTRICT

VII. SPECIAL REPORTS

VII.A. Fundraising Task Force Recommendations; Review and Discussion
Regarding Revised DEDA-AR - Fundraising for Programs, Activities, or
Projects



Corvallis

SCHOOL DISTRICT

Prepared for: Corvallis School Board

Prepared by: Scott Perry, Fundraising Task Force Facilitator

Meeting Date: September 14, 2017

Fundraising Task Force Report – Executive Summary

NO ACTION REQUIRED

Background

The Fundraising Task Force (FTF) was scheduled to meet five times between March 2017 and June 2017 to develop a fundraising policy and administrative regulation recommendation for the superintendent; however, members agreed to add three additional meetings in order to complete the scope of their work. The full report, which includes meeting notes, will be available at the September 14, 2017, board meeting; however, following is an executive summary.

Then-School Board Chair Alexis McQuillan attended the first meeting of the task force to provide background on the purpose of this work. Superintendent Noss attended two task force meetings: one to talk about the charge of the task force and one to talk about the district's work regarding equity. Finance and Operations Director Olivia Meyers Buch attended two task force meetings to provide financial information and respond to questions. As facilitator of the task force, I attended all meetings and am in the best position to share about the work of the task force. I will be present at the September 14, 2017, board meeting to share my insights and to respond to questions from board members.

The task force included broad representation of parent organizations from Corvallis schools as well as the Corvallis Public Schools Foundation Executive Director. It was convened by Superintendent Noss with the charge to develop a fundraising policy and administrative regulation for the superintendent that:

- Provided a recommendation as to whether non-public school funds should be used to pay for staff costs and, if so, how it would be implemented.
- Acknowledged and encouraged the enhancement of school programs, activities and facilities through financial and in-kind donations.
- Supported the work of the Corvallis Public Schools Foundation and identified areas of common interest.
- Provided guidance for fundraising across the district.
- Aligned with Board Policy JBB – Educational Equity.

Task force assessment and analysis included:

- Review of Board policy JBB – Educational Equity, and discussion of the meaning of equity.
- Study of information about demographic differences between schools.
- Review of district student achievement data, and state/national policy examples.
- Examination of fundraising history and patterns and how these funds support school programs.
- Review of sample policies and practices.
- Testimony from four Latino families, the district's liaison to Arabic students, and a district specialist working with students and families navigating poverty.

Policy and Administrative Regulation Recommendations

No changes were recommended to Board Policy DEDA – Fundraising for Programs, Activities or Projects. The task force recommended the following components for Administrative Regulation DEDA-AR – Fundraising for Programs, Activities or Projects:

- No student or staff shall be coerced or compelled to participate in fundraising activities.
- Fundraising will not interfere with student learning.
- Fundraised funds shall not be used for delivery of state-assessed core curriculum or maintenance of a safe learning environment.
- Funds for staff (FTE) must be approved by the superintendent or designee.
- District administration and representation from building principals shall meet twice annually with leadership from each parent organization (PTA/PTO), a representative of the Corvallis Public Schools Foundation, and representatives of traditionally underrepresented populations to develop and collaborate on shared fundraising goals/efforts and establish priorities for district-wide fundraising.
- Establish a District Equity Fund with the purpose of equalizing enrichment opportunities and meeting district-wide goals set by a leadership group.
- Encourage PTOs/PTAs to donate 10%-25% of fundraised monies annually (or fundraise an equivalent amount) to the District Equity Fund and/or Corvallis Public Schools Foundation.
- District collect and maintain accurate information about fundraised dollars.
- Encourage every school to enter into a “Sister School” relationship with at least one other school in the district to collaborate on selected fundraising and learning enrichment activities.

Additional Recommendations

The task force recommended that the district:

- Communicate and engage with all constituent groups as much as possible (in multiple languages) as early as possible prior to board action, so that they understand not only the recommendations but the rationale.
- Add other administrative regulation elements necessary for effective fiscal monitoring and accountability.
- Consider district-level grant writing support accessible by all schools.
- Review the district's policy and administrative regulation one year after implementation, and then on a regular basis not to exceed every five years, by a task force representing each school, the Corvallis Public Schools Foundation and equitable representation of traditionally underrepresented student/family populations.



Corvallis

SCHOOL DISTRICT

Prepared for: Corvallis School Board
Prepared by: Superintendent Ryan Noss
Meeting Date: September 14, 2017

Administrative Regulation DEDA-AR – Fundraising For Programs, Activities, or Projects

NO ACTION REQUIRED

Background

I convened a Fundraising Task Force with the charge to develop a fundraising policy and administrative regulation that:

- Provided a recommendation as to whether non-public school funds should be used to pay for staff costs and, if so, how it would be implemented.
- Acknowledged and encouraged the enhancement of school programs, activities and facilities through financial and in-kind donations.
- Supported the work of the Corvallis Public Schools Foundation and identified areas of common interest.
- Provided guidance for fundraising across the district.
- Aligned with Board Policy JBB – Educational Equity.

Based on the recommendations of the task force, I have revised Administrative Regulation DEDA-AR – Fundraising for Programs, Activities or Projects. It is attached for review and discussion at the September 14, 2017, board meeting.

The task force recommended no changes to Policy DEDA – Fundraising for Programs, Activities or Projects.

Fundraising for Programs, Activities, or Projects

A fundraising project will follow the approval process set forth below:

1. All fundraisers for Corvallis public schools must receive prior approval.
2. Fundraising for a specific school with a goal of:
 - a. Less than \$10,000 must be approved by the principal.
 - b. \$10,000-\$75,000 must be approved by the principal and superintendent or designee.
 - c. Greater than \$75,000 must be approved by the principal, superintendent, and School Board.
3. Any funds for FTE raised at the building level must be approved by the superintendent or designee with any decision guided by policy JBB educational equity.
4. Money raised through fundraising at the building level will not be used to provide resources necessary for:
 - a. The delivery of state-assessed core curriculum.
 - b. A safe learning environment, e.g., structural repair, sanitation, emergency repair.
5. If fundraising is non-school specific, approval at any level must first be granted by the superintendent or designee. ~~Corvallis Public Schools Foundation.~~

All approved fundraising projects must meet the following criteria:

1. All fundraising programs, activities, or facility improvements will remain under the direct control of the district.
2. Under no circumstances will students or staff be coerced or compelled to participate in fundraising activities. Fundraising will not interfere with student learning. Students may not be barred or otherwise penalized because of a refusal to participate in fund-raising activities conducted on behalf of the school or district.
3. All moneys or pledges should be secured ~~no later than 30 calendar days~~ prior to the starting date of the program, activity, or capital project. Exceptions may be granted at the time of approval.

4. Funds collected must be made payable to the Corvallis Public Schools Foundation, Corvallis School District, school, or parent group as designated in the approval process. No checks may be made out to any other individuals.
5. In the event sufficient money is not raised, the proposed program or activity will be reduced or discontinued. Money donated will remain in the designated program or activity fund for two years. After two years, unspent funds will be moved to the district Educational Equity Fund. ~~one year.~~
6. ~~Any unspent funds raised on behalf of the district for ongoing programs or activities will be retained in the appropriate program or activity account for which it was raised.~~
7. ~~In the event a program or activity is reduced or discontinued AND the funds can not be used for designated purposes for one year, donors will be contacted to re-direct their gifts.~~

The following regulations are to encourage a sense of shared community and success for all students district-wide.

1. District administration and representation from building principals, will meet twice annually with leadership from each parent organization (PTO/PTA) and the Corvallis Public Schools Foundation to collaborate on shared goals, ideas and fundraising efforts with the goal of maximizing the benefit to all Corvallis School District students. Additional members will be included in these meetings such that equitable representation of traditionally underrepresented populations is reflected.

One task of this group will be to establish priority purposes and goals for district-wide fundraising. All schools will be encouraged to participate and dedicate a portion of their fundraising efforts toward meeting those purposes and goals.

2. A district Educational Equity Fund shall be established into which individuals and organizations may contribute with the purpose of equalizing enrichment opportunities for district students and working to meet the purposes and goals identified through the process described in 1. above.
3. To address inequity in schools, PTOs/PTAs are encouraged to donate 10 percent to 25 percent of fundraised moneys annually (or fundraise an equivalent amount) to the district Educational Equity Fund and/or Corvallis Public Schools Foundation for the advancement of equity.
4. With a focus on increasing transparency among individual schools, Corvallis School District administration shall facilitate the collection and exchange of accurate information about fundraising dollars such that this information is readily available for review.
5. Every school in the district is encouraged to enter into a “sister school” relationship with at least one other school in the district. “Sister schools”, including their PTA or PTO organizations, are encouraged to collaborate together on selected fundraising activities, joint learning enrichment activities, activities promoting cultural awareness, and

generally collaborate and leverage resources for the benefit of the students and families of both schools.

- 6.8. The district is responsible for all educational program decisions, hiring, and payment of all instructional and support staff as well as independent contractors. ~~Educational programs include any programs, fund-raised or otherwise, that enhance or enrich student learning such as artists in residence, assemblies, special programs, and electives.~~ This requirement ensures the district maintains compliance with federal, state and district rules on hiring, employee management, purchasing, and reporting.



CORVALLIS SCHOOL DISTRICT

**FUNDRAISING
TASK FORCE**

**REPORT TO THE SUPERINTENDENT
JULY 13, 2017**

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FUNDRAISING TASK FORCE CHARTER

Sponsor	Facilitator	Start Date	Sunset Date
Superintendent Noss	Scott Perry	March 2017	December 2017

Goals & Objectives	Develop a fundraising policy and administrative regulation recommendation for the superintendent that: • Provides a recommendation as to whether non-public school funds should be used to pay for staff costs and, if so, how it would be implemented. • Acknowledges and encourages the enhancement of school programs, activities and facilities through financial and in-kind donations • Supports the work of the Corvallis Public Schools Foundation and identifies areas of common interest. • Provides guidance for fundraising across the district • Aligns with board policy JBB – Educational Equity
Scope	Task force assessment and analysis will include: • Discussion of the meaning of equity • Study of information about demographic differences between schools • Examination of fundraising patterns and how these funds support school programs. • Review of sample policies and practices
Proposed Task Force Members	• Parent Group Representatives – 13 (one from each school) • Corvallis Public Schools Foundation Representative – 1
Liaisons to Task Force	• Superintendent • Director of Finance and Operations • School Board Representative (ex-officio member)
Meeting Frequency	The task force will meet five times between March 2017 and June 2017 to develop a fundraising policy and administrative regulation recommendation. The task force may meet again in late 2017 to consider revisions to the recommended policy and administrative regulation.
Procedures & Process	A consultant will facilitate all meetings. Recommendations will be developed using a collaborative process in which task force members develop and agree to support a decision in the best interest of the whole group. All meetings will be open to the public to observe; written input from the public may be submitted to the task force.
How Recommendations are Communicated	Recommendations will be communicated to the superintendent through a final report that includes meeting minutes and a draft policy with accompanying administrative regulation.
Policy Adoption	After the task force develops a recommendation for the superintendent, the superintendent will present a policy and accompanying administrative regulation to the School Board for adoption.
Sunset Clause	The task force will sunset upon board adoption of a new fundraising policy and administrative regulation (December 2017).

Educational Equity

The district is committed to the success of every student in each of our schools. For that success to occur, the district is committed to equity by recognizing institutional barriers and creating access and opportunities that benefit each student. “Achieving equity” means students’ identities will not predict or predetermine their success in school.

Educational equity is based on the principles of justice in allocating resources, opportunity, treatment and creating success for each student.

Educational equity promotes the real possibility of equality of educational results for each student and between diverse groups of students. Equity strategies are intentional, systemic, and applied across all district operations with an emphasis on teaching and learning processes.

To achieve educational equity, the district commits to:

1. Systematically using districtwide and individual school level data, disaggregated by race, ethnicity, national origin, language, special education, sex, socioeconomic status, and mobility¹ to inform district decision making.
2. Raising the achievement of all students while narrowing the gap between the lowest and the highest performing students.
3. Eliminating disparity in all aspects of education and its administration, including but not limited to, the disproportionate representation of students by race, poverty, sex, sexual orientation², and national origin in discipline, special education, and in various advanced learning.
4. Graduating all students ready to succeed in a diverse local, national, and global community.

In order to achieve educational equity for each and every student, the district shall make every effort to:

1. Provide every student with equitable access to high quality curriculum, support, facilities, and other educational resources, even when this means differentiating resource allocation.

¹These are data categories that the Oregon Department of Education collects. Districts may choose to add to this list from data the district collects.

²“Sexual orientation” is defined by Oregon Revised Statute (ORS) 174.100(7) to mean an individual’s actual or perceived heterosexuality, homosexuality, bisexuality or gender identity, regardless of whether the individual’s gender identity, appearance, expression or behavior differs from that traditionally associated with the individual’s sex at birth.

2. Review existing policies, programs, professional development, and procedures for the promotion of educational equity, and all applicable new policies, programs, and procedures will be developed with educational equity as a priority.
3. Actively work toward a teacher and administrator workforce that reflects the diversity of the student body. The district seeks to recruit, employ, support, and retain a workforce that includes racial, sex, and linguistic diversity, as well as culturally responsive administrative, instructional, and support personnel.
4. Ensure that every employee in the district is responsible and accountable for the learning and achievement of all students and for building a culture that reinforces this responsibility.
5. Provide professional development to strengthen employees' knowledge and skills for eliminating opportunity gaps and other disparities in achievement.
6. Create schools with a welcoming, inclusive culture and environment that reflects and supports diversity of the student population, their families, and their community.
7. Include partners who have demonstrated culturally specific expertise, including but not limited to, families, government agencies, institutions of higher learning, early childhood education organizations, community-based organizations, local businesses, and the community in general in meeting our high goals for educational outcomes. The district shall seek to involve students, staff, families, and community members who reflect district demographics to inform decisions regarding the narrowing of the achievement and other opportunity gaps.
8. Provide multiple pathways to success in order to meet the needs of the diverse student body and shall actively encourage, support, and expect high academic achievement for each student.
9. Provide materials and assessments that reflect the diversity of students and staff and are geared toward the understanding and appreciation of culture, class, language, ethnicity, poverty, ability, and other differences that contribute to the uniqueness of each student and staff member.

The superintendent shall include equity practices in the district's equity transformation plan to implement this policy. The superintendent will report to the Board the progress of the equity transformation plan.

END OF POLICY

Legal Reference(s):

[ORS 174.100\(7\)](#)
[ORS 332.075](#)

[ORS 332.107](#)

[ORS 342.437 to -342.449](#)

Fundraising for Programs, Activities or Projects

The Board acknowledges and endorses the desire of school-related support groups to enhance school programs, activities, and facilities by making financial and in-kind contributions. Such groups include, but are not limited to, parent-teacher associations, parent-teacher clubs, booster clubs, community associations, and support groups for a particular sport or activity. Generally, the purposes for such contributions are identified by the officers of the support group in consultation with the school principal and/or sport or activity advisor.

A policy is required to maintain consistency and provide guidance for fundraising across the district. Therefore, significant fundraisers as defined in the following administrative regulation must receive prior approval from the superintendent or School Board. The Board may grant permission to school-related or community individuals, groups, or organizations and others to provide financial support and/or conduct fundraising for the benefit of the district. Maintaining equal educational opportunities and supporting the district's programs will guide all decisions.

The superintendent is directed to develop an administrative regulation to implement this policy. Following superintendent review and recommendation, proposals may be submitted to the Board for information purposes or for final approval.

END OF POLICY

Legal Reference(s):

[ORS 294.305 - 294.565](#)

[ORS 332.107](#)

[ORS 332.155](#)

FUNDRAISING TASK FORCE MEMBERS

NAME	REPRESENTING
Rachel Roberts	Adams Elementary School
Courtney Shaff	Garfield Elementary School
Kelly Guenther	Hoover Elementary School
Nina Erlich-Williams	Jefferson Elementary School
Aaron Lesan	Lincoln Elementary School
Aubrey Eveland-DeWan	Wilson Elementary School
Amy Crump	Franklin K-8 School
Lon McQuillan	Cheldelin Middle School
Kelsey Hibbert	Linus Pauling Middle School
Loren Chavarria Bechtel	Corvallis High School
Andre Gatien	Crescent Valley High School
Art Koebel	Harding Center
Liv Gifford	Corvallis Public Schools Foundation

Facilitation provided by Scott Perry
Clerical support provided by Julie Catala

TASK FORCE BACKGROUND AND PROCESS

Charter

The Fundraising Task Force was convened by Corvallis School District Superintendent Ryan Noss. Goals and objectives of the Task Force as outlined in the superintendent's Fundraising Task Force Charter were to develop a fundraising policy and administrative regulation recommendation for the superintendent that:

- Provides a recommendation as to whether non-public school funds should be used to pay for staff costs and, if so, how it would be implemented.
- Acknowledges and encourages the enhancement of school programs, activities and facilities through financial and in-kind donations.
- Supports the work of the Corvallis Public Schools Foundation and identifies areas of common interest.
- Provides guidance for fundraising across the district
- Aligns with board policy JBB – Educational Equity

The scope of the Task Force work as outlined in the Charter included:

- Discussion of the meaning of equity
- Study of information about demographic differences between schools
- Examination of fundraising patterns and how these funds support school programs
- Review of sample policies and practices

The Charter also indicates that once these recommendations are provided to the superintendent, the superintendent will present a policy and accompanying administrative regulation to the School Board for adoption.

Task Force Process Summary

The Fundraising Task Force met eight times between April 12 and July 13. During the first meeting they identified the essential information they would need to make quality decisions. The subsequent three meetings included a review of school-specific fundraising and related budget patterns, district and building demographics, Corvallis student achievement patterns, state and national policy examples and descriptions from each building principal in the District regarding fundraising over the past year and how fundraised dollars are spent. The group also reviewed the District's board policy JBB – Educational Equity. The Task Force schedule was originally set at five sessions but during the fourth session the group decided to extend to additional sessions to allow for one full

session devoted entirely to presentations from several key Corvallis student/family populations. Therefore, the fifth session included presentations from four Latino families, the District's liaison to Arabic students and families and a District specialist working with at-risk students and students/families experiencing economic disadvantage.

Attached are minutes from each of the Task Force sessions. Also attached are appendices including all district data, policies and related articles which were reviewed by the Task Force.

Brainstorming and Prioritization

Sessions six, seven and eight consisted of group brainstorming and prioritizing of options and finalizing of report recommendations. As part of the brainstorming process Task Force members considered the superintendent's Fundraising Task Force Charter, policy JBB (Educational Equity) and all the other information reviewed in sessions 1 through 5. They then worked together to brainstorm options that met the following conditions:

1. The policy, procedure or strategy helps provide all Corvallis students with access to an equitable full spectrum of quality education experiences, no matter which Corvallis public school they attend.
2. The policy, procedure or strategy fosters a fundraising system that does not lead to a decline in voluntary contributions from non-public school funding sources.
3. The policy, procedure or strategy clarifies rules related to use of outside (non-public school) resources to hire staff (FTE).

TASK FORCE RECOMMENDATIONS

Board Policy

The Task Force recommends no changes to Board Policy DEDA – Fundraising for Programs, Activities or Projects. The policy, as written, states full Board support for fundraising in the district, highlights the need for Administrative Regulations, affirms the importance of maintaining consistency across the district and includes the statement that “maintaining equal educational opportunities and supporting the district’s programs” will guide board decisions.

Administrative Regulation

The Task Force submits the following set of administrative regulations for consideration by the Superintendent:

Fundraising for Programs, Activities or Projects (DEDA-AR) (Administrative Regulations Recommendations)

The intention of these guidelines is to encourage a sense of shared community and success for all students regardless of school.

The Corvallis School District and School Board place significant importance on the principle of equity among the broader student population (see Board Policy JBB – Educational Equity) and encourage creative collaboration and teaming in providing these additional opportunities not just within a school but district-wide.

The Corvallis School District and School Board acknowledge, endorse and appreciate the desire of parents, school-related groups, and community members to enhance learning opportunities at school through fundraising activities and financial and in-kind donations. The District and School Board believe these contributions add significant value to our children’s education and are important to providing experiences that supplement and motivate our students.

The following regulations apply to fundraising activity in the Corvallis School District:

1. Under no circumstances will students or staff be coerced or compelled to participate in fundraising activities. Fundraising will not interfere with student learning. Students may not be barred or otherwise penalized because of refusal to participate in fundraising activities conducted on behalf of the school or district.
2. Unless specifically approved by the superintendent or designee, money raised through fundraising at the building level will not be used to provide resources necessary for:

- a. The delivery of state-assessed core curriculum, e.g., textbooks/resources required to deliver that curriculum.
 - b. A safe learning environment, e.g., structural repair, sanitation, emergency repair.
3. Any funds for FTE raised at the building level must be approved by the superintendent or designee with any decision guided by the equity policy.
4. With a focus of increasing transparency among individual schools, Corvallis School District administration shall facilitate the collection and exchange of accurate information about fundraised dollars such that this information is readily available for review.
5. Leadership from each parent organization (PTO/PTA) will meet twice annually with Corvallis School District administration, and representation from building principals and the Corvallis Public Schools Foundation to collaborate on shared goals, ideas and fundraising efforts with the goal of maximizing the benefit to all Corvallis School District students. Additional members will be included in these meetings such that equitable representation of traditionally underrepresented populations is reflected.

One task of this group will be to establish priority purposes and goals for district-wide fundraising. All schools will be encouraged to participate and dedicate a portion of their fundraising efforts toward meeting those purposes and goals.

6. A District Educational Equity Fund shall be established into which individuals and organizations can contribute with the purpose of equalizing enrichment opportunities for district students and working to meet the purposes and goals identified through the process described in #5 above.
7. To address inequity in schools, PTOs/PTAs are encouraged to donate 10%-25% of fundraised monies annually (or fundraise an equivalent amount) to the District Educational Equity Fund and/or the Corvallis Public Schools Foundation for the advancement of equity.
8. Every school in the district is encouraged to enter into a “Sister School” relationship with at least one other school in the district. “Sister Schools”, including their PTA or PTO organizations, are encouraged to collaborate together on selected fundraising activities, joint learning enrichment activities, activities promoting cultural awareness, and generally collaborate and leverage resources for the benefit of the students and families of both schools.

(End of Administrative Regulation recommendations.)

Additional Recommendations for Consideration

- The Task Force recommends that the district communicate and engage with all constituent groups as much as possible (in multiple languages) as early as possible prior to board action, so that they understand not only the recommendations but the rationale and data behind those recommendations.
- The Task Force recommends that other Administrative Regulation elements be considered for addition by district administration that the district deems necessary for effective fiscal monitoring and accountability purposes.
- The Task Force recommends that the District consider allocation of district funds to provide grant writing and grant management support for the district and all district schools to assist them in increasing funding from non-public school sources.
- The Task Force recommends that the district policy and revised Administrative Regulation be reviewed again one year after implementation and then on a regular basis not to exceed every five years by a Task Force representing each school and the Corvallis Public Schools Foundation, and including equitable representation of traditionally underrepresented student/family populations. At those reviews the Task Force should consider elements such as:
 - What impact have the revised Administrative Regulations had on fundraising activity and funding levels on a school-by-school basis and what other unintended consequences have been experienced?
 - What is the evidence that equity-related issues have, or have not been addressed by the revisions to the Administrative Regulations?
 - What additional adjustments should be made to Policy or Administrative Regulations in light of the data?
 - How might these be applied to and/or impact other fundraising groups such as booster clubs?



Fundraising Task Force Meeting Notes
April 12, 2017; 6:30-9:00
Corvallis School District Administrative Offices
1555 SW 35th Street; Corvallis, OR 97333

Throughout these meeting notes, comments of task force members appear in *italic print*; those of the facilitator and identified presenters are in regular print. Unless enclosed in quotation marks, comments have been edited for clarity and brevity. Also for clarity, comments made by the facilitator and/or identified presenters will be preceded with the speaker's initials.

1. Welcome

Superintendent Ryan Noss (RN) welcomed everyone and expressed appreciation for their service on the task force. He introduced Board Chair Alexis McQuillan (AM) and facilitator Scott Perry (SP).

(RN) It's important for this group to come together to talk about beliefs and values, and to work collegially to support the district. Board Chair Alexis McQuillan (AM) and I will attend part of tonight's meeting but will attend future meetings only as needed.

2. Task Force Purpose

(AM) The district has been using an equity lens to look for and break down barriers in our system that interfere with students' ability to succeed at their highest potential. The issue around fundraising is mostly about how we're paying for certain positions in our schools, and is something the board wanted to examine; the Corvallis community is extremely generous and as a result, some schools have been able to fund additional staff while others haven't.

(RN) The district is a member of the Oregon School Boards Association (OSBA) and subscribes to its policy service. As laws change related to education, OSBA looks at the policies they currently have, drafts new language as needed, and forwards it to districts as "required" policies. OSBA also recommends policies, which each district can choose whether or not to adopt. Districts can also draft their own policies, which go through OSBA's legal department to make sure they comply with applicable laws; the policy this task force will draft will also be vetted through OSBA.

(AM) The board wanted to bring the school communities together to address this sensitive issue. You have a lot of experience, knowledge and great ideas and I'm eager to see how you will collaborate and what ideas you'll come up with. I appreciate the time you're going to devote to this process, especially considering how difficult evening meetings are on families.

3. Introductions

Mr. Perry gave a synopsis of his background and explained his role as facilitator. He led an activity to help the task force members get acquainted.

4. Process/Timelines and Ground Rules

Consensus was reached on the ground rules.

Mr. Perry provided an explanation of a process he has used over the years and opened the floor for recommendations of other processes; none were offered.

(SP) This is the task force's process but I will come to the group with recommendations about process. I anticipate there will be homework and study outside the meetings, as well as gathering input and data from your buildings to bring back to the task force; however, the "meat" of the work and the drafting of the policy will be done during task force meetings. Sometimes I will take what you have discussed and compile it for review by the group at a later meeting to see if I am on point or not; this helps move things along more quickly.

5. Information We Will Need

(SP) Portland Public Schools has a model in relation to fundraising for schools that some are considering a national model, and Eugene has a pretty clear process. I suggest considering those models as samples, along with some from other states. Other districts have already wrestled with how to find a spot between two extreme ends of a continuum: 1) every school's fundraising goes into a common pot and gets distributed evenly; 2) parents work hard and want to contribute money to just their school or their child's classroom. A big part of your challenge is to identify whether a spot exists between the two extremes, and then to codify it.

Task force members brainstormed the information they feel they'll need in order to make quality decisions:

- *District and school demographics.*
- *Samples from other districts – comparable demographics and the fundraising impact of policies.*
- *Equity Transformational Plan and policy.*
- *The amount of money spent per child, specifically at the elementary level, including Title 1 money.*
- *The district's definition of district responsibility and whether that basic level is being met.*
- *Base vs. enhanced – operating definition in relation to district funding.*
- *Is sport- or club-specific fundraising part of all fundraising in terms of district policies/guidelines?*
- *The hydraulic between principals' discretionary funds and non-district funds – are there guidelines?*
- *Can we expand this group to include representative diversity?*

- *What is the impact of Title 1 funds on schools and how does that translate to per capita spending?*
- *How the Corvallis Public Schools Foundation works.*
- *Compare/contrast individual school fundraising – history of how the Foundation decides what to use money for.*
- *Coordination of different “asks” – teacher-specific, crowd funding – building “asks” – how does this currently work in the district? How are all these tracked? Which fit within our charge as a task force?*
- *How equitable is grant writing expertise for each school?*
- *If FTE (full-time equivalent staff) are hired with non-district funds, what longer term liability is incurred by the district (PERS, unemployment, etc.)?*
- *How are AmeriCorps staff allocated to schools?*
- *District donation policy – gift acceptance policy – do we take money or not?*
- *Donation policy vs. fundraising policy.*
- *Issue/situation(s) that triggered this review.*
- *Base district FTE for art, library, music, physical education (PE), and the variance beyond that for each school.*
- *Guidelines schools in Corvallis are using for fundraising and expenditures. How much non-district funding is being raised by each school? How is it being used now? History.*
- *How was fundraising impacted in other districts that adopted a new policy on fundraising?*
- *Another level of detail: if we put a plan in place that shares money, then perhaps some schools won’t fundraise as much anymore. If we’re going to look at that, we need to look at it by the socio-economic status (SES) of the students at each school rather than the amount of money.*
- *How much schools are currently fundraising. You need to know basically where the students and parents of those students are coming from, from an equity standpoint, if that data will have any validity.*
- *Clear understanding of what problem we’re attempting to solve.*
- *An idea of the specific fundraising priorities of each school.*
- *PTA/O budgets and what they spend their money on.*
- *History regarding whether there has been a large increase in fundraising for staff, etc.*
- *Examination of whether the newspaper reported fundraising numbers accurately.*
- *Are grant applications being counted as additional?*

(SP) I asked Superintendent Noss if the amount of money fundraised includes grant funds, such as those from the Ford Family Foundation. His understanding is that grant funds are included; any non-district funds that would be used for the benefit of students.

Our PTA made the choice that fundraising through grants is the approach we’ll take rather than asking families to raise funds; it’s a conscious decision because of the expertise parents have.

One aspect that must be considered is that, for schools that have historically been able to pay for additional/enhanced FTE, once someone is hired, the district is on the hook to pay into the Public Employee Retirement System (PERS) for that person.

An artist in residence differs from a teacher in that the artist doesn't get benefits. Before my time there was a lot of "making positions whole" – paying beyond what the district could provide. We realized over time that it's a hard nut to hit every year and that's a lot of money going to one thing when there are a lot of other interests in the school; that's why we moved to hiring outside consultants vs. fundraising for FTE.

Perhaps we could consider designating funds to a district position devoted to grant writing.

When we're talking about baseline vs. enhanced, our art teacher is now funded at .4 FTE, which is less than before. That teacher has to take a cart around to all the classrooms and loses a lot of time unloading and reloading it. That is information that's harder to gather but it's something we need to be aware of.

(SP) When I was superintendent of the Southern Oregon Education Service District, our speech therapists sometimes had to travel two hours to get to the districts they supported; those districts complained that they were getting less FTE than other school districts for the same amount of money.

I couldn't find a district donation policy, which I believe is different than a fundraising policy. Donations are what we're allowed to give, or how money has to be spent vs. raising money. Fundraising relates to the parameters around what we can fundraise for; a donation policy is about what we can earmark money for.

That may be more of a gift acceptance policy, such as "we do/don't accept donation of an automobile."

I've heard that part of the reason this was brought up to the board is because principals don't have the ability to say no to a certain fundraising effort.

We're coming up with the donation policy; we can't control how a PTA/O comes up with the money; we can't tell a PTA/O not to raise money.

PTAs must operate under strict federal and state rules regarding what fundraised money can be used for.

Any school's parents can raise as much money as they see fit. Donations are about what you can give to the school and for what purpose. It gives the ability to say "no, that's not within the guidelines." It's an important distinction that we have to be clear about when we communicate back to the superintendent.

As a teacher, I have had parents donate to my class specifically, although I didn't ask for it; do we need to differentiate that from "I need some money, would you please donate?" Example: the science teachers do a project and ask for money but it's not through the PTA and it's not through the school's basic budget.

I'd like to know about the Foundation's budget, how it works and how the Foundation could potentially help us so we're not in the long run decreasing fundraising; so we could find a way as a community to work together to fill the needs. It's ridiculous that schools are paying for translations.

(SP) Perhaps we could have a presentation about the history of the Foundation, how it works, and compare/contrast with individual school fundraising.

I'd like to know how the Foundation decides what money will be spent on and how things are brought to the Foundation to be funded.

There are channels, such as teachers asking for lab fees for their classrooms, vs. principals asking for funds, vs. PTA/O, vs. the Foundation asking for money.

Crowd funding is done by PE teachers, through their friends and family; should everyone get a cut of that?

It's important to understand the different sources of money; we have to be careful of unintended consequences.

Maybe we need to talk about a limit of fundraising that we're addressing, such as \$25, \$100, etc.

As you get into middle school and high school, there is fundraising for specific sports; is that included? The original fundraising policy includes all of those avenues, but we're very PTA/O focused. My school raises funds specific to outdoor camp.

It's important to list those out and be aware of them. My school can't even raise enough funds to send kids to outdoor school because the parents can't afford to pay; so the PTA pays for that experience. Make sure we're thinking about things in context.

At our school, parents donate extra for field trips for kids who couldn't otherwise afford to go; however, that money isn't counted anywhere.

Our PTA pays for paper so that our principal has more money to pay for FTE; is that a model other schools could use?

That gets back to the interpreter issue; it's very complicated.

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I would like to ask if we can make a conscious effort to have more diversity in this task force. If 20% of our student population is from Latino background, I would like to have more parity on this committee. We don't have any Arab representatives on the task force. I would not want to misrepresent the views of other people. There are so many very important issues. Also, I'd like to have more economic diversity on the task force.

I agree that we need to represent not only ethnic background but also SES.

When I look at the goals and objectives of the task force's charter, I wonder whether there is an order that we need to do things in. And it seems they want a recommendation about whether fundraising can be used for FTE and everything else flows from that. My question is, do we focus on how we provide guidance? At some point, this group will have to make a recommendation and I'm just trying to steer us into getting the most out of our time by getting clear on the goals and objectives.

Are any PTA/Os actually paying for FTE anymore or is there a misconception in the community?

My school's parent group is paying for part of an FTE this year but won't next year.

If FTE can't be paid for by PTA/Os, is there another way FTE would be paid for or do schools just go without?

At my school, we have a very explicit, transparent conversation with the principal about how the parent group can round out the money the school has.

What's the principle – that all schools would have the same things?

It's that we don't feel the district is paying for what it should so schools are having to supplement. We don't feel the district is providing baseline services. It's that we want to bring everybody up to the level that we, as a community, believe every kid should have. The other piece is equity – schools have the same per-person funding for kids who come from affluent families vs. kids who come to school without meals, or who heard a lot of fighting at home the night before, or who don't have a place to live.

We need to be careful; we're working with the school district and the board – they wish they had more money. Over time as they see PTO/As raise money for FTE, it becomes a red flag for them about what needs to be addressed. Our state has a funding problem, it's not the district.

It's the broader education system.

We're also very fortunate that we have some very shrewd employees in our finance department; they have done a great job maintaining our teacher levels at or above most other places. We happen to live in a college town and our standards are a little higher.

(SP) I've identified a quality I call "organizational compassion." Usually people go to a superintendent/district with one issue about their child and they can't see anything else. But when there's organizational compassion, the perspective is, "this needs to be addressed, yet I see you're working under these constraints; so, what I'm thinking might be a way to address it is...." No other district in the state has adequate funding, so your work will involve recognizing the needs of the district.

6. Next Meeting

Mr. Perry noted that the next meeting will be strongly informational. The location for future meetings will likely be moved to offer more access to people with limited transportation resources.

7. Adjourn

Mr. Perry adjourned the meeting at 9:00 p.m.



Fundraising Task Force Meeting Notes
April 26, 2017; 6:30-9:00
Linus Pauling Middle School Library
1111 NW Cleveland Avenue; Corvallis, OR 97330

Throughout these meeting notes, comments of task force members appear in *italic print*; those of the facilitator and identified presenters are in regular print. Unless enclosed in quotation marks, comments have been edited for clarity and brevity. Also for clarity, comments made by the facilitator and/o identified presenters will be preceded with the speaker's initials.

1. Welcome; Review; Binder

Facilitator Scott Perry (SP) reviewed the charter, ground rules and information contained in a binder provided at the meeting. He welcomed Superintendent Ryan Noss (RN) and Finance and Operations Director Olivia Meyers Buch (OMB) to the meeting.

2. Introductions

Task force members introduced themselves as a way for everyone to get reacquainted after the last meeting.

3. Information

A. Corvallis Public Schools Foundation

Liv Gifford (LG), Foundation Executive Director, provided a presentation regarding the history and genesis of the Foundation, as well as information about the Foundation's mission and priorities, programmatic milestones, major programs, pass-through, and a four-year summary of receipts and disbursements.

(LG) My board is beginning a review of the Foundation's mission and has made a shift to encourage more unrestricted donations so they will have more flexibility to address current needs. The Foundation has funded grants at all 13 schools but sometimes all schools don't submit requests. The Foundation's grant committee wishes it could fund every request but they have finite resources; grant committee members depend on the district to give them guidance on priorities. Title schools have surfaced as a greater need than non-title schools; it's just one factor but it's an important one.

In response to a question from a task force member regarding the Foundation's Run For Kids fundraiser, Ms. Gifford explained that the Foundation's Hands Across Corvallis breakfast is a much more successful fundraiser and requires a greatly-reduced amount of work to put on.

(RN) The Foundation's fundraising efforts are focused on addressing graduation rates, and it has really made a difference.

A task force member asked Ms. Gifford what percentage of the Foundation's funding goes to pay for staff of the Foundation. Ms. Gifford replied that there are no Foundation staff positions funded by donations.

Replying to a question from a task force member, Ms. Gifford explained that the reason a larger amount of money goes to high schools vs. elementary schools is because of the number of programs offered at the secondary level, such as credit recovery programs and math academies.

(LG) This year, the Foundation will invest approximately \$20,000 in kindergarten readiness programs this summer. Principals submit proposals for summer programs; the Foundation consults with the district to prioritize.

How do you choose which students are eligible to attend these summer programs? (LG) The district makes the decisions regarding which students attend the summer programs.

Are they for special education students? (RN) There are different programs serving students receiving special education services.

B. District Response to Task Force Questions

Ms. Meyers Buch led review of written materials she distributed of information requested from task force members during the last meeting. She committed to sending the report *By The Numbers* to the task force.

(OMB) The district only keeps paper records for five years, which is why I wasn't able to provide 10 years of data as requested by the task force regarding the money each school received through fundraising, grants and Title 1 funds.

(RN) One of the amazing things about our district is that we are able to provide music and PE (physical education) instruction twice a week and art once a week for all elementary school students. That is pretty unique among districts around the state and is due to our community's passage of the local option levy.

Ms. Meyers Buch responded to questions about the materials. Topics included: weighting formulas for funding; calculations for alternative pathways funding; funding for Muddy Creek Charter School; and funding for special education services.

(RN) When we talk about graduation rates for our students, it's for all students associated with each of the two high schools. College Hill student graduation rates are not split out; they are included in the rates of Crescent Valley and Corvallis High Schools, depending on the enrollment of the students before they started attending College Hill.

C. Brief Review of Oregon District Policies

Mr. Perry led review of a list he'd provided districts similar to Corvallis in terms of demographics. He had obtained the information from the Oregon Department of Education's website. Mr. Perry distributed a chart he created after reading many fundraising policies from other districts. Mr. Perry distributed a copy of the sample fundraising policy created by the Oregon School Boards Association.

D. Debrief Readings

Task Force members shared their reflections on several articles that had been provided to them prior to the meeting.

E. Other Information We Will Need

Task Force members shared their requests for additional information.

4. Next Meeting: Information and Brainstorming

(SP) At the next meeting, you will process the answers received from Ms. Meyers Buch. Also, you will review the district's equity policy and develop some agreements about basic elements to include as you brainstorm ideas for a fundraising policy.

5. Adjourn

Mr. Perry adjourned the meeting at 9:00 p.m.



Fundraising Task Force Meeting Notes
May 17, 2017; 6:30-9:00 p.m.
Linus Pauling Middle School Library
1111 NW Cleveland Avenue; Corvallis, OR 97330

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1. Welcome; Status Review

Facilitator Scott Perry (SP) led the group in a quick review of the task force's charter and ground rules. He set the stage for the evening's meeting, and outlined his vision for the next few meetings. He welcomed Superintendent Ryan Noss (RN) and Finance and Operations Director Olivia Meyers Buch (OMB) to the meeting.

2. Introductions

Mr. Perry asked task force members to share their hopes for the results of this process.

Really define strategies to support educational learning across schools, and that all schools are supported.

Really build alliances of PTA/Os among schools. This policy is a start but it's important to have things emerge at a grass roots level.

Increase collaboration and sharing among all schools. Also, recognize that some of our communities need more assistance than others and have an honest conversation about that.

I'd like to assure that our parent fundraising doesn't lead to inequity, and also have as much fundraising as possible because many of our schools are strapped.

Promote sharing – that's a really good place to start.

Ultimate goal should be to benefit all K-12 students across the district with as many engaging and enriching opportunities that address as many learning styles as possible.

My hope is that we are able to make decisions that will foster long term benefits for the community that go beyond our own kids.

Come up with a comprehensive policy. There's a lot of talk about the FTE (full-time equivalent staff positions) issue and my school gets singled out. But we don't really spend much money on FTE. I'm concerned that if we get stuck on that track, we won't get very far.

My hope is that we can really promote and increase fundraising across the district without hurting any population or group in the process. I also hope we can make decisions based on data and then be able to communicate afterward why those decision were made. It's a pretty hard sell without it.

Doing something here that matters will be the best outcome. This is a good process and I'm proud of the courage that the superintendent and his staff have to include so many people in one committee. I'm sensitive to the members who want to support their schools. I'm curious about the legal consequences if the money donated to a school would be diverted.

Make all the PTA/Os happy. Also see if we can find ways to get the community as a whole to give to all schools, especially to schools that aren't able to raise much money.

(RN) I haven't been able to find someone to join the task force who would represent families navigating poverty. It's an important voice but I am concerned about bringing someone new in at this stage of the process because there is so much that person would have missed.

A couple of task force members offered to reach out to people they know. Facilitator Perry offered to bring a new person up to speed. Superintendent Noss said he would continue trying to secure someone.

(RN) When I attend task force meetings, I feel some excitement because all of you have schools, families and staff to represent. I see this as an opportunity to continue to build common perspective and language but at the same time an opportunity for you to share your own perspectives. Ongoing conversations between parents from across the district doesn't happen very often; I look forward to the work the task force will do through this process.

(OMB) In the end, we'll be creating more opportunities for kids – whether to go on field trips, receive supplemental instruction, or gain access to athletics or activities. This task force can do their work in such a way that people won't be turned off to donating.

3. Information Questions We Still Have

Mr. Perry distributed a summary of his interview of Rosemary Schwimmer, Manager of Parent and School Engagement at All Hands Raised/Portland Public Schools Foundation, regarding Portland Public Schools' Parent Equity Fund.

(SP) Every Portland public school has a PTA/O but also has its own foundation under the All Hands Raised umbrella foundation. National guidelines for PTA/Os prohibits fundraising to pay for FTE; however, foundations and other non-profit organizations can.

Mr. Perry highlighted some of the information contained in the report.

What is the distribution of fundraising in Portland Public Schools' PTA/Os – how much are they raising separate from the foundation vs. what they're raising through their own foundation? And what are they raising funds for? What roles do the PTA/Os play and how are they using their funds.

It's so hard to find people to run PTA/Os in our schools, I don't understand how Portland Public Schools can find enough people to run two systems. Do they have separate boards?

I'm surprised by the way we are approaching this. It's interesting that we aren't focusing on the goals and objectives and then figuring out how to achieve them. We need to look long term. We need to look at what kinds of learning opportunities we want for our kids and find out how to make that happen.

The heart of the issue is about how much money each school is raising and how they're spending their funds. Jefferson's PTA gives money to the principal for things she needs so she has more flexibility with how to spend her discretionary funds. It's disturbing to me that some schools use their funds to purchase snacks and books. And we haven't talked at all about the high schools, which I've heard are really a bear.

I'd look at the schools and the academic achievement we want for our kids, such as all kids by grade 3 should be able to read at a certain level and do a certain level of math. We are on the wagon about raising money and that's the objective. I don't see a more clear direction and reasons for raising the money. Perhaps we would fundraise in a completely different way if we had a clear idea of what the money will be used for. We need to look at the learning objectives; they may or may not coincide with assessments of benchmarks that are in place. Once we are clear as to where we want to get, then we assess where the kids are and we would do whatever is needed to ensure that all kids get to the same level. Feels some people are hesitant because it's not clear.

I like the idea of using this task force to create an equity fund to achieve the district's equity goals and goals for academic achievement.

I feel it's a little bit of dicey territory to look at parent-raised funds to get at academic outcomes. Fundraising should be for things beyond reading and math – so kids have access to things that have fallen away as our funding has been stripped away to the bare bones, such as a school garden. This task force is looking at what schools are doing to raise money above and beyond what's being provided by the district, and what schools are doing to reach kids. And so the schools that aren't able to raise much money don't have access to those enrichment opportunities. I would be curious to see how different schools raise money and set goals. What do they do to raise funds? And what are they spending their money on? Do they have a plan?

Corvallis Public Schools Foundation Executive Director Liv Gifford (LG) said the Foundation has looked at that and it runs the gamut.

(LG) We have the level of deliberations and intentionality happening at the foundation level; the district is constantly looking at how to reach all students. I read a study that graduation interventions are extremely successful at the high school level. What this group is trying to deal with is the additional level of fundraised money that is not equal across the district and is causing a gap because discretionary budgets are so tight. Some schools are using fundraised money to pay for interpreters and food and childcare as a way to reach more families. They don't have the option to pay for other enrichment; however, the schools that can raise \$60,000 do, and what surfaces are extra art, PE, and librarian time. We're talking about what we are doing about that and whether or not we feel comfortable with what's being done now.

I'm just curious if there's more success in fundraising at certain schools because the PTA/O understands what the needs are. If a PTA/O needs to pay for interpreters and snacks, then perhaps the district should pay for those so that the fundraised money can go to extra things. The heart of the equity issue is to make sure that all kids have food to eat, etc. There are great differences at each school and it feels hard to me to develop a top-down strategy. I'm curious how the PTA/O funds interact with the discretionary funds; our principal gives a presentation at our meeting about what she's spending her money on.

Our PTA/O doesn't have any wiggle room to give money to the principal so she has more flexibility with how to spend her discretionary funds. We regularly turn down teacher funding requests that are core to the key academic success because we can't afford it. We have made a commitment that parent engagement is a top priority for our PTA/O so we've been spending our funds on translators, childcare, etc. but every school looks at parent engagement in different ways.

(SP) Ms. Gifford and Ms. Meyers Buch provided a lot of data at the last meeting regarding money and finances, which left me feeling a little overwhelmed. Visuals are helpful for me, so I prepared a chart with the data that had been provided at the last meeting. I wanted members to have a lot of data about the money piece in one page.

Mr. Perry explained the information on the charts and said his thought was to have task force members spend time reviewing the data to see what sorts of things jump out at them.

Some of these numbers represent extra enrichment activities for some students but not all students have access to that enrichment.

My point is that schools shouldn't have to raise funds for the basis.

Do people feel like the district should pay a lot more money to the low SES schools? It doesn't feel like giving a lot of extra money to poorer schools is the answer because then other schools will say that's not fair.

Outdoor School fundraising isn't included in this chart – there is a lot of unmeasured fundraising.

For Franklin's DC trip, students start fundraising in first grade. Every kid goes to DC whether or not they can afford it; parents whose kids have already graduated call us and ask who needs money and they write a check for it. Part of the cost is paying for the teachers to be able to go.

It just highlights the different home and educational experiences. This is just one drop in the ocean.

Without redistricting the whole city, we have a huge inequality in SES.

It's a choice to go to Lincoln and Garfield because of the model and the additional support but that's a difference piece of the conversation.

After task force members took a short break, Superintendent Noss said he's been taking in all of the comments offered by task force members.

(RN) One thing that comes up for me is that we have a goal in mind and a purpose for us to come together but we also have other things that need to happen. Conversations about how principals spend their discretionary funds need to happen but a conversation about how we all work together as schools also needs to happen. I just don't want those parallel conversations to get lost as we focus on creating a policy to recommend to the school board.

4. Corvallis Policy & Plan Regarding Equity

(SP) I want everyone to understand the district's policy on equity. The task force's charter stipulates that our work is supposed to align with Policy JBB – Educational Equity.

5. Implication of Equity Policy for Our Discussion

Task force members split into pairs and discussed how Policy JBB relates to the topic at hand in terms of the equity in fundraising. Mr. Perry asked them to answer, "What do you see as the implications of this policy on the work of the task force in terms of the charter and the charge; what are the implications and what are the connections with our work?"

Does what we're using to measure assessments reflect our diversity? STAR assessments are only given in English. If we think it's important for some populations to be taught half of a day in English and the other half in Spanish yet we're only measuring them in English, how is that equitable?

We are trying to decide how the funds that are raised are going to be spent. It would be policy that the assessments used and the teachers represent the student body. The money should be spent to ensure this is happening.

The money should go toward any institutional barriers that are identified as causing inequities.

Differentiating resource allocation and looking at how the federal government allocates Title funds. Our district also weights discretionary funds for schools that need it more. So now, the next step is community involvement – recognizing the variety of needs and allocating funds.

And it's not just about money it's about building collaboration and communication amongst schools, and creating new opportunities for partnerships and collaborations.

This task force grew out of the equity policy, so we're mandated to address inequities in fundraising, as best we can.

If the idea is for every student to have experiences that are "level A", that if one school is moving into filling into "level B" we have to figure out a way that every school is getting to "level B." What we're supposed to be doing here is figuring that out. What's complicated is that the way to measure it is by money.

Not exactly because if students are hungry, fearful, disenfranchised, schools can bring the best science experience but the students can't participate because they are so deficient in those areas. You have to get to "level A" before you can proceed.

So there are underlying resources that are needed to get kids ready to experience it.

Right. Like giving a child a peanut butter and jelly sandwich before the science night so that the child is alert. So how are you going to measure that? Are graduation rates enough?

I feel we have an obligation as a community to be sensitive to the need for resource allocation that addresses the needs of our whole community. We've been given this opportunity to give input to the board and they're going to proceed with this probably regardless of what we say; we need to support them in this layer of fundraising. They need some assistance figuring out how this policy manifests across fundraising.

Mr. Perry asked Superintendent Noss to share other thoughts he may have from district perspective, and from the perspective of the leader of the district. Superintendent Noss read aloud the first paragraph of Policy JBB and said it stands out for him the most.

(RN) My role as superintendent is to work toward the ideal of the policy and to identify traditional barriers that were put in place – often without realizing it because it's just how we experienced school – as well as to identify the things that are getting in the way of families. At least a year and a half prior to the adoption of this policy, there was conversation underway about developing an equity policy. Drafts were rewritten three or four times with input from the board. It wasn't just a policy that was adopted because it came to us, it was adopted because it was aspirational and a way to clarify those things that will allow kids to move into the world and have opportunities. This policy drives our work more than just about any other policy.

Regarding cultural expertise referenced in the policy, have you seen a shift in the district so that there are more agencies involved? Are there people in place who are looking out for those kids who need food, shoes, rides, lunch, etc.? How do we identify those kids who really need that kind of assistance?

(RN) DELT/A, the district's equity leadership advisory team, includes parents of color from each of our schools. That group met three times this year and will continue to meet next year. The group will be asked to tell us what we got right and what we need to improve upon. Also, Marcianne Rivero Koetje, Equity and ELL Coordinator, has developed really strong connections with several of our Latino groups, and I have had meetings with members of the NAACP (National Association for the Advancement of Colored People). We are hearing from families who have encountered these barriers.

Health Navigators are another really good example of outreach, to families of kids who deal with medical problems that interfere with their ability to learn.

6. Next Meeting: Brainstorming and Choices

Mr. Perry gave the group a homework assignment: come to the next meeting with some rich brainstormed ideas of things to include in the policy or administrative regulation, as per our charter and in terms of the expectations of the board. He shared his idea for basic guiding goals, and asked task force members to bring ideas that meet these goals.

7. Adjourn

Mr. Perry adjourned the meeting at 9:03 p.m.



Fundraising Task Force Meeting Notes
May 31, 2017; 6:30-9:00 p.m.
Linus Pauling Middle School Library
1111 NW Cleveland Avenue; Corvallis, OR 97330

Throughout these meeting notes, comments of task force members appear in *italic print*; those of the facilitator and identified presenters are in regular print. Unless enclosed in quotation marks, comments have been edited for clarity and brevity. Also for clarity, comments made by the facilitator and/or identified presenters will be preceded with the speaker's initials.

1. Welcome

Facilitator Scott Perry (SP) asked task force members to share their hopes for tonight's meeting.

I'm concerned about the lack of Latino representation; I would be happy to find someone to bring in.

Maybe we can have some community outreach or surveys, before we go to the board, of the communities that are most underserved, and ask if they think this would level the playing field or give more opportunities, etc.

I preferred that someone could have been given the same opportunities that the rest of these task force members have had.

This should be a priority for all of us. I feel like we were told to let the district find someone, so we stepped back. I feel we could bring someone in right now and get them up to speed. I don't think this should be an exclusive group. I want to acknowledge that it's not just on member's job to address this alone.

Do we think that if we had better information or more voices in the room, that we'd come to different conclusions about how we'd distribute fundraised funds?

One of the solutions to the problem was partnering schools to replicate successful programs. Another possibility was to pool money into the foundation and have them distribute it to the schools as deemed necessary. Also, the district could take it all and distribute it as it sees fit. I'm never going to know enough about other schools to be able to say that I know what they need. Even if we could get to that level for all schools, those needs could change each year. You kind of need to be there to find out what programs are working, etc.

(SP) This issue is so complex that it's unrealistic to think that one set of meetings would be all that was needed to come up with the perfect solution that will last for the next 50 years. Instead, the group could come up with several recommendations, one of which is to continue gathering and studying data over the next year, and revisit the process next May by convening this group or a group like it. Also, this process could be extended to additional meetings.

I feel that I gave enough time for the steps to be taken to get someone on the task force. My other opinion about Corvallis is that it is as close to heaven as we can possibly be; we have the hearts and minds and community resources to make the best things happen. So my comments come from that frame about the community. I believe the decisions we make should be night and day different if we had more information. You would be thankful that you had that knowledge and you'd be willing to spend more time getting those facts. And it would make a difference in how you approach this process. We have experts in the community that have done studies and presentations on this subject; we wouldn't need to start from ground zero. It would be sad for me if that process were not followed; it would change the image that I have of the school district and the community.

(SP) Perhaps we should bring in an expert to present information, and then add another meeting to finish brainstorming.

We could say that it's an expectation of ours that there be additional people at the table to help us get through the rest of the process.

We need to identify what we want more information about and then task ourselves to go out and find it, yet move forward with the rest of the plan today.

I like that and wonder if we could take advantage of DELT/A. But there had been concerns that the group wasn't representative of all schools. That group might be interesting to collaborate with.

(SP) There are two things to think about if we're going to be providing a short list of recommendations and a process recommendation for continued engagement by the district over time. That could allow bringing this task force and DELT/A together; doing deep level work to develop new levels of understanding. In the next two meetings we can't get there but we could make recommendations to have that happen.

For me it would be presumptuous to provide recommendations without additional information.

(SP) Would you be willing to listen to others' ideas and then help arrange for a presentation at the next meeting? Then we could finish the brainstorming process after that.

To me, that idea resembles a person who's sick but the doctor hasn't identified what's wrong with the patient yet is trying to find out what medicine to use. I would not feel OK with sending recommendations and waiting for a future group to address the needs by getting more information. I believe we need to be the first step. I know someone who would be able answer your questions and also be a part of the committee if you'd like. He wouldn't need to obtain all the background. But he doesn't represent low SES (socioeconomic status).

(SP) How do the rest of you feel about inviting someone to the next meeting to present and sit through the brainstorming process, then remain with us for the rest of the process?

If we're going to open this up, we need to make sure that we have low SES representation because I wouldn't be at my best for brainstorming without it.

(SP) My understanding is that the next meeting will be devoted to educating the group on the issues of Latino and low SES, as well as uncover every stone we could to find someone to join us on the committee that would represent/have expertise with low SES and the Latino community.

Names of possible presenters were offered.

Maybe we could have representation from someone in addition to the Latino community. Hearing from someone who's feeling more alone and that they don't even have a cohort, asking if the activities in the schools are meeting their cultural needs and their voices.

The definition the district came up with for equity is that everyone has an equal chance of graduating. So, we should look at the demographics of people who aren't graduating and find representation for them.

(SP) Perhaps we could have presentations covering three perspectives: economically disadvantaged, the Latino culture, and other cultures.

I worry about the practicality of trying to get two more meetings in by June and I also don't want to overlook the expertise in this room, even though a lot of us can't identify as people of color or of low SES. Do you think we are well-enough informed with two or three presentations, or do you think it'll take more and more presentations?

My answer is we'd be better informed than we are today. And yes, it's expensive for the district but it's time for us to make the effort for them.

And we have to continue learning all the time and I believe there are other ways to do that besides just presentations; we could talk to people in our schools, etc. I agree that we need to move forward in pieces and not waste the resources we have in this room and not just rely on the district – put our money where our mouths are and seek out those people. Not to mention that students with disabilities are not graduating in high numbers, and there are families in crisis even without SES.

Consensus was reached to add two additional meetings, with the next meeting dedicated to presentations representing the economically disadvantaged population, Latino community, and other cultures. The meeting after that would be brainstorming, and the final one would be to finalize the recommendations.

2. Review of Charter and Group Agreements

Discussion took place regarding task force members' level of clarity about the charter, and the group reviewed the group agreements they'd implemented at the outset of the task force's work.

3. Review New Information

A. Student Performance Data

Mr. Perry distributed information regarding student demographics, achievement, and graduation rates.

When we talk about graduation rates, it's important to note that the options for graduating/getting a diploma changed part way through the years reflected in this chart. There are five forms of diplomas.

Discussion ensued regarding dual language immersion (DLI) performance trends and how they're usually outperforming their English speaking peers.

But that report about DLI doesn't take into account economically disadvantaged status.

I'd like to bring our attention back to this group's charter, and to the scope of the district's budget and the percentage of the fundraising money in comparison to all of the money going into the schools already. My school has divorced what the fundraised money pays for from the academic experience and put it into whole experiences.

I echo those sentiments. We are talking about really small amounts of money and a really small nexus of what we can do with those funds across the district. My mind goes to the enrichment opportunities and how we can make those more equitable for all students.

I think we're minimizing \$50,000. Principals' discretionary budgets are in the range of \$70,000-\$100,000.

We have to be realistic that we're not trying to fix test scores. I keep going back to how we tell the story of what is happening in every school so everyone can get on board with it. Our incoming PTA president's first question to me when she found out I was on this task force was "we're not going to have to give our money to the district, are we?"

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B. School Fundraising Activity And Expenditure Purposes

Mr. Perry distributed a document with responses he'd received from principals after they were asked to respond to three queries: describe the fundraising your school has done this year; describe any formal or informal guiding principles that shape the fundraising work in your building; describe what this year's fund-raising dollars have been used for or are intended to be used for.

4. Brainstorming Options

Mr. Perry asked the group to brainstorm ideas that met the following criteria:

- A. Works to help provide all Corvallis students with access to an equitable full spectrum of quality education experiences, no matter which Corvallis public school they attend.
- B. Fosters a fundraising system that does not lead to a decline in voluntary contributions from non-public school funding sources.
- C. Clarifies the rules related to use of outside (non public school) resources to hire FTE (full time equivalent staff).

Mr. Perry distributed copies of ideas that had been submitted by task force members prior to the meeting. The group took some time to read the submissions.

Discussion ensued regarding the purpose of the task force and the scope of the work, as well as the genesis of this task force.

I challenge this group to get uncomfortable – to talk about the uncomfortableness of kids who can't have access to the same experiences.

5. Adjourn

Mr. Perry adjourned the meeting at 9:02 p.m.



Fundraising Task Force Meeting Notes
June 5, 2017; 6:30-9:00 p.m.
Linus Pauling Middle School Library
1111 NW Cleveland Avenue; Corvallis, OR 97330

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1. Welcome and Introductions

Facilitator Scott Perry (SP) thanked the presenters for being here on such short notice. He reviewed the group's charter and provided a synopsis of the task force's work to date. (SP) At the last meeting, you had agreed to pause the process and really go deeper to enhance our understanding of what some of the groups in the Corvallis School District experience.

Mr. Perry read the opening paragraph from Policy JBB – Educational Equity and said tonight's focus is about better understanding the barriers that students and their families face. He noted three questions the presenters had been asked to address:

- Our desire is to become more sensitive to, and understanding of (Arabic, Latino, economically disadvantaged) students and families in our schools. Can you describe some of the experiences and challenges often faced by families and students as they work with our education system?
- Can you also help us understand the kinds of things effective schools can do to successfully support families and students in our education system?
- What else might be helpful for us to know and understand as we work to develop policy and process recommendations for the school district relative to equitable fund-raising practices in our schools?

2. Guest Presentation: Perspective of Arabic Students and Families – Khalidah Daod, Corvallis School District Student and Family Advocate at Garfield and Adams Elementary Schools.

Khalidah Daod (KD) gave a PowerPoint presentation. Some of the information she provided included:

- 12% of Muslims are Arabs, but 90% of Arabs are Muslims.
- The Islamic religion affects every aspect of Arab life.
- Food that can't be eaten (pork products), a person's outer appearance, the language barrier, and the culture – all those are difficulties Arab families need to work through.

- School lunch carts now display a cartoon of a pink pig to indicate which foods contain pork; that has eased parents' fears.
- Most Arabs can read and write English but don't have the ability to communicate verbally in English.
- The Arab school system is very different; students memorize from the teacher's lecture and from the book. They have lots of homework.
- Parents don't realize there's a difference in the Corvallis school systems, and they get nervous when their kids don't bring homework home or don't memorize things.
- In Corvallis, we have adult supervision all the time on school playgrounds; Arab students don't have that kind of supervision on the playground; so, kids have to defend themselves and stand up for themselves, otherwise they'll come home beaten up. So we have to retrain the kids to address that difference now that they're here.
- This past year was very hard for Arabs and Muslims in terms of prejudices and stereotypes. Kids listen to what is on TV about Muslims and non-Muslims; there has been a lot of conflict among the children at school.
- The media is not very fair to Arabs or Muslims, and no matter how much we try to keep it at home, it comes to school. I've seen 1st and 2nd graders talking about war and fighting about it.

Ways to provide support:

- Visit the Islamic Center. It brings the two cultures together and is much appreciated by the people at the center.
- Invite Muslim speakers to talk to students. We have so many moderate, educated men and women in the Muslim community and a lot of them are willing to do this.
- Invite parents to read books and stories from the Middle East.
- Familiarize students with Middle Eastern culture through music and photos of Middle Eastern countries. That will make it a little easier for kids to get along.
- Talk to students about biases and stereotypes. Sixteen students at Garfield have an afterschool activity pilot; it's working and parents are very excited; now they are collecting names and signatures to make it bigger.
- Open a discussion about the Hejab (a covering for the head and face, worn by Muslim women) facilitated by a teacher or a guest speaker to help kids understand.

How to help students be successful:

- Explicitly share rules with parents; send home information translated into Arabic.

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- Package for newcomers and parent orientation and some sort of curriculum to help the children get up to speed with the other children.
- Workshops for parents and family nights. But that requires money.
- English classes for parents. Parents are intimidated to come to school because they can't speak.
- Face to face communication. It's very hard for parents to speak on the phone; they use a lot of hand gestures when they're in person.

Prejudice and stereotypes:

- I was scared to go to work after 9/11 because I felt it was my fault. It's also hard for kids to deal with that.
- Teachers need to be prepared to respond quickly and clearly to harassment and bullying. Take care of it right away; don't put it off.

Needs:

- Education – seminars and workshops focused on anti-Arab/Muslim issues.
- Parent outreach – educate parents about their rights and how they can become advocates for their children. I talked with one mom whose son was harassed but she told her son to just keep quiet because they might go to jail.
- Teach parents to stand up for their kids and defend them, not just keep a low profile.

(SP) Are there more Arab students in some schools or is it pretty much even across the district? (KD) They are mostly at Adams, Wilson, Garfield, and Lincoln Elementary schools but we have Arab students at Cheldelin Middle School and Corvallis High School (CHS). There are only two of us on staff to help the Arab kids – we each have two elementary schools. There is no one to help Arab kids at Cheldelin and CHS; we get called to those schools but don't have enough time to help everyone.

At my school, there are two or three Arab families; do they have access to you at all? Does the principal have access to you? (KD) Most of the schools have my number; most of the families know me personally and would contact me.

Was the coding of the pig for lunches district wide? (KD) It's limited to just one school; but I'm hoping it'll be done for other schools to let kids know there is pork in the meals – especially for the little kids.

I've seen the Arabic class at Garfield – are they wanting it to be a club for Arabic speakers or do they want English speaking students? (KD) It's just at Garfield but I'm hoping it will

become bigger and move to the Boys & Girls Club. A lot of non-Arab families want to enroll their kids in that class but it's very limited because there's only one teacher.

Are most of our Middle Eastern students Arab? (KD) The term "Middle East" is used to refer to countries that don't speak Arabic; but most of them speak Arabic. Kids from Afghanistan and Persia don't speak Arabic, nor do people from Iran or Turkey.

Can you talk about Muslim vs. Islam? (KD) Islam is the name of the religion and a person is Muslim, like a person is a Christian.

The Islamic Center sounds like a really nice hub for Arab families coming here. Is there a way to communicate to families how to get enrolled in school, grocery shopping, doctor offices, etc.? (KD) The Islamic Center helps but I hope that schools will help also – to have a connection between the center and schools.

Is there a way for the district to translate all documents into Arabic, like they do for Spanish? (KD) I wish there were some connection between the Islamic Center and the district; there are people willing to help the district. We have done a lot of translation but maybe we need to do more.

When families that are Arabic speaking come here, are they coming for OSU graduate programs? Or due to difficult situations in their countries? (KD) Both; there are OSU students and also refugees.

The main focus of this task force is for parent groups to enhance educational activities through outside funding. In terms of finding ways to bridge the gaps, are there things PTA/Os should be doing differently, either during the school day or after school, to make sure that things are welcoming for all? (KD) Arabic families are OK with after school activities as long as they don't run too late in the day.

Will Arabic families have anxiety about participating? Should we have a welcome night to make them feel comfortable? (KD) When Arab families are invited to events, they talk to me and tell me what they need; I tell them to come to the gatherings but they get nervous and they don't talk, so it's not easy. Last year we had a gathering and it was very successful; after a bit, everybody relaxed and asked for what they needed. I hope we have more of that.

(SP) Is there anything you wish for to break down barriers for Arab students and families, but which can't happen because it would require extra funds? (KD) The Arabic class that was started is important so students don't lose their mother language; parents don't want them to lose that. Also, English classes for parents would be good; that builds a bridge and it will help them a lot.

3. Guest Presentation: Perspective of Latino Students and Families – Rocio Muñoz, Garfield Elementary School PTA Co-President, and Garfield parents Maria Luque, Natividad Sanchez, and Gabriela Castro.

Some of the information the speakers provided included:

- Garfield received a grant from the Linn Benton Health Equity Alliance in January to support capacity building of Latino parents to get more engaged in school, to be volunteers and to learn about what happens in school.
- We've been meeting every Friday morning since January, talking about different issues that are important to parents and connecting with the schools in order to be more engaged in school functions, like volunteering in the classroom or at school-wide events.
- We've been learning a lot about things happening in the district – fundraising task force, facilities committee, wellness committee, etc.
- A lot of what Ms. Daod mentioned is very similar for Latino families.
- Some have been here for 15-20 years and some have come within the last 5 years.
- Many are coming from rural Mexico for a similar reason: economic hardship.
- There are some that have no education.
- I've heard mixed comments about what the needs are for Garfield.
- I can speak for the needs of Lincoln because the Health Navigator assigned there has shared them with me.
- There are three Health Navigators in the district; all are bilingual/bicultural.
- Health Navigators act as cultural brokers between parents and the district system, and connect families with outside resources.
- I'm overwhelmed by the amount of need, even today.
- Garfield families' experiences are similar to those of the Arabic families.
- We are all very grateful for this system and don't ask for more because what we have here is so much more than families could get at their home country.
- Garfield is a school of the world but there are a lot of needs.
- I have a daughter at Garfield. Everyone treats my daughter well, but when it comes to her grades, I am extremely disappointed and surprised at the end of the school year. Throughout the year things appear to be OK but when it comes time to look at the grades, things are not as they appeared.
- The English track is going at a good pace but it's the Spanish piece that seems to be a little slower, and we're not sure why.

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- The greatest challenge I have had at Garfield is with special education services. There aren't any teachers trained for the children. Ever since my son went through the education system and I saw how he was treated, I've become more involved and volunteer and make connections.
- I think the problem is that maybe the teachers think they speak good Spanish but they're really not very well prepared and it's a very big problem. The PTA has tried to raise funds to help, but it's very difficult.
- One of my greatest challenges is math due to the differences in what I learned in Mexico. There are always challenges, especially since the school doesn't send homework. I didn't receive any support at Garfield for that problem. My husband and I were able to explore ways to better support our daughter and now she's in advanced math at Linus Pauling Middle School. But I have another child at Garfield has another child and would really like to receive support for math.
- I want to piggyback onto what Ms. Daod said about providing more opportunities for learning about different cultures, traditions and languages. I feel that the extra things that may seem to be enrichment are really academic for our families; ways to learn about our culture and history.
- I want my kids to see themselves represented in the books. I feel like we have a shared mission.
- I want to highlight that our Spanish teachers are not well prepared. I would really like to see native Spanish speaking teachers. Our native English speaking teachers teaching Spanish are probably correct but they lack the piece around the culture and the role modeling.
- The PTA has worked really hard to provide those cultural and heritage opportunities but our funds only go so far.
- One thing we're not addressing is tutoring for after school programming to address the need for math and reading situations that our students are facing.
- Spanish speaking parents don't know who to go to for addressing the academic need.
- As far as the PTA and fundraising, I feel there are opportunities to do shared experiences, especially when it comes to heritage and culture.
- The sense of belonging for Latino families is important. Our PTA has been writing a lot of grants but this year we're going to ask the district to help out.
- Art, PE, etc. are enrichment opportunities but our school can't raise as much as other schools can.

- I really feel that we need to take into consideration that a lot of the needs at Garfield and Lincoln are academic in nature. We haven't addressed the academic gaps and we haven't addressed appropriate retention and recruitment of teachers.
- Garfield's Gecko Club has tutoring after school but it's not individualized and it doesn't teach what is being studied in the classroom. We could strengthen that piece and approximately 25% of Garfield students could benefit from it.
- Casa Latinos Unidos de Benton County received a grant to provide tutoring. If we could have Latino/a volunteers help out, they could serve as role models so our kids could see "I could go to college."
- My daughter receives special education services. Being a newcomer and learning that whole process was overwhelming. There's no follow-through on IEPs or there are things that don't work for kids; it's very frustrating. Sometimes the interpreters aren't providing adequate interpretation.
- I am also an interpreter and translator and have provided support for some of the parents at Garfield because I'm a member of the PTA. I have attended IEP meetings and the interpreter misses the meaning of the conversation. I consider myself a cultural broker. I help the Health Navigators with appropriate language specific to IEPs.

Are you surprised at the end of the year because of the special education situation? I'm not sure what the reason is; I try to ask questions and be involved but it comes out so-so in the end.

With my son, classroom teachers aren't very well prepared or patient. They pull the kids aside for an hour and we feel they're missing out on what the other students are studying. They don't learn from the smaller groups nor from the general classroom; so, instead of growing, they level out. *Why are they pulling them out?* Supposedly the group is for special education. *Is there a bilingual special education teacher?* We might have one teacher.

They speak Spanish but not as effectively because they don't have the cultural piece? One of the things that really worked for me is that I asked my husband to go to all the meetings because he speaks English very well.

Is there a family advocate like Ms. Daod for Latinos? We have Latino family liaisons at Garfield, Linus Pauling and CHS but the type of support is more for events rather than for advocacy as parents in the school. It seems like that needs to be re-examined.

Going back to the charge of this group, my PTA made an explicit decision that we're not raising money for things that are technically academic. We have a math club and we pay stipends to our teachers. It doesn't track with what is in class – it's "math is fun" and it's to spark their excitement. I'm hearing from you that there are core basic needs that the district

needs to provide more of so the parents can provide more things like technology club and garden club, etc. I'm trying to figure out how we can better support the basics so the grant monies are giving every kid the opportunity to have a garden club, etc. The parents I've talked with want to provide money for the things that the district can no longer support but which we remember from when we were kids.

What are on your wish lists? Recruitment/retention of teachers; tutoring after school; reduced class sizes; more support for teachers in classrooms; to have special education teachers better prepared to be in the classroom because they're usually stationed in the LRC and separated out; general education teachers who are better trained in special education; more exposure to heritage experiences and more field trips. A lot of our students have never been to OMSI or the coast – they have never left Corvallis. We will continue to fundraise but we can only raise to a certain point. We can't raise enough to have a technology club. Some of our kids are eating three meals a day at Garfield. A lot of the affluent parents are doing the fundraising; parents who are disadvantaged can't fundraise but are willing to do the labor for it, such as prepare tamales for sale.

What percentage of the Spanish speaking parents/students are of Mexican heritage vs. Spanish heritage? Maybe part of the culture and heritage piece should be addressed. A lot of our Spanish teachers are teaching Spanish vs. Latin American. I want to highlight that just because a person is from a Latin country it doesn't mean that person is a native Spanish speaker; Mam is the indigenous language that many families are coming to the country with as refugees.

Mr. Perry asked the presenters if there are any other messages they want task force members to hear from them. The presenters responded that there is a spectrum of affluent parents who want enrichment and very, very, very poor parents who don't know what to ask for because they're so grateful just to be here; and, there are people in the middle. The affluent people have a choice, they have the privilege to choose; so, have parents check their privilege. There are very, very rich people and very, very poor people in this community.

4. Guest Presentation: Perspective of Students and Families With Economic Challenges – Chris Hawkins, Corvallis School District Crisis Response Coordinator and Support for Students in Need.

Chris Hawkins (CH) provided a PowerPoint presentation. Some of the information she provided included:

- “Homeless” families aren't the people you see sitting outside of Safeway or the Post Office. There was a family that had it all together: a home on the coast, both parents working, etc. but the mom got sick and could no longer work.

- The KOA campground kicks out everyone on sporting event weekends because they can get more for their camping spots.
- Shelters don't allow families in until 5:30 or 6:00 p.m., so kids need somewhere to go after school.
- The district's Backpack Food Program is completely donation-based.
- Homeless families move around a lot, so we provide transportation for them to be able to remain at their school of origin through the end of the year.
- When kids are homeless, it's tough for them to connect with their classmates and to feel normal.
- We need to educate our community on the level of homelessness in our community.
- All of the things we do are on a year-to-year basis because the funding changes every year.
- The homeless situation is not getting better; people don't realize that because they think since the economy is getting better, homelessness is getting better. But it's not.
- It's tough to find apartments and low-income housing in Corvallis.
- Corvallis is a tough town – we have the richest of the rich and the poorest of the poor.
- We are doing a better job of identifying kids and getting them supports; graduation is their key to getting out of the cycle of homelessness.

Is there something for this group that you'd like to see – activities/programs at schools, or an expansion of something? (CH) In my world, it would be great if I had funding from every school to just send kids blankets. I feel strongly that our community should help and I don't see that happening.

How do you figure out the budget? Is the Foundation earmarking a certain amount? Liv Gifford (LG), Foundation Executive Director, responded: We're watching the needs of the homeless program grow. We have had an anonymous trust for homeless education that ended last year, so we've budgeted \$11,000 for next year.

(CH) I do a lot of public presentations and Carolyn Hinds has done a lot of public education. I speak to churches on Sundays, appealing for help.

(LG) A lot of donors specifically support homeless students.

What is the percentage of people who are like the rest of us in the room, vs. in cyclical poverty? (CH) 20% of our families are second-generation poverty; the rest have just been hit with unfortunate circumstances.

What's the Foundation's budget? (Gifford) The homeless education program has needed \$35,000-\$40,000 per year to run; we're working together to make sure that amount is there.

(CH) And that figure doesn't count the help the Corvallis Odd Fellows gave us with the backpack food program.

Does the district provide any funding? (CH) Our district is one of the few that has a person in my position; I meet families at shelters and find out which school best fits the family.

Would you be willing to come to schools and give this talk? (CH) I would love to.

Do you have a brochure like the Foundation has with a portion we can tear-off for donating? (CH) That's my summer project.

If you have information, we would be happy to include it in the packets we send home at the beginning of the year.

Do homeless parents feel the absence of homework is a good thing? (CH) I always ask parents what their number one barrier is; hands down, it's homework. It's extremely difficult for homeless kids.

5. Additional Meetings

Mr. Perry indicated the next meeting would be dedicated to the brainstorming process. He asked the group to think in terms of policy, administrative regulation, and other aspects they might want to include in the report.

3. Adjourn

Mr. Perry adjourned the meeting at 9:13 p.m.



Fundraising Task Force Meeting Notes
June 14, 2017; 6:30-9:00 p.m.
Corvallis School District Administration Building
1555 SW 35th Street, Corvallis, OR 97333

Throughout these meeting notes, comments of task force members appear in *italic print*; those of the facilitator and identified presenters are in regular print. Unless enclosed in quotation marks, comments have been edited for clarity and brevity. Also for clarity, comments made by the facilitator and/or identified presenters will be preceded with the speaker's initials.

1. Welcome; Status Review

Facilitator Scott Perry (SP) set the stage for the evening. He referred to the existing policy and administrative regulation regarding fundraising, noting that some of the task force's recommendations might include removing language that currently exists in one of those documents.

2. Framework for Brainstorm of Options

Mr. Perry referred to suggested wording that had been sent to him by two task force members. He had taken some of their language and put it up onto a chart pack page on the wall as an example of categories and the things that people might be brainstorming. (SP) Brainstorming is just getting ideas out, not debating them. Afterward, we'll go through the Spend-A-Dollar activity and then have more discussion about the ideas that seem to jump out. After tonight, I'll prepare a draft set of recommendations. Remember that FTE (full time equivalent) refers to actual employees of the district, not, for example, athletic coaches at the high schools.

3. Brainstorm of Options

Task force members spent a period of time in silent reflection, then paired up and went through an exercise in which they shared with their partners the ideas they had brainstormed. Following the small group exercise, the full task force reassembled and members took turns sharing out their ideas with the full group. Following are the rough ideas that were captured on the chart pack pages.

FTE – Related:

- No individual school FTE but can raise district-wide Foundation \$ for distribution district-wide.
- Schools keep a given amount (like Portland but not \$10K) and 1/3 over that to pool. FTE OK with prior authorization from principal with additional percentage going to district-wide FTE fund.
- No private \$\$ to FTE or curriculum (core things that should be provided by district – books, materials, curriculum).

Tracking/Monitoring/Communication:

- District tracks and reviews \$ via fund raising.
- Modeling at leadership level of equity as priority.
- Explicit district goal (perhaps in conjunction with Foundation) to communicate district-wide picture. (Include school board as communicators.)
- Explicit goal and action plan to create more understanding of needs district-wide.
- Use students to help promote equity/understanding – after school program, transportation to integrate.

School-to-School Collaboration:

- Quarterly meetings – PTA/PTO, CSD and building administrators – collaborate on shared goals, ideas, fundraising to maximum benefit to all CSD students including full representation of school populations.
- Sister schools/collaboration – go together for fundraiser, international nights, etc. (not just \$\$ – collaborate and leverage resources in a variety of ways).

Dollar Pooling/Resource Pooling:

- Pool funds for activities district sees as priority so all students can participate (identify amount needed – district-wide and schools individually find a way to fund).
- Encourage 25% of fundraised dollars go to Foundation and redistribute to defined high need populations.
- Same as above but it's only anything over \$10K would give 25% (not limited to FTE).

District-Wide Fundraising:

- District shared pool for fall book fairs – credits out per-capita.
- Board/district fundraising goal each year. All schools participate – focused on district-wide priority. (Would help with district-wide communication re: needs.)
- School board/district allocate funds to Foundation to support fundraising in schools (grant writing – implementation support) (could be funding from district or school contribute).
- Equity fund via Foundation from individual donors – purpose to balance equity re: fundraising. Distributed by Foundation – not applied for.

Other:

- Seek longer term funding via legislature – PTA/PTO joint advocacy.
- School board needs to define what constitutes a “rainy day” with some reserves going toward high need/equity-related needs. (Look at actual needs today with equity needs in mind.)
- Explore and develop relationships with OSU's service learning focus to bring resources into schools.

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- Assess RTI and LRC programs re: adequacy of programs and equity of learning experiences.
- Study whether students in the DLI program are catching up in later grades.
- Assess students in their native language – capture full picture of their learning.

Process Review/Revisit:

- This process is rough – explore with part of this task force and part from a new after a certain amount of time.

4. “Spend-A-Dollar” Prioritization Activity

Mr. Perry explained that the purpose of the activity is for task force members to prioritize brainstormed ideas. Each member had a virtual dollar to spend; then, task force members “spent” their virtual dollar by allocating portions of it to ideas they wanted to move forward.

5. Review Process for Drafting Recommendations

Mr. Perry provided information about the process that task force members will engage in when drafting recommendations at the next meeting.

3. Adjourn

Mr. Perry adjourned the meeting at 9:05 p.m.



Fundraising Task Force Meeting Notes
June 20, 2017; 6:30-9:00 p.m.
Corvallis School District Administration Building
1555 SW 35th Street, Corvallis, OR 97333

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1. Welcome; Status Review

Facilitator Scott Perry (SP) reviewed some of the elements of the ground rules.

(SP) I asked Foundation Executive Director Liv Gifford to say a few words to the group because she's part and parcel of the fundraising in the district, yet her role is a little different than that of other task force members.

Some of Ms. Gifford's comments included:

- I asked for the opportunity to reiterate and clarify that the Foundation should not be seen as a driver of this process in any way.
- It's important to me and the Foundation board that they be perceived as neutral in this process.
- We all understand these won't be Foundation policies, and as much as we align ourselves with the district, we are separate from the district.
- I have responsibility for the day to day operations of the Foundation but I don't have control over the governance – that's for the board.
- I may have input (in the task force's process) about which ideas may be polarizing, which may be impractical, which may have merit; however, when we get to the point of making recommendations to the superintendent, those are your ideas.

I assumed that if the PTA/Os contributed money to increase equity to schools we feel needed it, the money would be funneled through the Foundation. How many members are on the Foundation board? We currently have 13 and membership is capped at 15.

Even though we're following the school board's underlying principle, funds donated through the Foundation would be governed by the board of the Foundation, not the superintendent or the school board – correct? That's accurate.

(SP) Part of the discussion will cover the implications of the recommendations and whether there are items in the language that you want changed, etc. I wanted to let you know that I showed the draft report to Superintendent Noss to make sure that I had information on things that might be unworkable for the district; Superintendent Noss told me there was nothing in there that would be. Also, I told him this piece could be way, way different after tonight's meeting.

2. Reading of Full Draft Report

Mr. Perry had sent a draft report to task force members yesterday. Knowing that not everyone would have been able to read the report before tonight's meeting, Mr. Perry gave task force members some time to read the report.

(SP) I developed the draft from the prioritized concepts that grew out of the last meeting, as well as other elements from the task force's discussions over time.

3. Section-by-Section Review of Draft Report

Task force members discussed all aspects of the report and provided edits, which were entered "live" on a projection screen by the note-taker. Consensus was reached on the changes to make to the report, except one section with language that was still unfinished by the end of the meeting.

To allow adequate time for that section to be vetted, the group agreed to add another meeting in July.

4. Adjourn

Mr. Perry adjourned the meeting at 9:05 p.m.



Fundraising Task Force Meeting Notes
July 13, 2017; 6:30-9:00 p.m.
Corvallis School District Administration Building
1555 SW 35th Street, Corvallis, OR 97333

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1. Welcome; Status Review

Facilitator Scott Perry (SP) welcomed the group and briefly recapped the status of the work to date.

2. Review/Revise Items 7, 8 & 9 of Draft Report

Task force members reviewed pages six and seven of the draft report as they had been edited at the June 20, 2017, task force meeting. Mr. Perry explained that this was done to refresh everyone's memories and prepare them for the discussion this evening.

(SP) Superintendent Noss and I had visited about an hour before this meeting started, and I asked him for feedback as to whether the items in the report were doable by the district. He suggested combining a couple of the recommendations for the administrative regulation so that the work of establishing a priority-targeted purpose and goal each year for district-wide fundraising would involve leadership from each PTO/A, building principals and the Corvallis Public Schools Foundation rather than just by the board and administration. He also felt that an equity fund could help the district meet the equity goal.

Mr. Perry read aloud an email from Ms. Gifford, who was unable to attend tonight, in which she offered her ideas for donations toward an equity fund.

(SP) Ms. Gifford's input and that of the superintendent gelled, so I made some minor modifications to the report to reflect them.

Mr. Perry shared those suggestions with the task force and asked for feedback.

I like the changes. There are two goals: equalize enrichment opportunities and support the efforts of the Foundation to help struggling students. But I feel it would be easier for people at my school to donate directly to the school and have it funded through the school. I'd like to have Ms. Gifford address every PTA/O once a year, to share information about the equity fund. Oversight will be difficult because it's not part of what the Foundation does right now. We're sort of dumping it in their laps.

I talked with Ms. Gifford before she sent her email to Mr. Perry. Ms. Gifford feels it'll be harder for people to donate to the Foundation rather than to their child's school. The enrichment piece is important and it is an important distinction. Ms. Gifford felt it was better to dump this

in the Foundation's and district's laps and let them take it on. If we can make clear to them our hopes for how the money will be distributed, we could leave it up to the lawyers and staff to figure out how to make that happen.

(SP) Superintendent Noss would like the group that meets twice a year to be the ones to set those targets; that group would be focused on equity.

It seems that group could be huge – this whole group of people, plus a principal from every school, etc.

(SP) It wouldn't have to include a principal from every school; we'd leave it up to the district to design that group. Sometimes you do end up with a large group but you could structure it so it would be workable to get the input from everyone in the group.

I think Ms. Gifford understood my concern. I like the solution that Mr. Perry put forth; it's up to the parents but we would say there's this opportunity for parents to help other students. This piece of giving them the choice seems like an elegant solution. But regarding the mechanism for how that money gets distributed, it would be good for the Foundation and the district to make those decisions.

Some of the conversations I've had at my school revolved around a desire to help the kids within our own school that are struggling, and to really put that money toward that community that the kids see every day. I feel conflicted about that and I wanted to see what your thoughts are.

I experienced the same thing. My parent group felt that the money should stay in the school. Task force members have been privileged to look at the numbers regarding the percentage of students at each school that qualify for free and reduced price meals. The percentage at my school is very low compared with other schools in the district. I've been persuaded that it's a big enough gap to warrant seriously considering supporting the schools that don't have enough money and have greater needs, even though there was the fleeting thought "why don't those parents pull their load?" But it's not the kids' fault – they can't be held responsible for the parents' financial situations.

There's a two step process I need to do at my school: 1) Get the PTO to think about this; and, 2) Change our bylaws regarding donating some of our money to the equity fund. After all, even though we go to different schools, we all go to the same swimming pool and play at the same parks, etc.

The PTO at my school voted on whether to give fundraised money to our own school or to give it to the Foundation. We decided to take care of our own first before we gave to others. I agree there's a two step process; just having parents be open to giving some of that money away is a big step and is something our school wouldn't directly benefit from. The other step

is having parents agree to give money to the greater community. My PTO is operating on the belief that they would raise funds that would ultimately be taken from them and given to other schools.

The school board didn't do a good job of communicating around this. And the GT article didn't help at all.

I think how we talk to the larger community will be critical and ideally would be done well before it goes to the school board. There's a way to communicate that your school's kids are still being taken care of.

I like Mr. Perry's changes – I'd had some of those same ideas for changes. They still address all of the goals the group had. I appreciate what Mr. Noss and Ms. Gifford said and I feel having dual options is really good. I think the hope is that there will be two meetings a year – one to establish the goals and one to distribute the funds. But that likely can't happen next year because there has to be an understanding among all parents of what the needs are. I wouldn't change anything.

So maybe we're talking about another recommendation about how the district rolls this out?

The parents I know are very keen to help – their first question is "what can we do to help?" Regarding the report, I don't want the homeless pot to decrease if the only option is to donate to the enrichment fund rather than having several donation options.

If your parent population wants funds to go to reading, they can designate to the Foundation but people tell me they have no idea they can do that. The Foundation must do a better job of communicating and teaching people how to do it.

Maybe with the registration packet?

I keep hearing from parents that they just don't know how to do it, and a button on the Foundation's website isn't enough.

We need to get all district schools to think of our students as a whole and think of fundraising as benefitting all students. I would like to see that language strengthened; if we're getting the group together twice a year, there's an opportunity for collaboration and cooperation and for building a culture where people stop thinking from the perspective of "their backyard" and start thinking about all these kids. If I'm helping all hungry students, I'm helping the 12 in my school as well. Develop a culture in which the district is a community rather than individual schools.

I would like to change the order of the recommendations in the report to have the statement regarding "encourage a sense of shared community and success for all students regardless of

school” be the first recommendation, and the statement regarding sister schools be the second – to weight them that way.

Isn’t that reflected in the educational equity policy?

I think it needs to be in here. How can we get everyone to think about all students as one community; if we’re taking care of all students, we’re helping those in our school too. It’s an aspirational point that we want to reach – the culture piece.

People are going to read the recommendations and talk about them; I think it needs to be included.

I agree that it has to be intentional and has to be put into words. It’s so important that I would have it by itself like a guiding principle.

I felt it carried more weight at the top.

Perhaps it could read “The ultimate goal of our task force is to create a broader community including all children regardless of race, money, gender, background, etc.....”

That makes sense because the defensiveness I hear is about money.

We want to care about all of our kids in our community – to give all of our kids a great opportunity.

Make it more reflective that they are the children of our community.

(SP) The basic idea is that the district is interested in promoting a culture where parents and leadership at every school are equally concerned about all students in the district rather than just the kids in their school.

We are trying to make sure all kids have the same academic or enrichment opportunities regardless of the school they attend.

It’s about embracing all children as “our children.”

But we don’t want to take out the personality of each school – some have incredible garden programs and some are dual immersion schools.

(SP) Perhaps we could add a statement that speaks to creating a broad community of concern and conveys the desire of the district that every school community within the district has as great a concern for the larger community as they do for their own. That sounds more like what is being sought. It’s not divisive – it’s “my school is as concerned

about the welfare and educational opportunities of students district-wide as it is its own.” To have some kind of a passionate statement that the school board and the district are really working intentionally to develop a culture of sensitivity district-wide.

I think we need to address the percentage of 10-25% that will be donated from each school; it is divisive. Maybe this group does a fundraiser just for equity twice a year. Students already do it through Mr./Ms. Spartan and Mr./Ms. CV.

It might feel less like a tax that way.

Task force members discussed the report a little further and made the last of their edits.

3. Review Page 5 Board Policy Recommendation

There was consensus that no revisions to Policy JBB – Educational Equity were needed.

4. Closure

Task force members offered their reflections on the process.

It’s not what I expected and I learned a ton from this process. I haven’t had as many sleepless nights as I have had in the last few months.

This was a much more complicated conversation than I thought it would be. I appreciate the extra meetings.

I will never run for school board and will never be a superintendent!

I liked seeing what different pieces spoke to different people. It will help me communicate better when I advocate for various populations.

Everyone was so respectful.

Thank you, Mr. Perry, for your leadership, patience and tone – they were imperative to the success of this process.

I learned way more from this process than what I brought to it.

I feel a better connection with all schools.

I am more used to having a captive audience that is more open to what I have to say and share (college students). The resistance I got from you at different times was difficult to observe and was disappointing because I have always felt that the only thing that we need to

live together and to see our kids as our kids and our community as our community is to get to know each other. I've always believed in utopia but now I realize the path ahead will be tougher than I thought.

I didn't run for school board at this time because there are so many other things that require attention.

I am thankful for the opportunity; it was difficult but I am thankful for it.

I was motivated by this work to go to my boss to write a policy for the state level!

(SP) This group has inspired me in a number of ways. I learned a lot about the district and about myself. I am grateful for people who are willing to do personal work, which happens when you grapple with your own perceptions. All of you kind of answer to a crowd that's behind you – PTA/O, school community – so you're under constant pressure about "how will I answer back and represent them?" But there's an urgency to set that aside and to say "let me look at the data or hear the parent presentation and put myself in all of the different shoes around the table." There are things we can do at the policy level, funding level, and fundraising level, but in terms of a child's experience, equity has to do with an equally safe environment, a place where they're welcomed if they're new to the school. If they're sitting alone at lunch, someone comes to sit with them. They feel emotionally safe to learn.

5. Adjourn

Mr. Perry adjourned the meeting at 9:08 p.m.

Information Requested by Fund-Raising Task Force

1. **Demographics:** What are the demographics of the district and each school in terms of socio-economic status, students/families of color, student population numbers over time, grade-level student counts over time, etc.

This information is available in the By the Numbers report, which was just updated for 2016-17 and is available online at <https://www.csd509j.net/wp-content/uploads/By-the-Numbers-2016-17.pdf>.

2. **Sample Policies:** What are sample policies and ARs from other districts? Especially districts similar to Corvallis in demographic make up (and what districts in Oregon are similar)? If they have implemented a plan that shares resources, what has been the impact of that plan on fundraising?

Scott will be presenting this.

3. **Equity:** What is the district's policy and plan around equity?

Policy already received. The board received an update on the equity action plan on March 20, 2017, which is available at <https://v3.boardbook.org/Public/PublicItemDownload.aspx?ik=40250258>.

4. **How much?:** How much does each school obtain through fund-raising, grants and Title 1? How much non-district funding is being obtained by each school now and how is that being used at each school? How has this changed over time (past 10 years?)

See Attachment A. This includes a summary and detail for each school of activity for the last four fiscal years and current fiscal year to date. This includes all school-based transactions in the District Donation Fund (204), Grants Fund (296), and Designated Revenue Fund (298). Transactions in the District Donation Fund are considered funds received through the Corvallis Public Schools Foundation. Transactions in the Designated Revenue Fund are considered funds received through the district's accounts.

5. **"Base" responsibility:** What does the district define as it's "base responsibility" funding for educating students – as opposed to "enhancement" funding? Is that base responsibility being met?

Schools receive allocations of FTE, not dollars, that are categorized in three areas: (1) classroom teachers; (2) grades K-6 enrichment; and (3) basic school support. See Attachment B – School Staffing FTE Allocations.

6. **Music, art, PE levels:** What is the "base FTE" for music, art and PE in the district and how much variance is there from that amount on a school-by-school basis?

See Attachment B.

7. **Policy and guidelines:** What are the guidelines currently in-place in our district for raising funds and expending those funds?

Already received.

8. **Triggering event?** What issue(s) or situation(s) triggered this review of fund-raising in the Corvallis School District?

The adoption of the new equity policy has created an opportunity to align our other policies, especially those that are outdated like the fundraising policy, with our equity vision and core values. The board has also received public testimony in the last year about increasing funding for two programs that are supplemented at some schools with FTE funded by school-based donations or fundraising - elementary art and library staffing – that have resulted in discussions about the need to set parameters about the use of school-based donations.

9. **All non-district funds included?** Is fund-raising for specific sports or clubs considered part of all fund raising in terms of district policies and guidelines? Football booster fund-raising, robotics club fund raising, etc. all considered “fund raising” just like any other PTO or PTA fund-raising activity. And are all of these within the purview of what we are developing policy and AR recommendations around?

Yes

10. **Principal’s discretionary funds:** Are there guidelines related to the hydraulic between a principal’s discretionary funds and non-district funds obtained via fund-raising and grants? In other words, a principal in one school could have the PTO or other source fund non-FTE needs that would otherwise come from that discretionary district funding so that the discretionary fund is freed up to pay for FTE... while the principal in another school might not. Policy or guidelines around this?

No, not at this time.

11. **Charter priorities?:** Is there a priority to the bullets on the board’s Charter goals and objectives? The part about paying for staff costs is quite specific while the bullet “provides guidance for fundraising across the district” is very broad and encompassing of many elements and issues.

The board’s discussion about the goals and objectives of the task force did not include a prioritization of the items listed.

12. **Grant writing:** How equitable is access to grant writing expertise at each of the schools in our district?

We do not currently provide or manage grant writing resources at schools.

13. **Long term liability:** If FTE is hired with non-district funds, what longer term liability is incurred by the district (such as PERS liability, unemployment liability, etc.)?

Likely none unless we experience a reduction in force and the employee has low seniority and is unable to transfer into another position; in that case, the district may be liable for unemployment compensation.

14. **Americorps:** How are Americorps staff allocated to the various schools in the district?

AmeriCorps volunteers working in schools are placed at the principal's discretion. Allocation of AmeriCorps staff is not managed at the district level.

15. **Donation policy:** What is the district's donation policy (as opposed to fund-raising policy)? This would be a policy that describes the district response to offerings of gifts, money, etc. from outside benefactors.

Policy KH – Public Gifts to the District
<http://policy.osba.org/corvall/KL/KH%20D1.PDF>

16. **Foundation:** How does the Foundation work? How does it compare/contrast with the fund-raising done by each individual school? What is the relationship and the history of that relationship?

Liv Gifford (who is on the fundraising task force) can speak to this. The school board received a report from the foundation last fall that includes their mission, priorities, and pathways of support. That report is available online at
<https://v3.boardbook.org/Public/PublicItemDownload.aspx?ik=39412305>.

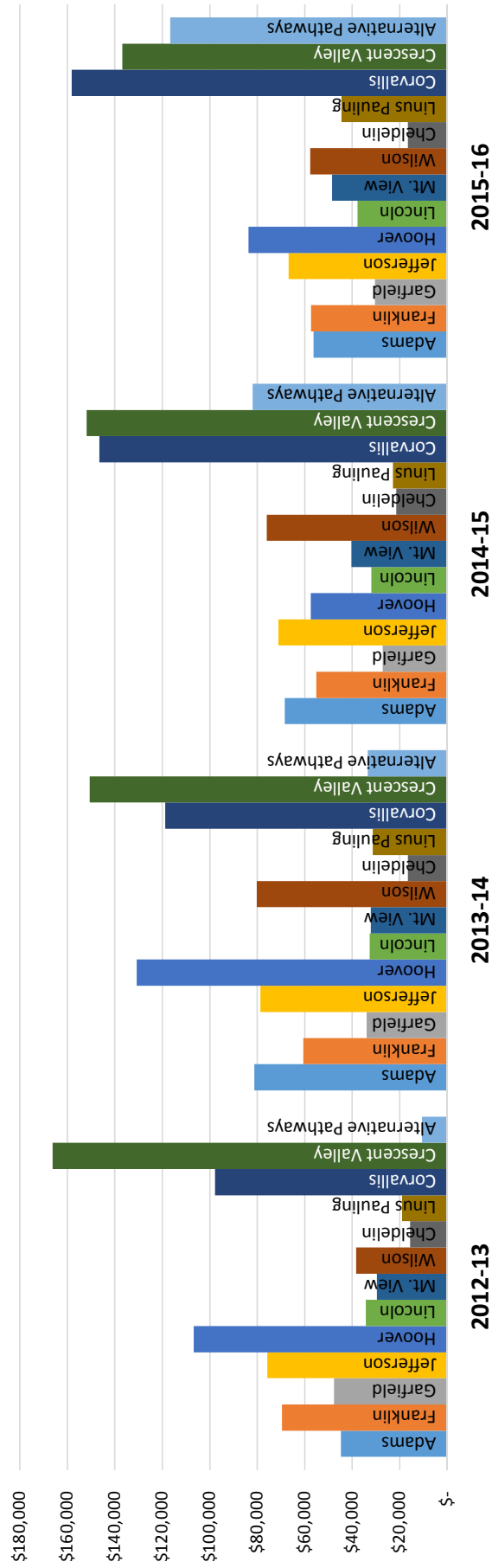
17. **Ask coordination:** How does coordination of all the different “asks” happen in the district (such as teacher-specific requests for contributions, crowdfunding, etc.). How are all of those tracked? Which fit within the scope of our work as a task force?

“Asks” are not tracked or coordinated at the district level, but may be at the school level per the principal's discretion. Regardless of source, any and all funds that pass through district accounts (including funds passed through to schools through the foundation) are subject to the fundraising policy.

SUMMARY	2012-13 Actual	2013-14 Actual	2014-15 Actual	2015-16 Actual	2016-17 YTD	2012-2016 Average
BEGINNING BALANCE	(745,243)	(812,721)	(878,017)	(837,505)	(886,631)	(818,371)
Adams	(65,488)	(45,242)	(81,293)	(68,401)	(56,247)	(65,106)
Franklin	(68,409)	(69,919)	(60,667)	(55,080)	(56,843)	(63,519)
Garfield	(87,575)	(47,719)	(33,964)	(27,184)	(28,461)	(49,110)
Jefferson	(76,916)	(75,738)	(78,633)	(71,166)	(66,586)	(75,613)
Hoover	(107,496)	(107,542)	(130,758)	(57,432)	(83,775)	(100,807)
Lincoln	(30,097)	(34,241)	(32,645)	(31,972)	(36,393)	(32,239)
Mt. View	(30,497)	(30,620)	(32,210)	(40,334)	(47,438)	(33,415)
Wilson	(22,427)	(79,371)	(76,978)	(61,322)	(48,507)	(60,025)
Cheldelin	(15,184)	(15,549)	(16,562)	(21,445)	(15,617)	(17,185)
Linus Pauling	(18,551)	(23,830)	(31,329)	(22,879)	(41,726)	(24,147)
Corvallis	(101,782)	(104,615)	(118,822)	(146,573)	(152,707)	(117,948)
Crescent Valley	(111,454)	(167,715)	(150,614)	(151,793)	(136,828)	(145,394)
Alternative Pathways	(9,367)	(10,620)	(33,543)	(81,924)	(115,503)	(33,864)
REVENUES						
Funds Received through District	(424,238)	(507,320)	(509,379)	(525,111)	(352,325)	(491,512)
Adams	(2,524)	(28,133)	(21,910)	(24,393)	(8,366)	(19,240)
Franklin	(120,508)	(136,877)	(108,872)	(119,815)	(120,758)	(121,518)
Garfield	19,263	(11,630)	(8,649)	(15,143)	(17,936)	(4,040)
Jefferson	(527)	(16,629)	(25,368)	(35,046)	(37,197)	(19,392)
Hoover	(58,315)	(53,564)	(40,013)	(33,978)	(31,992)	(46,467)
Lincoln	(7,062)	(8,428)	(20,732)	(41,634)	(12,631)	(19,464)
Mt. View	(9,437)	(12,480)	(10,057)	(9,780)	(4,910)	(10,438)
Wilson	(16,228)	(22,577)	(20,995)	(29,061)	(8,283)	(22,215)
Cheldelin	(14,350)	(4,845)	(10,789)	3,169	(1,006)	(6,704)
Linus Pauling	(4,781)	(5,155)	(4,628)	-	(95)	(3,641)
Corvallis	(77,657)	(81,759)	(82,575)	(61,508)	(36,133)	(75,875)
Crescent Valley	(131,358)	(107,860)	(114,011)	(109,600)	(67,808)	(115,707)
Alternative Pathways	(753)	(17,385)	(40,780)	(48,322)	(5,211)	(26,810)
Funds Received through Grants	(1,019,450)	(1,044,573)	(804,199)	(867,423)	(520,067)	(933,911)
Adams	-	-	-	-	-	-
Franklin	-	-	-	-	-	-
Garfield	(387,068)	(330,114)	(270,503)	(309,142)	(182,657)	(324,207)
Jefferson	-	(2,000)	-	-	-	(500)
Hoover	-	-	-	-	-	-
Lincoln	(298,169)	(287,807)	(224,644)	(226,014)	(125,041)	(259,159)
Mt. View	(156,096)	(186,429)	(143,779)	(125,127)	(50,215)	(152,858)
Wilson	(167,593)	(226,413)	(162,773)	(131,816)	(67,327)	(172,149)
Cheldelin	-	-	-	-	(2,500)	-
Linus Pauling	-	-	-	-	-	-
Corvallis	(9,190)	(8,810)	(2,500)	(4,733)	(30,132)	(6,308)
Crescent Valley	(1,333)	(3,000)	-	(19,339)	(29,022)	(5,918)
Alternative Pathways	-	-	-	(51,253)	(33,172)	(12,813)
Funds Received through Foundation	(357,638)	(423,638)	(349,799)	(366,631)	(213,417)	(374,427)
Adams	(27,596)	(64,330)	(16,662)	(29,078)	(2,396)	(34,417)
Franklin	(21,269)	(29,558)	(13,733)	(15,917)	(7,285)	(20,120)
Garfield	(2,176)	(10,287)	(8,360)	(6,854)	(12,813)	(6,919)
Jefferson	(45,584)	(47,822)	(38,699)	(44,523)	(16,873)	(44,157)
Hoover	(29,189)	(38,275)	(25,241)	(59,906)	(3,631)	(38,153)
Lincoln	(12,934)	(11,867)	(8,980)	(1,602)	(7,670)	(8,846)
Mt. View	(10,594)	(11,117)	(14,275)	(14,511)	(3,374)	(12,624)
Wilson	(22,200)	(28,175)	(7,163)	(9,117)	(11,756)	(16,664)
Cheldelin	(4,609)	(6,491)	(19,844)	(19,080)	(26,069)	(12,506)
Linus Pauling	(25,476)	(44,099)	(33,205)	(37,129)	(17,820)	(34,977)
Corvallis	(46,313)	(58,278)	(57,476)	(46,867)	(41,453)	(52,234)
Crescent Valley	(107,474)	(60,082)	(82,591)	(61,985)	(45,504)	(78,033)
Alternative Pathways	(2,222)	(13,256)	(23,572)	(20,062)	(16,771)	(14,778)

TOTAL REVENUES	(1,801,326)	(1,975,531)	(1,663,377)	(1,759,165)	(1,085,809)	(1,799,850)
EXPENDITURES						
Funds Received through District	340,255	356,558	422,781	334,878	296,075	363,618
Adams	16,019	31,037	20,397	26,537	9,685	23,497
Franklin	27,001	34,373	14,422	6,117	5,869	20,478
Garfield	13,567	26,223	10,706	11,202	10,762	15,424
Jefferson	16,847	18,950	26,199	28,865	30,586	22,715
Hoover	54,200	29,582	94,651	24,210	33,273	50,661
Lincoln	7,171	9,658	22,308	26,616	27,791	16,438
Mt. View	12,014	17,734	7,306	4,445	3,218	10,375
Wilson	18,265	20,110	14,667	28,779	16,635	20,455
Cheldelin	12,478	2,531	9,355	1,305	786	6,418
Linus Pauling	808	619	2,707	-	285	1,033
Corvallis	65,250	66,645	67,049	62,172	68,466	65,279
Crescent Valley	96,206	97,907	130,705	99,141	65,196	105,990
Alternative Pathways	429	1,189	2,309	15,489	23,523	4,854
Funds Received through Grants	1,019,450	1,044,573	804,199	867,423	520,067	933,911
Adams	-	-	-	-	-	-
Franklin	-	-	-	-	-	-
Garfield	387,068	330,114	270,503	309,142	182,657	324,207
Jefferson	-	2,000	-	-	-	500
Hoover	-	-	-	-	-	-
Lincoln	298,169	287,807	224,644	226,014	125,041	259,159
Mt. View	156,096	186,429	143,779	125,127	50,215	152,858
Wilson	167,593	226,413	162,773	131,816	67,327	172,149
Cheldelin	-	-	-	-	2,500	-
Linus Pauling	-	-	-	-	-	-
Corvallis	9,190	8,810	2,500	4,733	30,132	6,308
Crescent Valley	1,333	3,000	-	19,339	29,022	5,918
Alternative Pathways	-	-	-	51,253	33,172	12,813
Funds Received through Foundation	430,823	505,865	462,254	483,085	369,282	470,507
Adams	34,871	25,375	31,067	39,010	25,137	32,581
Franklin	113,562	141,314	113,771	127,351	131,175	124,000
Garfield	9,203	9,449	13,083	7,625	5,791	9,840
Jefferson	30,442	42,606	45,334	55,096	16,365	43,370
Hoover	33,994	39,040	43,928	43,331	15,342	40,073
Lincoln	8,680	12,234	8,076	10,832	2,065	9,956
Mt. View	8,859	4,273	8,902	11,701	9,349	8,434
Wilson	4,179	29,795	14,491	12,956	13,949	15,355
Cheldelin	6,116	7,791	16,394	19,551	17,643	12,463
Linus Pauling	28,998	41,136	43,575	15,440	30,592	32,287
Corvallis	62,690	59,186	45,251	34,671	30,617	50,449
Crescent Valley	87,937	87,136	64,719	87,409	52,517	81,800
Alternative Pathways	1,294	6,529	13,663	18,113	18,740	9,899
TOTAL ALL EXPENDITURES	1,790,528	1,906,996	1,689,233	1,685,386	1,185,425	1,768,036
ENDING BALANCE	(756,040)	(881,257)	(852,160)	(911,283)	(787,016)	(850,185)
Adams	(44,719)	(81,293)	(68,401)	(56,325)	(32,186)	(62,684)
Franklin	(69,623)	(60,667)	(55,080)	(57,343)	(47,842)	(60,678)
Garfield	(47,719)	(33,964)	(27,184)	(30,354)	(42,657)	(34,805)
Jefferson	(75,738)	(78,633)	(71,166)	(66,774)	(73,705)	(73,078)
Hoover	(106,806)	(130,758)	(57,432)	(83,775)	(70,784)	(94,693)
Lincoln	(34,241)	(32,645)	(31,972)	(37,761)	(26,838)	(34,155)
Mt. View	(29,655)	(32,210)	(40,334)	(48,479)	(43,155)	(37,669)
Wilson	(38,412)	(80,218)	(75,978)	(57,766)	(37,962)	(63,094)
Cheldelin	(15,549)	(16,562)	(21,445)	(16,500)	(24,264)	(17,514)
Linus Pauling	(19,003)	(31,329)	(22,879)	(44,569)	(28,764)	(29,445)
Corvallis	(97,813)	(118,822)	(146,573)	(158,105)	(131,210)	(130,328)
Crescent Valley	(166,142)	(150,614)	(151,793)	(136,828)	(132,426)	(151,344)
Alternative Pathways	(10,620)	(33,543)	(81,924)	(116,705)	(95,222)	(60,698)

SCHOOL DESIGNATED FUNDS
Balances at Year End (June 30)



ADAMS ELEMENTARY	2012-13 Actual	2013-14 Actual	2014-15 Actual	2015-16 Actual	2016-17 YTD
BEGINNING BALANCE					
Funds Received through District	(31,853)	(18,358)	(15,454)	(16,967)	(14,823)
412 MacGruder Field Trips	(2,374)	(4,321)	(3,847)	(3,690)	(4,292)
421 Teacher Accounts	(4,214)	(4,037)	(10,080)	(12,713)	(10,531)
435 Kinder Balances Holding Account	(25,265)	(10,000)	(1,527)	(564)	-
Funds Received through Foundation	(33,636)	(26,884)	(65,839)	(51,434)	(41,424)
640 Foundation Grants	-	-	-	(146)	-
648 General	(19,483)	(18,550)	(21,749)	(16,796)	(19,435)
649 Art	(12,115)	(5,707)	(41,631)	(30,553)	(13,200)
655 Library	(131)	(302)	(947)	(3,264)	(837)
658 Music	(350)	(400)	(489)	(343)	(432)
659 PE/Health	(365)	(1,015)	(543)	(304)	(323)
662 Technology	(1,192)	(910)	(480)	(28)	(7,197)
TOTAL BEGINNING BALANCE	(65,488)	(45,242)	(81,293)	(68,401)	(56,247)
CURRENT YEAR REVENUES					
Funds Received through District	(2,524)	(28,133)	(21,910)	(24,393)	(8,366)
409 Child Care Program	(47)	-	-	-	-
412 MacGruder Field Trips	(11,665)	(17,336)	(13,566)	(15,197)	(4,209)
420 Miscellaneous	-	-	(105)	-	(95)
421 Teacher Accounts	(5,325)	(10,797)	(8,238)	(9,196)	(4,061)
435 Kinder Balances Holding Account	14,512	-	-	-	-
Funds Received through Grants	-	-	-	-	-
Funds Received through Foundation	(27,596)	(64,330)	(16,662)	(29,078)	(2,396)
640 Foundation Grants	-	-	(1,364)	(557)	(1,743)
648 General	(6,426)	(11,150)	(7,712)	(12,005)	(301)
649 Art	(14,916)	(48,838)	(2,972)	(6,329)	-
655 Library	(1,812)	(1,862)	(2,910)	(500)	-
658 Music	(50)	(179)	-	(326)	-
659 PE/Health	(1,994)	(975)	(1,388)	(800)	(352)
662 Technology	(2,398)	(1,325)	(317)	(8,560)	-
TOTAL CURRENT YEAR REVENUES	(30,121)	(92,463)	(38,572)	(53,471)	(10,761)
TOTAL ALL REVENUES	(95,609)	(137,705)	(119,865)	(121,872)	(67,008)
EXPENDITURES					
Funds Received through District	16,019	31,037	20,397	26,537	9,685
409 Child Care Program	47	-	-	-	-
412 MacGruder Field Trips	9,717	17,810	13,723	14,595	5,152
420 Miscellaneous	-	-	105	-	285
421 Teacher Accounts	5,502	4,754	5,605	11,378	5,301
435 Kinder Balances Holding Account	752	8,473	963	564	(1,052)
Funds Received through Grants	-	-	-	-	-
Funds Received through Foundation	34,871	25,375	31,067	39,010	25,137
640 Foundation Grants	523	-	1,188	703	928
648 General	7,360	7,952	12,694	9,289	10,218
649 Art	21,324	12,914	14,050	23,682	6,393
652 Facilities	-	-	-	-	40
655 Library	1,640	1,217	593	2,928	281
658 Music	-	90	146	238	-
659 PE/Health	1,345	1,447	1,627	780	719
662 Technology	2,680	1,755	769	1,391	6,558

TOTAL ALL EXPENDITURES	50,890	56,412	51,464	65,547	34,822
ENDING BALANCE	(44,719)	(81,293)	(68,401)	(56,325)	(32,186)

FRANKLIN K-8 SCHOOL		2012-13	2013-14	2014-15	2015-16	2016-17
		Actual	Actual	Actual	Actual	YTD
BEGINNING BALANCE						
Funds Received through District		(48,557)	(55,503)	(51,066)	(46,167)	(38,631)
401 7th Grade Washington DC Trip		(32,019)	(35,848)	(27,943)	(30,131)	(21,730)
405 Science Olympiad		(4,851)	(3,255)	(4,025)	(3,290)	(3,146)
413 Field Trips		(2,536)	(2,841)	(2,521)	(2,473)	(2,053)
416 PTA & PTO Miscellaneous		-	-	-	(360)	(360)
417 General/Misc/Special Activities		(3,551)	(6,046)	(8,768)	(4,577)	(5,670)
421 Lost Library Books		(245)	(222)	(289)	(99)	(291)
428 Outdoor School		-	(35)	-	-	-
430 Performing Arts		(1,290)	(2,086)	(1,496)	(823)	(576)
436 Student Council/Government		(336)	(496)	(699)	(613)	(430)
443 Volunteer & Donated Hours		(500)	(443)	(443)	(240)	(240)
459 Extra Curricular Activities		(3,230)	(4,231)	(4,880)	(3,559)	(4,134)
Funds Received through Foundation		(19,851)	(14,416)	(9,601)	(8,912)	(18,212)
640 Foundation Grants		-	-	-	(364)	-
648 General		(4,085)	(4,480)	(6,178)	(5,747)	(15,705)
649 Art		(13,459)	(7,542)	(2,253)	-	(170)
651 Extra Curricular Activities		(325)	(325)	(325)	-	-
652 Facilities		(420)	(420)	(420)	-	-
655 Library		-	-	-	-	(47)
658 Music		-	-	-	(243)	(326)
660 Science		(1,162)	(1,250)	(25)	(995)	(1,965)
662 Technology		(400)	(400)	(400)	(1,564)	-
TOTAL BEGINNING BALANCE		(68,409)	(69,919)	(60,667)	(55,080)	(56,843)
CURRENT YEAR REVENUES						
Funds Received through District		(120,508)	(136,877)	(108,872)	(119,815)	(120,758)
401 7th Grade Washington DC Trip		(91,662)	(95,178)	(85,696)	(99,077)	(96,970)
405 Science Olympiad		(3,945)	(25,460)	(3,490)	(4,438)	(5,410)
413 Field Trips		(4,730)	(4,708)	(4,503)	(5,257)	(7,395)
416 PTA & PTO Miscellaneous		(11,113)	(3,944)	(7,750)	(6,523)	(3,946)
417 General/Misc/Special Activities		(4,159)	(3,655)	(4,093)	(1,733)	(6,558)
420 Substitute Reimbursements		(549)	-	-	-	-
421 Lost Library Books		(33)	(67)	(55)	(202)	(30)
428 Outdoor School		(35)	35	-	-	-
430 Performing Arts		(2,233)	(1,443)	(2,575)	(1,337)	(120)
436 Student Council/Government		(238)	(293)	(61)	-	-
443 Volunteer & Donated Hours		-	-	-	-	-
459 Extra Curricular Activities		(1,811)	(2,165)	(650)	(1,248)	(330)
Funds Received through Grants		-	-	-	-	-
Funds Received through Foundation		(21,269)	(29,558)	(13,733)	(15,917)	(7,285)
640 Foundation Grants		-	-	(1,363)	0	(1,360)
648 General		(3,021)	(4,932)	(2,822)	(16,211)	(4,958)
649 Art		(17,756)	(24,269)	(7,917)	(170)	-
651 Extra Curricular Activities		-	-	325	-	-
652 Facilities		-	-	420	-	-
655 Library		-	-	-	(47)	-
658 Music		-	-	(243)	(83)	(47)
660 Science		(492)	(358)	(970)	(970)	(920)
662 Technology		-	-	(1,164)	1,564	-
TOTAL CURRENT YEAR REVENUES		(141,777)	(166,435)	(122,605)	(135,732)	(128,043)

TOTAL ALL REVENUES	(210,186)	(236,354)	(183,272)	(190,812)	(184,886)
EXPENDITURES					
Funds Received through District	27,001	34,373	14,422	6,117	5,869
640 Foundation Grants	296	-	999	363	475
648 General	2,626	3,234	3,253	5,754	5,145
649 Art	23,674	29,557	10,170	-	39
660 Science	405	1,583	-	-	210
Funds Received through Grants	-	-	-	-	-
Funds Received through Foundation	113,562	141,314	113,771	127,351	131,175
401 7th Grade Washington DC Trip	87,832	103,083	83,508	107,479	110,891
405 Clubs/Activities	5,541	24,690	4,226	4,581	5,729
413 Teacher Fundraising	4,426	5,027	4,551	5,677	6,711
416 PTA & PTO Miscellaneous	11,113	3,944	7,390	6,523	4,306
417 General/Misc/Special Activities	1,664	932	8,283	640	2,509
420 Substitute Reimbursements	549	-	-	-	-
421 Lost Library Books	56	-	244	10	115
430 Programs	1,437	2,033	3,248	1,584	-
436 Student Council/Government	78	90	146	184	209
443 Volunteer & Donated Hours	56	-	203	-	-
459 Student Activity & Supply Fees	811	1,515	1,971	673	706
TOTAL ALL EXPENDITURES	140,563	175,687	128,193	133,469	137,044
ENDING BALANCE	(69,623)	(60,667)	(55,080)	(57,343)	(47,842)

GARFIELD ELEMENTARY	2012-13 Actual	2013-14 Actual	2014-15 Actual	2015-16 Actual	2016-17 YTD
BEGINNING BALANCE					
Funds Received through District	(67,441)	(34,612)	(20,018)	(17,962)	(21,903)
402 Site Designated	(54,006)	(16,634)	-	-	-
416 PTA & PTO Miscellaneous	-	(2,547)	(6,143)	(4,469)	(484)
417 General/Misc/Special Activities	(13,380)	(15,376)	(13,820)	(13,493)	(21,419)
434 Staffing/Subs/Contracts	(55)	(55)	(55)	-	-
Funds Received through Foundation	(20,133)	(13,107)	(13,946)	(9,222)	(6,558)
637 Textbooks	(428)	-	-	-	-
638 ELL	(701)	(701)	(701)	(141)	(141)
640 Foundation Grants	-	-	-	(364)	-
648 General	(18,018)	(11,420)	(12,258)	(6,164)	(5,083)
652 Art	(986)	(986)	(986)	(986)	(986)
655 Library	-	-	-	(1,213)	(337)
658 Music	-	-	-	(355)	(11)
TOTAL BEGINNING BALANCE	(87,575)	(47,719)	(33,964)	(27,184)	(28,461)
CURRENT YEAR REVENUES					
Funds Received through District	19,263	(11,630)	(8,649)	(15,143)	(17,936)
402 Site Designated	29,109	(60)	-	-	-
416 PTA & PTO Miscellaneous	(6,885)	(8,546)	(1,601)	(9,722)	(16,642)
417 General/Misc/Special Activities	(2,862)	(3,023)	(7,011)	(4,305)	(1,294)
420 Miscellaneous	(100)	-	(93)	(1,115)	-
434 Staffing/Subs/Contracts	-	-	55	-	-
Funds Received through Grants	(387,068)	(330,114)	(270,503)	(309,142)	(182,657)
218 Title IA/ID	(16,172)	(291,625)	(3,152)	(257,720)	(9,493)
219 Title IA/ID	(370,896)	(33,502)	(267,338)	(48,422)	(173,164)
288 Inactive	-	(4,987)	(13)	(3,000)	-
Funds Received through Foundation	(2,176)	(10,287)	(8,360)	(6,854)	(12,813)
638 ELL	-	-	(685)	-	-
640 Foundation Grants	-	-	(2,099)	(2,880)	(8,513)
648 General	(2,176)	(10,287)	(3,833)	(3,641)	(1,212)
655 Library	-	-	-	(333)	(2,183)
658 Music	-	-	(1,743)	-	(906)
TOTAL CURRENT YEAR REVENUES	(369,982)	(352,031)	(287,512)	(331,139)	(213,406)
TOTAL ALL REVENUES	(457,557)	(399,750)	(321,476)	(358,322)	(241,866)
EXPENDITURES					
Funds Received through District	13,567	26,223	10,706	11,202	10,762
402 Site Designated	8,264	16,694	-	-	-
416 PTA & PTO Miscellaneous	4,338	4,950	3,274	13,707	9,122
417 General/Misc/Special Activities	866	4,578	7,339	(3,621)	1,640
420 Miscellaneous	100	-	93	1,115	-
Funds Received through Grants	387,068	330,114	270,503	309,142	182,657
218 Title IA/ID	16,172	291,625	3,152	257,720	9,493
219 Title IA/ID	370,896	33,502	267,338	48,422	173,164
288 Inactive	-	4,987	13	3,000	-
Funds Received through Foundation	9,203	9,449	13,083	7,625	5,791
637 Textbooks	428	-	-	-	-
638 ELL	-	-	1,246	-	-
640 Foundation Grants	-	-	1,348	3,244	4,375
648 General	8,774	9,449	10,315	2,828	1,054

655 Library	-	-	-	1,208	-
658 Music	-	-	175	344	363
TOTAL ALL EXPENDITURES	409,838	365,786	294,292	327,969	199,210
ENDING BALANCE	(47,719)	(33,964)	(27,184)	(30,354)	(42,657)

JEFFERSON ELEMENTARY		2012-13	2013-14	2014-15	2015-16	2016-17
		Actual	Actual	Actual	Actual	YTD
BEGINNING BALANCE						
Funds Received through District		(54,133)	(37,813)	(35,491)	(34,660)	(40,842)
402 Site Designated		(31,415)	(12,132)	(9,406)	(10,366)	(11,795)
405 Birthday Bash		(324)	(584)	(593)	(370)	(255)
412 Teacher Fundraising		(562)	(494)	(679)	(585)	(182)
413 Teacher Fundraising		(664)	(676)	(294)	(168)	(454)
414 Teacher Fundraising		(1,221)	-	-	(227)	(218)
415 Teacher Fundraising		(1,520)	(1,370)	(1,058)	(1,099)	(1,410)
417 General/Misc/Special Activities		(6,198)	(8,766)	(10,243)	(9,582)	(12,832)
421 Lost Library Books		(1,863)	(2,026)	(2,294)	(2,350)	(2,420)
423 Teacher Fundraising		(955)	(1,353)	-	-	-
424 Teacher Fundraising		(1,702)	(1,749)	(1,684)	(2,113)	(1,975)
430 Programs		(252)	(280)	(825)	(1,251)	(1,123)
437 Teacher Supplies		(875)	(244)	(132)	(222)	(366)
460 Site Designated		-	-	-	-	(461)
461 Choir/Music Fundraising		(16)	(216)	(361)	(533)	(775)
462 Spanish & Other Languages		(734)	(929)	(1,389)	(275)	(275)
463 Teacher Fundraising		(1,606)	(1,756)	(1,644)	(1,122)	(980)
464 Teacher Fundraising		(1,261)	(1,659)	(2,004)	(1,405)	(1,735)
465 Teacher Fundraising		(1,074)	(1,382)	(239)	(232)	(394)
466 Teacher Fundraising		(462)	(760)	(889)	(1,054)	(1,351)
467 Teacher Fundraising		(368)	(501)	(185)	(226)	(394)
468 Teacher Fundraising		(809)	(425)	(1,116)	(643)	(394)
469 Teacher Fundraising		(183)	(183)	(183)	(183)	(183)
470 Teacher Fundraising		(68)	(328)	(272)	(654)	(867)
Funds Received through Foundation		(22,783)	(37,925)	(43,142)	(36,506)	(25,745)
640 Foundation Grants		-	-	-	(598)	-
648 General		(21,958)	(37,100)	(42,317)	(35,083)	(25,745)
656 Literacy		(825)	(825)	(825)	(825)	-
TOTAL BEGINNING BALANCE		(76,916)	(75,738)	(78,633)	(71,166)	(66,586)

CURRENT YEAR REVENUES

Funds Received through District		(527)	(16,629)	(25,368)	(35,046)	(37,197)
402 Site Designated		12,278	(4,471)	(5,881)	(6,359)	(4,680)
405 Birthday Bash		(901)	(1,087)	(2,483)	(2,465)	(95)
412 Teacher Fundraising		(322)	(300)	(252)	(826)	(25)
413 Teacher Fundraising		(312)	(211)	(385)	(785)	-
414 Teacher Fundraising		1,221	-	(759)	(1,318)	(250)
415 Teacher Fundraising		(789)	(562)	(505)	(992)	(25)
416 PTA & PTO Miscellaneous		-	-	-	-	(29,000)
417 General/Misc/Special Activities		(1,889)	(4,380)	(4,953)	(6,560)	(1,115)
421 Lost Library Books		(211)	(272)	(68)	(100)	(40)
423 Teacher Fundraising		(791)	1,353	-	-	-
424 Teacher Fundraising		(662)	(556)	(664)	(745)	(86)
430 Programs		(1,812)	(701)	(1,703)	(1,263)	(343)
437 Teacher Supplies		(313)	(303)	(225)	(914)	(125)
460 Site Designated		-	-	-	(810)	(75)
461 Choir/Music Fundraising		(591)	(749)	(177)	(571)	-
462 Spanish & Other Languages		(953)	(602)	(690)	(1,332)	(122)
463 Teacher Fundraising		(326)	(162)	(290)	(810)	-
464 Teacher Fundraising		(808)	(824)	(1,013)	(2,908)	(30)
465 Teacher Fundraising		(1,216)	(832)	(1,984)	(1,737)	(391)

466	Teacher Fundraising	(298)	(193)	(325)	(1,465)	(70)
467	Teacher Fundraising	(391)	(210)	(466)	(653)	(50)
468	Teacher Fundraising	(414)	(761)	(805)	(1,315)	(386)
470	Teacher Fundraising	(1,029)	(806)	(1,741)	(1,118)	(290)
Funds Received through Grants		-	(2,000)	-	-	-
293	Inactive	-	(2,000)	-	-	-
Funds Received through Foundation		(45,584)	(47,822)	(38,699)	(44,523)	(16,873)
640	Foundation Grants	-	(963)	(864)	500	(2,766)
648	General	(45,584)	(46,859)	(37,835)	(45,023)	(14,107)
TOTAL CURRENT YEAR REVENUES		(46,112)	(66,451)	(64,067)	(79,569)	(54,070)
TOTAL ALL REVENUES		(123,028)	(142,189)	(142,699)	(150,735)	(120,656)
EXPENDITURES						
Funds Received through District		16,847	18,950	26,199	28,865	30,586
402	Site Designated	7,005	7,197	4,921	4,930	6,149
405	Clubs/Activities	641	1,078	2,706	2,580	383
412	Teacher Fundraising	390	114	346	1,229	-
413	Teacher Fundraising	301	593	511	499	-
414	Teacher Fundraising	-	-	531	1,327	-
415	Teacher Fundraising	939	874	465	680	156
416	PTA & PTO Miscellaneous	-	-	-	-	22,369
417	General/Misc/Special Activities	(679)	2,903	5,614	3,311	212
421	Lost Library Books	48	4	12	30	-
423	Teacher Fundraising	393	-	-	-	-
424	Teacher Fundraising	614	621	234	883	(65)
430	Programs	1,784	156	1,277	1,391	287
437	Teacher Supplies	944	414	135	770	-
460	Site Designated	-	-	-	349	-
461	Choir/Music Fundraising	391	603	6	329	-
462	Spanish & Other Languages	758	142	1,803	1,332	-
463	Teacher Fundraising	176	274	812	952	50
464	Teacher Fundraising	410	478	1,612	2,578	413
465	Teacher Fundraising	908	1,975	1,991	1,575	311
466	Teacher Fundraising	-	64	160	1,168	-
467	Teacher Fundraising	257	527	425	485	-
468	Teacher Fundraising	797	70	1,278	1,564	-
470	Teacher Fundraising	769	862	1,359	905	321
Funds Received through Grants		-	2,000	-	-	-
293	Inactive	-	2,000	-	-	-
Funds Received through Foundation		30,442	42,606	45,334	55,096	16,365
640	Foundation Grants	-	963	266	98	1,416
648	General	30,442	41,643	45,068	54,173	14,950
656	Literacy	-	-	-	825	-
TOTAL ALL EXPENDITURES		47,290	63,556	71,533	83,961	46,951
ENDING BALANCE		(75,738)	(78,633)	(71,166)	(66,774)	(73,705)

HOOVER ELEMENTARY		2012-13	2013-14	2014-15	2015-16	2016-17
		Actual	Actual	Actual	Actual	YTD
BEGINNING BALANCE						
Funds Received through District		(61,294)	(65,409)	(89,391)	(34,752)	(44,521)
412 5th Grade Field Trip		(3,329)	(2,869)	(4,501)	(4,311)	(4,859)
413 Choir		-	-	-	(22)	(20)
414 Music		-	-	-	-	(500)
415 Band		-	-	-	-	(121)
417 General/Misc/Special Activities		(51,642)	(57,913)	(79,181)	(18,484)	(31,886)
421 Lost Library Books		(189)	(200)	(423)	(1,608)	(2,147)
460 Teacher Fundraising		-	-	-	(453)	(147)
461 Miscellaneous		(216)	(436)	(720)	(477)	(303)
462 Classroom Teacher		(671)	(381)	(180)	(566)	(343)
463 Teacher Fundraising		(491)	(219)	(204)	(717)	(207)
464 Teacher Fundraising		(821)	(625)	(685)	(1,454)	(415)
465 Teacher Fundraising		(681)	(186)	(343)	(902)	(911)
466 Teacher Fundraising		(676)	(495)	(257)	(710)	(305)
467 Teacher Fundraising		(603)	(539)	(781)	(1,134)	(595)
468 Teacher Fundraising		(438)	(396)	(569)	(1,110)	(284)
469 Teacher Fundraising		(255)	(416)	(587)	(929)	(907)
470 Teacher Fundraising		(288)	(230)	(337)	(671)	(411)
471 Teacher Fundraising		(994)	(505)	(354)	(1,104)	78
472 Teacher Fundraising		-	-	(270)	(101)	(239)
Funds Received through Foundation		(46,202)	(42,133)	(41,367)	(22,680)	(39,254)
648 General		(73,700)	(40,752)	(40,453)	(22,304)	(39,027)
649 Art		28,369	(8)	(50)	(10)	(10)
655 Library		(282)	-	-	-	-
659 PE/Health		(588)	(1,373)	(864)	(365)	(217)
TOTAL BEGINNING BALANCE		(107,496)	(107,542)	(130,758)	(57,432)	(83,775)
CURRENT YEAR REVENUES						
Funds Received through District		(58,315)	(53,564)	(40,013)	(33,978)	(31,992)
412 5th Grade Field Trip		(9,549)	(13,969)	(11,832)	(11,761)	(1,200)
413 Choir		-	-	(262)	(200)	(500)
414 Music		-	-	(458)	(685)	(35)
415 Band		-	-	(360)	(200)	-
417 General/Misc/Special Activities		(48,966)	(35,132)	(13,742)	(16,286)	(25,317)
420 Substitute Reimbursements		-	-	-	-	(285)
421 Lost Library Books		(42)	(223)	(1,347)	(643)	(1,731)
460 Teacher Fundraising		-	-	(462)	(278)	(300)
461 Miscellaneous		(272)	(423)	(941)	(482)	(280)
462 Classroom Teacher		109	110	(875)	(779)	(444)
463 Teacher Fundraising		234	(76)	(931)	(368)	(475)
464 Teacher Fundraising		114	(535)	(1,365)	(150)	(316)
465 Teacher Fundraising		(116)	(427)	(1,194)	(350)	361
466 Teacher Fundraising		160	(215)	(1,201)	(88)	(241)
467 Teacher Fundraising		12	(380)	(886)	86	220
468 Teacher Fundraising		(52)	(593)	(773)	(318)	(346)
469 Teacher Fundraising		(219)	(547)	(697)	(584)	128
470 Teacher Fundraising		(134)	(305)	(959)	(322)	(344)
471 Teacher Fundraising		407	(323)	(977)	(131)	(302)
472 Teacher Fundraising		-	(525)	(751)	(440)	(585)
Funds Received through Grants		-	-	-	-	-
Funds Received through Foundation		(29,189)	(38,275)	(25,241)	(59,906)	(3,631)

640	Foundation Grants	-	(2,000)	(1,364)	(489)	(382)
648	General	274	(35,180)	(22,809)	(58,340)	(2,309)
649	Art	(28,489)	(120)	(118)	(107)	10
659	PE/Health	(975)	(975)	(950)	(970)	(950)
TOTAL CURRENT YEAR REVENUES		(87,504)	(91,839)	(65,253)	(93,884)	(35,624)
TOTAL ALL REVENUES		(195,000)	(199,380)	(196,011)	(151,316)	(119,399)
EXPENDITURES						
Funds Received through District		54,200	29,582	94,651	24,210	33,273
402	Site Designated	-	-	-	-	17
412	5th Grade Field Trip	10,009	12,337	12,022	11,213	3,565
413	Choir	-	-	240	202	329
414	Music	-	-	458	185	-
415	Band	-	-	360	79	-
417	General/Misc/Special Activities	42,695	13,863	74,439	2,884	22,758
420	Substitute Reimbursements	-	-	-	-	285
421	Lost Library Books	31	-	162	103	1,089
460	Teacher Fundraising	-	-	9	584	241
461	Miscellaneous	52	139	1,183	656	362
462	Classroom Teacher	181	91	489	1,002	358
463	Teacher Fundraising	38	91	419	878	449
464	Teacher Fundraising	83	475	596	1,189	708
465	Teacher Fundraising	610	270	634	341	53
466	Teacher Fundraising	21	453	748	493	344
467	Teacher Fundraising	52	139	533	453	174
468	Teacher Fundraising	95	420	232	1,144	529
469	Teacher Fundraising	59	376	356	606	359
470	Teacher Fundraising	191	198	625	582	277
471	Teacher Fundraising	83	475	227	1,313	405
472	Class AP Fee - Social Studies	-	256	920	302	769
648	General	-	-	-	-	200
Funds Received through Grants		-	-	-	-	-
Funds Received through Foundation		33,994	39,040	43,928	43,331	15,342
640	Foundation Grants	736	2,000	1,364	489	107
648	General	32,674	35,479	40,957	41,618	15,205
649	Art	112	78	158	107	-
655	Library	282	-	-	-	-
659	PE/Health	190	1,483	1,449	1,118	30
TOTAL ALL EXPENDITURES		88,194	68,623	138,579	67,541	48,614
ENDING BALANCE		(106,806)	(130,758)	(57,432)	(83,775)	(70,784)

LINCOLN ELEMENTARY	2012-13	2013-14	2014-15	2015-16	2016-17
	Actual	Actual	Actual	Actual	YTD
BEGINNING BALANCE					
Funds Received through District	(15,716)	(15,607)	(14,377)	(12,801)	(27,819)
402 Site Designated	(1,322)	-	-	-	-
405 5th Grade Graduation	(174)	(174)	(174)	(153)	-
406 Book Fair	-	-	(3,977)	(339)	-
412 Field Trips	(2,930)	(3,233)	(1,958)	(1,097)	(366)
414 Music	-	-	15	(125)	(875)
417 General/Misc/Special Activities	(8,370)	(10,030)	(5,498)	(5,177)	(24,325)
421 Books	(419)	(1,268)	(1,884)	(1,643)	(1,667)
430 Teacher Fundraising	(445)	(445)	(445)	(2)	-
448 Teacher Fundraising	(133)	(133)	(133)	(133)	(133)
454 Teacher Fundraising	(1,924)	(324)	(324)	-	-
460 Teacher Fundraising	-	-	-	(258)	-
461 Teacher Fundraising	-	-	-	(500)	-
462 Teacher Fundraising	-	-	-	(615)	-
463 Teacher Fundraising	-	-	-	(200)	-
464 Teacher Fundraising	-	-	-	(91)	(113)
465 Teacher Fundraising	-	-	-	(200)	(0)
466 Teacher Fundraising	-	-	-	(520)	(126)
467 Teacher Fundraising	-	-	-	(200)	-
468 Teacher Fundraising	-	-	-	(200)	-
469 PE	-	-	-	(1)	-
470 Teacher Fundraising	-	-	-	(122)	-
471 Teacher Fundraising	-	-	-	(354)	-
472 Teacher Fundraising	-	-	-	(200)	(214)
473 Music	-	-	-	(135)	-
474 Teacher Fundraising	-	-	-	(54)	-
475 Teacher Fundraising	-	-	-	(33)	-
476 Teacher Fundraising	-	-	-	(109)	-
478 Teacher Fundraising	-	-	-	(20)	-
479 Teacher Fundraising	-	-	-	(320)	-
Funds Received through Foundation	(14,381)	(18,635)	(18,268)	(19,172)	(8,574)
638 ELL	(400)	(339)	(339)	(168)	(364)
640 Foundation Grants	-	-	-	(1,164)	(43)
648 General	(13,020)	(16,073)	(16,590)	(16,314)	(7,743)
649 Art	(0)	(750)	(750)	(928)	(425)
652 Facilities	(816)	(816)	(88)	-	-
658 Music	(144)	(157)	-	(599)	-
662 Technology	-	(500)	(500)	-	-
TOTAL BEGINNING BALANCE	(30,097)	(34,241)	(32,645)	(31,972)	(36,393)

CURRENT YEAR REVENUES

Funds Received through District	(7,062)	(8,428)	(20,732)	(41,634)	(12,631)
402 Site Designated	29	(310)	-	-	-
405 5th Grade Graduation	-	-	(8,095)	(2,635)	-
406 Book Fair	(1,287)	(3,977)	-	-	-
412 Field Trips	(1,758)	(983)	(502)	-	(300)
414 Music	-	(405)	(590)	(1,221)	-
417 General/Misc/Special Activities	(1,253)	(618)	(4,622)	(31,148)	(5,817)
421 Books	(2,793)	(2,135)	(725)	(2,205)	(284)
460 Teacher Fundraising	-	-	(390)	(155)	(300)
461 Teacher Fundraising	-	-	(500)	212	(300)

462	Teacher Fundraising	-	-	(830)	(225)	(310)
463	Teacher Fundraising	-	-	(200)	(298)	(310)
464	Teacher Fundraising	-	-	(380)	(413)	(295)
465	Teacher Fundraising	-	-	(200)	(173)	(295)
466	Teacher Fundraising	-	-	(520)	(306)	(470)
467	Teacher Fundraising	-	-	(200)	(265)	(455)
468	Teacher Fundraising	-	-	(200)	(262)	(300)
469	PE	-	-	(100)	(55)	(100)
470	Teacher Fundraising	-	-	(200)	(776)	(310)
471	Teacher Fundraising	-	-	(554)	95	(445)
472	Teacher Fundraising	-	-	(200)	(303)	(400)
473	Music	-	-	(135)	20	(135)
474	Teacher Fundraising	-	-	(250)	(582)	(450)
475	Teacher Fundraising	-	-	(200)	(301)	(310)
476	Teacher Fundraising	-	-	(200)	(322)	(315)
477	Teacher Fundraising	-	-	(200)	(235)	(295)
478	Teacher Fundraising	-	-	(220)	(47)	-
479	Teacher Fundraising	-	-	(520)	(37)	(435)
Funds Received through Grants		(298,169)	(287,807)	(224,644)	(226,014)	(125,041)
218	Title IA/ID	(5,787)	(274,162)	(13,854)	(218,057)	(4,572)
219	Title IA/ID	(292,382)	(13,645)	(209,990)	(7,337)	(120,470)
288	Inactive	-	-	(800)	(620)	-
Funds Received through Foundation		(12,934)	(11,867)	(8,980)	(1,602)	(7,670)
640	Foundation Grants	-	(1,751)	(1,164)	(477)	(3,002)
648	General	(10,489)	(10,116)	(6,361)	(1,125)	(3,035)
649	Art	(750)	-	(485)	-	(485)
652	Facilities	-	-	(0)	-	-
655	Library	-	-	-	-	(243)
658	Music	(1,195)	-	(970)	-	(906)
662	Technology	(500)	-	-	-	-
TOTAL CURRENT YEAR REVENUES		(318,165)	(308,102)	(254,357)	(269,251)	(145,342)
TOTAL ALL REVENUES		(348,262)	(342,343)	(287,002)	(301,223)	(181,735)

EXPENDITURES

Funds Received through District		7,171	9,658	22,308	26,616	27,791
402	Site Designated	1,293	310	-	-	-
405	5th Grade Graduation	-	-	8,116	2,788	-
406	Book Fair	1,287	-	3,638	339	-
412	Field Trips	1,455	2,258	1,362	732	-
414	Music	-	420	450	471	162
417	General/Misc/Special Activities	(407)	5,150	4,943	12,001	23,740
421	Books	1,943	1,520	965	2,181	542
430	Programs	-	-	443	2	-
454	Alternative All Day Kdg	1,600	-	324	-	-
460	Teacher Fundraising	-	-	132	413	82
461	Teacher Fundraising	-	-	-	288	-
462	Teacher Fundraising	-	-	215	840	191
463	Teacher Fundraising	-	-	-	498	310
464	Teacher Fundraising	-	-	289	390	118
465	Teacher Fundraising	-	-	-	373	295
466	Teacher Fundraising	-	-	-	700	269
467	Teacher Fundraising	-	-	-	465	189
468	Teacher Fundraising	-	-	-	462	-
469	PE	-	-	99	56	118

470	Teacher Fundraising	-	-	78	898	190
471	Teacher Fundraising	-	-	200	258	49
472	Teacher Fundraising	-	-	-	289	379
473	Music	-	-	-	115	254
474	Teacher Fundraising	-	-	196	636	418
475	Teacher Fundraising	-	-	167	335	173
476	Teacher Fundraising	-	-	91	431	167
477	Teacher Fundraising	-	-	200	235	94
478	Teacher Fundraising	-	-	200	67	-
479	Teacher Fundraising	-	-	200	357	52
Funds Received through Grants		298,169	287,807	224,644	226,014	125,041
218	Title IA/ID	5,787	274,162	13,854	218,057	4,572
219	Title IA/ID	292,382	13,645	209,990	7,337	120,470
283	Inactive	-	-	800	620	-
Funds Received through Foundation		8,680	12,234	8,076	10,832	2,065
638	ELL	62	-	171	125	-
640	Foundation Grants	-	1,751	-	1,641	631
648	General	7,436	9,599	6,638	7,964	1,145
649	Art	-	-	308	503	47
652	Facilities	-	727	89	-	-
655	Library	-	-	-	-	243
658	Music	1,183	157	371	599	-
662	Technology	-	-	500	-	-
TOTAL ALL EXPENDITURES		314,020	309,699	255,029	263,462	154,898
ENDING BALANCE		(34,241)	(32,645)	(31,972)	(37,761)	(26,838)

MT. VIEW ELEMENTARY		2012-13	2013-14	2014-15	2015-16	2016-17
		Actual	Actual	Actual	Actual	YTD
BEGINNING BALANCE						
Funds Received through District		(23,727)	(21,150)	(15,896)	(18,647)	(23,982)
402 Site Designated		(10,941)	(6,000)	(47)	(47)	-
412 Teacher Fundraising		(170)	(170)	(170)	(170)	(20)
413 Teacher Fundraising		(231)	(292)	(493)	(413)	(247)
414 Teacher Fundraising		(27)	(50)	(3)	-	(0)
415 Teacher Fundraising		(17)	-	(45)	-	(101)
416 PTA & PTO Miscellaneous		-	-	(463)	(1,388)	(250)
417 General/Misc/Special Activities		(2,032)	(1,944)	(1,866)	(882)	(684)
421 Lost Library Books		(2,697)	(2,852)	(2,318)	(2,071)	(1,657)
423 Garden Club		(133)	(75)	(75)	(75)	-
424 Teacher Fundraising		(37)	-	(160)	(45)	(32)
430 Programs		(238)	(348)	(143)	(260)	(296)
431 Teacher Supplies		(148)	(413)	-	(102)	(158)
432 Teacher Supplies		(124)	(124)	(124)	(124)	-
434 Staffing/Subs/Contracts		(25)	(25)	(25)	(25)	-
437 Teacher Supplies		(24)	(24)	(24)	(24)	(24)
439 Chess		(645)	(183)	(183)	(183)	(1,612)
454 Before School Care Program		(2,335)	(4,715)	(3,683)	(3,691)	(7,875)
460 Site Designated		-	(593)	(3,717)	(7,014)	(9,585)
461 Music		(494)	(513)	(6)	(140)	(100)
462 Spanish & Other Languages		-	-	(50)	(50)	(106)
463 Sparky Book Fund		(590)	(590)	(600)	(600)	-
464 Teacher Fundraising		(69)	-	-	-	(0)
465 Teacher Fundraising		(290)	(329)	(379)	(168)	(52)
466 Teacher Fundraising		(9)	(9)	(9)	(9)	(9)
467 Teacher Fundraising		(17)	(202)	(253)	(126)	(157)
468 Teacher Fundraising		(951)	(563)	(373)	(471)	(511)
469 Teacher Fundraising		(46)	(46)	(46)	(46)	-
470 Teacher Fundraising		(296)	(106)	(156)	(42)	(112)
472 Teacher Fundraising		(1,141)	(984)	(485)	(481)	(396)
Funds Received through Foundation		(6,770)	(9,470)	(16,314)	(21,687)	(23,457)
640 Foundation Grants		-	-	-	-	(2,500)
648 General		(5,869)	(8,530)	(10,499)	(15,702)	(17,474)
652 Facilities		-	-	(4,875)	(4,875)	(2,636)
655 Library		(98)	(112)	(112)	(283)	(76)
658 Music		(34)	(58)	(58)	(58)	(0)
662 Technology		(770)	(770)	(770)	(770)	(770)
TOTAL BEGINNING BALANCE		(30,497)	(30,620)	(32,210)	(40,334)	(47,438)

CURRENT YEAR REVENUES

Funds Received through District	(9,437)	(12,480)	(10,057)	(9,780)	(4,910)
402 Site Designated	3,323	(1,700)	-	-	-
413 Teacher Fundraising	(150)	(300)	(221)	(42)	(24)
414 Teacher Fundraising	(252)	-	(90)	(51)	-
415 Teacher Fundraising	(260)	(57)	(233)	(190)	-
416 PTA & PTO Miscellaneous	(4,604)	(3,455)	(1,861)	1	(340)
417 General/Misc/Special Activities	(328)	(68)	(159)	(356)	-
420 Substitute Reimbursements	-	-	(51)	-	-
421 Lost Library Books	(459)	(162)	(263)	(288)	(251)
423 Garden Club	(295)	-	-	-	-
424 Teacher Fundraising	(266)	(185)	(211)	(51)	(43)

430	Programs	(289)	(107)	(470)	(144)	-
431	Teacher Supplies	(433)	(236)	(336)	(164)	-
432	Teacher Supplies	-	-	-	63	-
439	Chess	(300)	-	-	(1,470)	(44)
454	Before School Care Program	(2,380)	(2,968)	(3,639)	(4,824)	(3,024)
461	Music	(285)	(1,650)	(591)	(320)	(170)
462	Spanish & Other Languages	-	(50)	-	(365)	(150)
463	Sparky Book Fund	-	(10)	-	-	-
464	Teacher Fundraising	(103)	(58)	(191)	(72)	-
465	Teacher Fundraising	(366)	(50)	(154)	-	-
467	Teacher Fundraising	(468)	(94)	(159)	(146)	(225)
468	Teacher Fundraising	(262)	(306)	(730)	(446)	(189)
469	Teacher Fundraising	-	-	-	46	-
470	Teacher Fundraising	-	(149)	(21)	(355)	(50)
472	Teacher Fundraising	(1,261)	(876)	(677)	(606)	(401)
Funds Received through Grants		(156,096)	(186,429)	(143,779)	(125,127)	(50,215)
218	Title IA/ID	-	(185,201)	-	(125,127)	(1,926)
219	Title IA/ID	(156,096)	(1,228)	(143,779)	-	(48,289)
Funds Received through Foundation		(10,594)	(11,117)	(14,275)	(14,511)	(3,374)
640	Foundation Grants	-	-	(2,436)	(4,378)	(2,193)
648	General	(10,472)	(6,242)	(11,013)	(8,197)	(275)
652	Facilities	-	(4,875)	-	-	-
655	Library	(98)	-	(826)	(1,451)	-
658	Music	(24)	-	-	(485)	(906)
TOTAL CURRENT YEAR REVENUES		(176,127)	(210,026)	(168,111)	(149,418)	(58,499)
TOTAL ALL REVENUES		(206,624)	(240,646)	(200,321)	(189,752)	(105,937)

EXPENDITURES

Funds Received through District		12,014	17,734	7,306	4,445	3,218
402	Site Designated	1,618	7,653	-	47	-
412	Teacher Fundraising	-	-	-	151	-
413	Teacher Fundraising	89	99	300	208	21
414	Teacher Fundraising	229	47	93	51	-
415	Teacher Fundraising	277	12	278	89	-
416	PTA & PTO Miscellaneous	4,604	2,993	936	1,136	343
417	General/Misc/Special Activities	416	146	1,143	554	(3,558)
420	Substitute Reimbursements	-	-	51	-	-
421	Lost Library Books	303	696	510	702	245
423	Garden Club	352	-	-	75	-
424	Teacher Fundraising	303	25	326	64	34
430	Programs	179	312	353	108	-
431	Teacher Supplies	168	649	234	108	-
432	Teacher Supplies	-	-	-	62	-
434		-	-	-	25	-
439	Chess	762	0	-	41	193
454	Before School Care Program	-	4,000	3,631	640	5,137
461	Music	(593)	(3,125)	(3,296)	(2,572)	-
462	Spanish & Other Languages	267	2,157	456	360	-
463	Sparky Book Fund	-	-	-	309	50
464	Teacher Fundraising	-	-	-	600	-
465	Teacher Fundraising	172	58	191	72	-
467	Teacher Fundraising	327	-	365	116	-
468	Teacher Fundraising	283	43	286	116	219
469	Teacher Fundraising	649	496	633	406	389

470	Teacher Fundraising	190	99	135	286	50
472	Teacher Fundraising	1,419	1,374	682	691	96
Funds Received through Grants		156,096	186,429	143,779	125,127	50,215
218	Title IA/ID	-	185,201	-	125,127	1,926
219	Title IA/ID	156,096	1,228	143,779	-	48,289
Funds Received through Foundation		8,859	4,273	8,902	11,701	9,349
640	Foundation Grants	965	-	2,366	1,878	3,399
648	General	7,811	4,273	5,880	5,384	5,873
652	Facilities	-	-	-	2,239	-
655	Library	83	-	656	1,657	76
658	Music	-	-	-	543	-
TOTAL ALL EXPENDITURES		176,970	208,436	159,987	141,273	62,782
ENDING BALANCE		(29,655)	(32,210)	(40,334)	(48,479)	(43,155)

WILSON ELEMENTARY	2012-13 Actual	2013-14 Actual	2014-15 Actual	2015-16 Actual	2016-17 YTD
BEGINNING BALANCE					
Funds Received through District	(18,887)	(56,171)	(55,398)	(47,070)	(38,620)
402 Site Designated	-	-	(3,125)	(6,646)	(7,818)
412 5th Grade Field Trip	(5,542)	(2,560)	(2,176)	(5,431)	(5,170)
413 All School Field Trips	(1,844)	(2,280)	(1,928)	(1,836)	(1,507)
417 Teacher Fundraising	(3,161)	(3,481)	(3,486)	(3,478)	(3,574)
421 Lost Library Books	(395)	(585)	(658)	(310)	(432)
422 Lost Mathbooks & Classroom Books	-	-	-	-	519
454 Alternative All Day Kdg	(864)	(864)	(864)	(864)	(864)
Funds Received through Foundation	(3,540)	(23,200)	(21,580)	(14,253)	(9,887)
640 Foundation Grants	-	-	-	(373)	(1,250)
648 General	(2,325)	(21,886)	(5,166)	(4,721)	(5,143)
649 Art	(580)	(580)	(15,580)	(8,324)	(3,493)
659 PE/Health	(634)	(734)	(834)	(834)	-
TOTAL BEGINNING BALANCE	(22,427)	(79,371)	(76,978)	(61,322)	(48,507)
CURRENT YEAR REVENUES					
Funds Received through District	(16,228)	(22,577)	(20,995)	(29,061)	(8,283)
402 Site Designated	2,942	-	-	-	-
412 5th Grade Field Trip	(15,743)	(18,186)	(17,514)	(19,250)	(3,690)
413 All School Field Trips	(2,306)	(1,993)	(1,632)	(3,198)	(1,414)
416 PTA & PTO Miscellaneous	(458)	(2,084)	(1,044)	(822)	(2,924)
417 Teacher Fundraising	(451)	(241)	(722)	(5,670)	(211)
421 Lost Library Books	(213)	(73)	(82)	(122)	(44)
Funds Received through Grants	(167,593)	(226,413)	(162,773)	(131,816)	(67,327)
218 Title IA/ID	(175)	(212,393)	(6,478)	(130,202)	(4,923)
219 Title IA/ID	(167,418)	(14,020)	(156,295)	(1,614)	(62,404)
Funds Received through Foundation	(22,200)	(28,175)	(7,163)	(9,117)	(11,756)
640 Foundation Grants	-	-	(894)	(877)	(2,682)
648 General	(22,100)	(13,075)	(6,269)	(6,340)	(9,055)
649 Art	-	(15,000)	-	(1,901)	(19)
659 PE/Health	(100)	(100)	-	-	-
TOTAL CURRENT YEAR REVENUES	(206,021)	(277,166)	(190,930)	(169,994)	(87,366)
TOTAL ALL REVENUES	(228,448)	(356,537)	(267,909)	(231,317)	(135,873)
EXPENDITURES					
Funds Received through District	18,265	20,110	14,667	28,779	16,635
402 Site Designated	(2,942)	(3,125)	(3,521)	(1,172)	5,593
412 5th Grade Field Trip	18,725	18,570	14,259	19,510	5,470
413 All School Field Trips	1,871	2,345	1,724	3,526	2,046
416 PTA & PTO Miscellaneous	458	2,084	1,044	822	3,174
417 Teacher Fundraising	130	236	731	5,574	351
421 Lost Library Books	23	-	430	-	-
422 Lost Mathbooks & Classroom Books	-	-	-	519	-
Funds Received through Grants	167,593	226,413	162,773	131,816	67,327
218 Title IA/ID	175	212,393	6,478	130,202	4,923
219 Title IA/ID	167,418	14,020	156,295	1,614	62,404
Funds Received through Foundation	4,179	29,795	14,491	12,956	13,949
640 Foundation Grants	1,639	-	524	-	3,895
648 General	2,540	29,795	6,711	5,390	7,202
649 Art	-	-	7,256	6,732	2,852

659 PE/Health	-	-	-	834	-
TOTAL ALL EXPENDITURES	190,036	276,318	191,931	173,551	97,911
ENDING BALANCE	(38,412)	(80,218)	(75,978)	(57,766)	(37,962)

CHELDELIN MS	2012-13 Actual	2013-14 Actual	2014-15 Actual	2015-16 Actual	2016-17 YTD
BEGINNING BALANCE					
Funds Received through District	-	(1,872)	(4,185)	(5,619)	(1,144)
401 Wash D.C. Trip	-	(231)	(130)	(875)	(607)
428 Outdoor Experience	-	(1,641)	(4,056)	(4,307)	-
462 Spanish	-	-	-	(436)	(537)
Funds Received through Foundation	(15,184)	(13,677)	(12,377)	(15,827)	(14,473)
640 Foundation Grants	-	-	-	(1,700)	-
648 General	(12,424)	(10,497)	(8,388)	(5,983)	(5,581)
649 Art	-	-	-	(1,120)	(866)
657 Social Sciences	-	-	-	(40)	-
658 Music	(142)	(142)	(142)	(127)	(612)
660 Science	(720)	(840)	(1,348)	(1,092)	(1,650)
661 Sports	(1,899)	(2,199)	(2,499)	(5,435)	(5,435)
662 Technology	-	-	-	(329)	(329)
TOTAL BEGINNING BALANCE	(15,184)	(15,549)	(16,562)	(21,445)	(15,617)
CURRENT YEAR REVENUES					
Funds Received through District	(14,350)	(4,845)	(10,789)	3,169	(1,006)
401 Wash D.C. Trip	(7,898)	(929)	(4,332)	(339)	(400)
420 Substitute Reimbursements	(1,496)	(555)	(1,089)	(188)	(95)
428 Outdoor Experience	(4,957)	(3,361)	(4,910)	4,307	-
462 Spanish	-	-	(457)	(612)	(511)
Funds Received through Grants	-	-	-	-	(2,500)
258 Robotics	-	-	-	-	(2,500)
Funds Received through Foundation	(4,609)	(6,491)	(19,844)	(19,080)	(26,069)
640 Foundation Grants	-	(889)	(3,500)	(1,979)	(3,577)
648 General	(3,507)	(4,403)	(4,224)	(16,058)	(20,422)
649 Art	-	-	(1,358)	-	-
657 Social Sciences	-	-	(40)	-	-
658 Music	-	-	(485)	(485)	-
660 Science	(801)	(900)	-	(558)	(485)
661 Sports	(300)	(300)	(5,436)	-	(1,585)
662 Technology	-	-	(4,800)	-	-
TOTAL CURRENT YEAR REVENUES	(18,959)	(11,336)	(30,632)	(15,911)	(29,575)
TOTAL ALL REVENUES	(34,143)	(26,885)	(47,194)	(37,356)	(45,193)
EXPENDITURES					
Funds Received through District	12,478	2,531	9,355	1,305	786
401 Wash D.C. Trip	7,666	1,030	3,587	607	400
420 Substitute Reimbursements	1,496	555	1,089	188	95
428 Outdoor Experience	3,316	946	4,658	-	-
462 Spanish	-	-	21	511	291
Funds Received through Grants	-	-	-	-	2,500
258 Robotics	-	-	-	-	2,500
Funds Received through Foundation	6,116	7,791	16,394	19,551	17,643
640 Foundation Grants	-	889	1,800	3,680	3,359
648 General	5,434	6,511	6,629	15,577	9,732
649 Art	-	-	238	254	292
657 Social Sciences	-	-	-	40	-
658 Music	-	-	500	-	612
660 Science	681	391	256	-	675

661 Sports	-	-	2,500	-	2,821
662 Technology	-	-	4,471	-	152
TOTAL ALL EXPENDITURES	18,594	10,323	25,749	20,856	20,929
ENDING BALANCE	(15,549)	(16,562)	(21,445)	(16,500)	(24,264)

LINUS PAULING MS	2012-13 Actual	2013-14 Actual	2014-15 Actual	2015-16 Actual	2016-17 YTD
BEGINNING BALANCE					
Funds Received through District	-	(3,973)	(8,509)	(10,430)	(10,430)
428 Outdoor Experience	-	(3,973)	(8,509)	(10,430)	(10,430)
Funds Received through Foundation	(18,551)	(19,857)	(22,819)	(12,449)	(31,296)
637 Textbooks	(200)	(200)	(200)	-	-
639 Student/Family Social Services	(429)	(234)	(234)	(229)	-
640 Foundation Grants	-	-	(1,624)	(1,000)	(10,200)
648 General	(11,311)	(12,504)	(15,548)	(1,069)	(2,141)
655 Library	(30)	-	-	-	-
657 Social Sciences	(1,467)	(1,417)	(410)	(410)	(410)
658 Music	(2,872)	(2,145)	(355)	(195)	(0)
660 Science	(1,515)	(2,485)	(1,102)	(513)	(802)
661 Sports	(502)	(646)	(3,119)	(9,032)	(17,743)
662 Technology	(226)	(226)	(226)	-	-
TOTAL BEGINNING BALANCE	(18,551)	(23,830)	(31,329)	(22,879)	(41,726)
CURRENT YEAR REVENUES					
Funds Received through District	(4,781)	(5,155)	(4,628)	-	(95)
420 Substitute Reimbursements	(274)	-	(545)	-	(95)
428 Outdoor Experience	(4,506)	(5,155)	(4,083)	-	-
Funds Received through Grants	-	-	-	-	-
Funds Received through Foundation	(25,476)	(44,099)	(33,205)	(37,129)	(17,820)
639 Student/Family Social Services	-	-	-	229	-
640 Foundation Grants	-	(9,700)	(2,750)	(13,005)	(1,833)
648 General	(20,319)	(28,772)	(20,603)	(14,433)	(12,594)
658 Music	(408)	(275)	-	-	-
660 Science	(2,303)	(550)	(475)	(289)	-
661 Sports	(2,447)	(4,802)	(9,377)	(9,632)	(3,393)
TOTAL CURRENT YEAR REVENUES	(30,257)	(49,254)	(37,833)	(37,129)	(17,915)
TOTAL ALL REVENUES	(48,808)	(73,084)	(69,161)	(60,009)	(59,641)
EXPENDITURES					
Funds Received through District	808	619	2,707	-	285
420 Substitute Reimbursements	274	-	545	-	285
428 Outdoor Experience	533	619	2,162	-	-
Funds Received through Grants	-	-	-	-	-
Funds Received through Foundation	28,998	41,136	43,575	15,440	30,592
637 Textbooks	-	-	200	-	-
639 Student/Family Social Services	195	-	5	-	-
640 Foundation Grants	4,827	8,076	3,342	3,337	10,630
648 General	19,126	25,727	35,113	10,987	1,336
655 Library	30	-	-	-	-
657 Social Sciences	50	1,006	-	-	-
658 Music	1,134	2,065	160	195	-
660 Science	1,332	1,932	1,064	-	-
661 Sports	2,302	2,329	3,463	921	18,627
662 Technology	-	-	226	-	-
TOTAL ALL EXPENDITURES	29,805	41,755	46,282	15,440	30,877
ENDING BALANCE	(19,003)	(31,329)	(22,879)	(44,569)	(28,764)

CORVALLIS HS		2012-13	2013-14	2014-15	2015-16	2016-17
		Actual	Actual	Actual	Actual	YTD
BEGINNING BALANCE						
Funds Received through District		(27,292)	(39,699)	(54,813)	(70,340)	(69,676)
419	LBCC Rentals	(624)	(1,057)	(1,519)	(1,789)	(1,892)
420	Substitute Reimbursements	(913)	(823)	(1,005)	(1,071)	(1,071)
421	Lost Library Books	-	-	(119)	(78)	(268)
430	Link Crew	(133)	(1,132)	(1,155)	(2,652)	(2,690)
431	Physics	(192)	(283)	(366)	(633)	(1,047)
434	Lifeskills	(58)	(195)	(195)	(195)	(151)
453	Health	(4,137)	(4,434)	(4,232)	(3,962)	(3,962)
472	Social Studies	(2,355)	(3,114)	(4,457)	(3,951)	(4,110)
473	Foreign Language	(2,457)	(1,744)	(1,684)	(1,912)	(2,915)
474	English	(2,723)	(7,425)	(11,137)	(19,636)	(20,531)
475	Science	(3,247)	(2,576)	(3,733)	(3,758)	(3,519)
476	FACS	(2,220)	(4,900)	(6,184)	(7,214)	(1,757)
477	Shop	(3,880)	(5,245)	(9,390)	(12,139)	(13,493)
478	Photo	(3,176)	(3,944)	(5,961)	(6,350)	(6,790)
479	Art	(672)	(2,306)	(2,303)	(2,198)	(1,798)
480	Ceramics	-	(15)	(862)	(2,330)	(2,835)
481	Health	(503)	(503)	(508)	(511)	(845)
487	Math	(3)	(3)	(3)	(3)	(3)
797	Books & Lockers	-	-	-	42	-
Funds Received through Foundation		(74,490)	(64,916)	(64,009)	(76,233)	(83,031)
639	Student/Family Social Services	(1,452)	(1,192)	(1,032)	(607)	-
640	Foundation Grants	-	-	(1,718)	(16,639)	(15,981)
647	Social Sciences	(762)	(787)	(787)	(1,262)	(1,262)
648	General	(16,452)	(13,860)	(13,364)	(7,631)	(6,587)
649	Art	(2,222)	(2,722)	(3,012)	(3,012)	(3,012)
650	Drama	(3,097)	(4,147)	(4,197)	(2,374)	(4,396)
651	Extra Curricular Activities	(9,901)	(3,569)	(3,638)	(3,638)	(4,608)
652	Facilities	(3,515)	(3,515)	(3,515)	(3,515)	(3,515)
654	Foreign Language	(1,301)	(1,434)	(2,201)	(2,771)	(3,256)
655	Library	(671)	(272)	(715)	(667)	(1,142)
656	Literacy	(508)	(548)	(596)	(475)	(475)
657	Math	(4,209)	(2,488)	(2,770)	(3,464)	(2,641)
658	Music	(2,687)	(4,388)	(6,072)	(6,921)	(5,276)
659	PE/Health	(154)	(154)	(154)	(154)	(154)
660	Science	(3,691)	(4,463)	(4,124)	(2,950)	(3,294)
661	Sports	(23,008)	(16,486)	(9,223)	(10,663)	(14,194)
662	Technology	(69)	(69)	(69)	(69)	(69)
663	Golf	(791)	-	-	-	-
664	Robotics	-	(4,823)	(6,821)	(9,422)	(13,171)
TOTAL BEGINNING BALANCE		(101,782)	(104,615)	(118,822)	(146,573)	(152,707)
CURRENT YEAR REVENUES						
Funds Received through District		(77,657)	(81,759)	(82,575)	(61,508)	(36,133)
419	LBCC Rentals	(447)	(500)	(289)	(109)	(24)
420	Substitute Reimbursements	(3,407)	(660)	(2,036)	(404)	(991)
421	Lost Library Books	(189)	(182)	(67)	-	(7)
430	Link Crew	(230)	(419)	(459)	(190)	-
431	Physics	(1,465)	(1,345)	(1,575)	(1,695)	-
434	Lifeskills	(211)	(361)	(632)	(505)	(688)
452	Perkins-Regional Funds	(2,019)	(4,367)	(160)	(19)	(2,600)

453 Health	(1,204)	-	-	-	-
455 Perkins-Building Funds	(28,782)	(24,098)	(23,902)	(22,884)	(26,254)
472 Social Studies	(627)	-	-	-	-
473 Foreign Language	(5,407)	(2,655)	(7,663)	(5,288)	(1,613)
474 English	(4,540)	(4,635)	(3,445)	(2,492)	(1,495)
475 Science	(7,210)	(10,967)	(12,532)	(10,839)	(65)
476 FACS	(3,512)	(4,003)	(3,747)	(1,275)	-
477 Shop	(8,068)	(9,410)	(9,888)	(6,596)	(648)
478 Photo	(4,240)	(6,490)	(4,991)	(2,018)	(105)
479 Art	(3,102)	(3,795)	(2,881)	(2,195)	(70)
480 Ceramics	(2,983)	(5,127)	(6,207)	(3,360)	(400)
481 Health	(15)	(2,740)	(2,099)	(1,262)	(693)
487 Math	-	(5)	(3)	(334)	(480)
797 Books & Lockers	-	-	-	(42)	-
Funds Received through Grants	(9,190)	(8,810)	(2,500)	(4,733)	(30,132)
258 Robotics	-	(3,000)	(2,500)	-	(4,169)
271 CTE Career Pathway	-	-	-	-	(2,253)
275 Nike College & Career Readiness	-	-	-	(183)	(16,961)
278 Inactive	(5,000)	-	-	-	-
280 Youth Transition Program	(4,190)	(5,810)	-	-	-
281 CHS - LBHEA Grant	-	-	-	(3,376)	(6,749)
282 Corvallis Environmental Center	-	-	-	(1,173)	-
Funds Received through Foundation	(46,313)	(58,278)	(57,476)	(46,867)	(41,453)
639 Student/Family Social Services	(250)	-	-	340	-
640 Foundation Grants	-	(15,507)	(30,424)	(6,901)	(2,392)
647 Social Sciences	(25)	-	(475)	-	-
648 General	(2,055)	(10,491)	(3,656)	(12,628)	(14,395)
649 Art	(500)	(290)	-	-	435
650 Drama	(1,050)	(50)	1,824	(3,433)	(398)
651 Extra Curricular Activities	3,691	(288)	-	(970)	(49)
654 Foreign Language	(391)	(1,137)	(970)	(485)	(146)
655 Library	(440)	(444)	(485)	(475)	(1,057)
656 Literacy	(40)	(48)	-	-	-
657 Math	(274)	(282)	(888)	(238)	(238)
658 Music	(5,023)	(5,542)	(7,357)	(4,389)	(7,338)
660 Science	(1,547)	(317)	(427)	(576)	(286)
661 Sports	(32,511)	(14,885)	(12,017)	(13,363)	(10,015)
662 Technology	-	-	-	-	69
663 Golf	791	-	-	-	-
664 Robotics	(6,689)	(8,998)	(2,601)	(3,749)	(5,646)
TOTAL CURRENT YEAR REVENUES	(133,161)	(148,847)	(142,551)	(113,107)	(107,719)
TOTAL ALL REVENUES	(234,943)	(253,462)	(261,373)	(259,680)	(260,425)

EXPENDITURES

Funds Received through District	65,250	66,645	67,049	62,172	68,466
419 LBCC Rentals	14	37	20	6	6
420 Substitute Reimbursements	3,407	660	2,036	404	991
421 Lost Library Books	279	-	-	-	1,078
430 Link Crew	230	300	500	-	-
431 Physics	465	1,322	78	1,657	2,030
434 Lifeskills	119	278	364	91	1,354
452 Perkins-Regional Funds	2,019	4,367	160	19	3,645
453 Health	1,067	-	-	44	122
455 Perkins-Building Funds	28,782	24,098	23,902	22,884	26,254

461	Choir/Music Fundraising	-	-	-	-	832
472	Social Studies	329	202	270	-	191
473	Foreign Language	4,649	1,312	8,169	5,130	7,891
474	English	5,253	4,695	3,217	1,489	1,654
475	Science	2,508	7,254	4,032	9,945	5,744
476	FACS	4,183	2,846	3,722	1,514	1,581
477	Shop	5,388	8,126	8,858	12,053	2,611
478	Photo	2,874	2,346	2,242	664	2,361
479	Art	2,334	1,778	2,493	1,755	6,227
480	Ceramics	1,349	5,130	6,312	3,760	2,235
481	Health	-	1,893	631	757	960
487	Math	-	-	-	-	700
797	Books & Lockers	-	-	42	-	-
Funds Received through Grants		9,190	8,810	2,500	4,733	30,132
258	Robotics	-	3,000	2,500	-	4,169
271	CTE Career Pathway	-	-	-	-	2,253
275	Nike College & Career Readiness	-	-	-	183	16,961
278	Inactive	5,000	-	-	-	-
280	Youth Transition Program	4,190	5,810	-	-	-
281	CHS - LBHEA Grant	-	-	-	3,376	6,749
282	Corvallis Environmental Center	-	-	-	1,173	-
Funds Received through Foundation		62,690	59,186	45,251	34,671	30,617
639	Student/Family Social Services	510	159	425	268	-
640	Foundation Grants	6,803	13,789	15,502	7,381	7,297
647	Social Sciences	-	-	-	-	69
648	General	4,647	10,987	9,389	8,452	5,349
649	Art	-	-	-	-	826
650	Drama	-	-	-	1,411	281
651	Extra Curricular Activities	2,641	219	-	-	-
654	Foreign Language	258	369	401	-	-
655	Library	840	-	630	-	1,936
656	Literacy	-	-	121	-	18
657	Math	1,995	-	193	1,061	438
658	Music	3,321	3,859	6,411	6,035	3,368
660	Science	775	656	1,601	231	1,647
661	Sports	39,033	22,148	10,578	9,832	9,389
664	Robotics	1,866	7,000	-	-	-
TOTAL ALL EXPENDITURES		137,130	134,641	114,800	101,575	129,216
ENDING BALANCE		(97,813)	(118,822)	(146,573)	(158,105)	(131,210)

CRESCENT VALLEY HS		2012-13	2013-14	2014-15	2015-16	2016-17
		Actual	Actual	Actual	Actual	YTD
BEGINNING BALANCE						
Funds Received through District		(42,718)	(77,870)	(87,823)	(71,130)	(81,589)
400 Salary Reimb-Reconnecting Youth	(75)	-	-	-	-	-
407 Admin/Principal Account	(900)	(1,092)	(1,080)	(1,319)	(1,552)	
412 Field Trips	(1,092)	(1,297)	(1,015)	(1,015)	(765)	
413 Engineering	(326)	(660)	(1,243)	(1,706)	(6,390)	
414 Teacher Fundraising	(630)	(1,000)	(1,337)	(1,059)	(2,311)	
415 Teacher Fundraising	(549)	(258)	(498)	(58)	(181)	
417 General/Misc/Special Activities	(354)	(489)	(2,152)	(502)	(1,850)	
421 Lost Library Books	(604)	(2,201)	(3,921)	(5,285)	(7,347)	
422 Lost Math & Class books	(743)	(754)	(754)	(761)	(734)	
423 Teacher Fundraising	(899)	(717)	(713)	(598)	(195)	
424 Social Studies Field Trip	(314)	(224)	(222)	(145)	(52)	
430 Link Crew	(272)	(286)	(496)	(616)	(206)	
433 Career Counseling	(2,931)	(4,129)	(3,456)	(5,895)	(12,283)	
435 Staffing/Subs/Contracts	(73)	(73)	(73)	(73)	(73)	
443 Volunteering	(2,060)	(4,537)	(4,178)	(4,646)	(929)	
448 Drama Fundraising	(5,639)	(12,573)	(17,732)	(10,383)	(10,433)	
453 Health	(45)	(50)	(50)	(517)	(496)	
454 Preschool	(2,118)	(4,828)	(4,143)	(6,950)	(9,461)	
455 Perkins - Building Funds	(9)	-	1,595	-	-	
471 Teacher Fundraising	(49)	(49)	(49)	(49)	(49)	
472 Copy Club	(250)	(416)	(455)	(518)	(636)	
477 Jewelry	(731)	(860)	(991)	(930)	(206)	
478 Photo	(628)	(2,436)	(2,791)	(2,868)	(1,655)	
479 Art	-	(2,122)	(1,022)	(2,072)	(2,537)	
480 Ceramics	(815)	(2,160)	(3,440)	(2,797)	(677)	
482 Registration	(4,813)	(16,729)	(19,555)	(2,615)	(2,092)	
483 Outdoor Rec	(338)	(135)	(658)	(760)	(450)	
484 Honor Society	(2,628)	(2,438)	(3,659)	(3,191)	(4,394)	
485 Student Fin Aid	(166)	(1,349)	(1,349)	(1,349)	(1,349)	
486 Spanish Workbooks	(1,691)	(1,719)	(1,741)	(1,744)	(1,525)	
487 Vocab Workbooks	(83)	(17)	(134)	(134)	(134)	
488 College Scholarships	(2,053)	(2,053)	(2,010)	(2,210)	(2,210)	
489 Athletic/Activities Scholarships	(4,849)	(4,849)	(4,849)	(4,799)	(4,799)	
490 Student Copy Machines	(14)	(19)	(13)	(13)	(13)	
491 Sound System	(150)	(150)	(500)	(283)	(383)	
492 Family Studies	(2,358)	(2,171)	(1,394)	(1,112)	(874)	
493 Electronics	(472)	(662)	(400)	(551)	(577)	
494 Sculpture - Art	(399)	(421)	(49)	(146)	(413)	
495 Mechatronics	(154)	-	-	-	-	
496 Glass Art	-	(1,350)	(381)	(496)	(393)	
497 Fiber Arts	(445)	(595)	(916)	(966)	(966)	
Funds Received through Foundation		(68,736)	(89,845)	(62,791)	(80,663)	(55,239)
640 Foundation Grants	-	-	-	(13,902)	(6,530)	
643 Foundation - Parent Organization	(634)	(1,067)	(1,285)	(730)	(377)	
648 General	(17,148)	(11,846)	(13,462)	(13,613)	(8,356)	
649 Art	-	(250)	(560)	(25)	(352)	
650 Drama	(31)	(31)	-	-	-	
651 Extra Curricular Activities	(4,983)	(29,266)	(4,662)	(4,531)	(441)	
654 Foreign Language	(384)	(600)	(600)	(629)	(1,123)	
655 Library	-	(98)	(248)	(429)	(534)	

657 Math	(95)	(95)	(95)	(527)	(527)
658 Music	(5,457)	(1,833)	(1,997)	(4,364)	(8,254)
660 Science	(2,462)	(1,695)	(2,210)	(1,958)	(1,927)
661 Sports	(26,014)	(32,326)	(28,286)	(33,167)	(21,636)
662 Technology	(246)	(276)	(276)	(276)	(276)
663 Golf	(6,645)	-	-	-	-
664 Robotics	(4,639)	(10,463)	(9,110)	(6,513)	(4,905)
TOTAL BEGINNING BALANCE	(111,454)	(167,715)	(150,614)	(151,793)	(136,828)

CURRENT YEAR REVENUES

Funds Received through District	(131,358)	(107,860)	(114,011)	(109,600)	(67,808)
407 Admin/Principal Account	(1,419)	(152)	(239)	(234)	(92)
412 Field Trips	(2,146)	(360)	-	(1,790)	-
413 Engineering	(663)	(1,821)	(2,004)	(8,622)	(330)
414 Teacher Fundraising	(2,095)	(2,692)	(2,493)	(3,202)	(169)
415 Teacher Fundraising	(731)	(240)	(723)	(586)	-
417 General/Misc/Special Activities	(135)	(1,850)	(645)	(1,645)	(915)
420 Substitute Reimbursement	(1,825)	(510)	(703)	-	-
421 Lost Library Books	(2,481)	(3,050)	(2,664)	(2,471)	(1,985)
422 Lost Math & Class books	(11)	-	(7)	(56)	-
423 Teacher Fundraising	(1,879)	(1,248)	(1,046)	(1,418)	(1,454)
424 Social Studies Field Trip	(240)	(330)	(200)	(320)	(250)
430 Link Crew	(128)	(298)	(120)	(40)	-
433 Career Counseling	(30,302)	(20,422)	(24,116)	(26,939)	(15,041)
443 Volunteering	(2,477)	(2,539)	(2,389)	(2,440)	(2,079)
448 Drama Fundraising	(16,549)	(15,021)	(12,096)	(50)	(230)
452 Perkins - Regional Funds	(640)	(3,123)	(170)	-	(1,154)
453 Health	(5)	-	(500)	-	(271)
454 Preschool	(5,217)	(4,531)	(5,598)	(5,076)	(3,855)
455 Perkins - Building Funds	(18,292)	(11,490)	(19,995)	(20,133)	(22,325)
472 Copy Club	(332)	(280)	(272)	(341)	(312)
477 Jewelry	(2,015)	(1,600)	(2,200)	(1,550)	(50)
478 Photo	(3,675)	(4,213)	(2,447)	(3,188)	(40)
479 Art	(3,491)	(2,325)	(3,800)	(2,875)	(300)
480 Ceramics	(5,352)	(5,318)	(5,620)	(3,996)	(616)
482 Registration	(14,563)	(13,858)	(13,282)	(13,330)	(13,250)
483 Outdoor Rec	(1,350)	(1,240)	(840)	(1,240)	-
484 Honor Society	(4,837)	(2,960)	(2,706)	(2,445)	(820)
485 Student Fin Aid	(1,343)	-	-	-	-
486 Spanish Workbooks	(28)	(22)	(3)	(11)	-
487 Vocab Workbooks	(1,215)	(117)	-	-	-
488 College Scholarships	(750)	(750)	(950)	(750)	-
490 Student Copy Machines	(10)	-	-	-	-
491 Sound System	-	(350)	(150)	(100)	-
492 Family Studies	(2,001)	(2,195)	(3,037)	(2,276)	(1,115)
493 Electronics	(1,035)	(881)	(843)	(26)	(82)
494 Sculpture - Art	(517)	(250)	(615)	(725)	-
495 Mechatronics	(10)	-	-	-	-
496 Glass Art	(1,449)	(1,000)	(1,488)	(1,725)	(1,072)
497 Fiber Arts	(150)	(825)	(50)	-	-
Funds Received through Grants	(1,333)	(3,000)	-	(19,339)	(29,022)
233 Inactive	-	-	-	(15,274)	-
234 Inactive	-	-	-	(2,000)	-
258 Robotics	-	(3,000)	-	-	-
259 Inactive	-	-	-	(1,000)	-

272	CTE Career Pathway	-	-	-	-	(24,215)
273	CTE Career Pathway	-	-	-	-	(4,807)
282	Corvallis Environmental Center	-	-	-	(1,065)	-
283	Inactive	(1,333)	-	-	-	-
Funds Received through Foundation		(107,474)	(60,082)	(82,591)	(61,985)	(45,504)
640	Foundation Grants	(300)	(12,309)	(28,586)	1,846	(2,457)
643	Foundation - Parent Organization	(6,331)	(6,037)	(6,045)	(5,631)	(3,018)
648	General	(3,917)	(3,885)	(1,929)	(4,622)	164
649	Art	(250)	(310)	(616)	(1,251)	(150)
651	Extra Curricular Activities	(43,284)	284	(4,537)	-	-
654	Foreign Language	(842)	-	(29)	(534)	(437)
655	Library	(98)	(150)	(190)	(190)	(238)
657	Math	-	-	(650)	-	-
658	Music	(1,505)	(525)	(5,560)	(12,365)	(2,166)
660	Science	(4,596)	(1,740)	(2,996)	(1,773)	(485)
661	Sports	(28,242)	(20,829)	(22,627)	(27,524)	(20,976)
662	Technology	(500)	-	-	-	(970)
663	Golf	6,645	-	-	-	-
664	Robotics	(24,254)	(14,582)	(8,827)	(9,942)	(14,773)
TOTAL CURRENT YEAR REVENUES		(240,164)	(170,943)	(196,602)	(190,923)	(142,334)
TOTAL ALL REVENUES		(351,618)	(338,657)	(347,216)	(342,716)	(279,162)

EXPENDITURES

Funds Received through District		96,206	97,907	130,705	99,141	65,196
400	Salary Reimb-Reconnecting Youth	75	-	-	-	-
407	Admin/Principal Account	1,227	164	-	-	-
412	Field Trips	1,941	642	-	2,040	-
413	Engineering	328	1,238	1,541	3,938	5,927
414	Teacher Fundraising	1,725	2,355	2,771	1,950	2,251
415	Teacher Fundraising	1,022	-	1,163	464	181
417	General/Misc/Special Activities	-	186	2,295	297	1,017
420	Substitute Reimbursement	1,825	510	703	-	-
421	Lost Library Books	884	1,329	1,300	408	78
422	Lost Math & Class books	-	-	-	83	734
423	Teacher Fundraising	2,061	1,253	1,161	1,820	1,349
424	Social Studies Field Trip	330	332	277	413	200
430	Link Crew	115	88	-	450	-
433	Career Counseling	29,104	21,096	21,677	20,551	4,285
435	Staffing/Subs/Contracts	-	2,898	1,921	6,157	1,395
443	Volunteering	9,615	9,862	19,444	-	5
448	Drama Fundraising	640	3,123	170	-	979
453	Health	-	-	33	21	315
454	Preschool	2,506	5,217	2,791	2,565	2,035
455	Perkins - Building Funds	18,300	13,085	18,400	20,133	24,525
471	Teacher Fundraising	-	-	-	-	48
472	Copy Club	166	242	209	223	11
477	Jewelry	1,885	1,470	2,260	2,274	206
478	Photo	1,867	3,858	2,369	4,401	1,613
479	Art	1,369	3,425	2,750	2,410	1,604
480	Ceramics	4,007	4,038	6,263	6,115	1,235
482	Registration	2,648	11,032	30,223	13,853	8,777
483	Outdoor Rec	1,553	717	738	1,550	127
484	Honor Society	5,027	1,739	3,174	1,242	1,109
485	Student Fin Aid	160	-	-	-	-

486	Spanish Workbooks	-	-	-	230	1,088
487	Vocab Workbooks	1,281	-	-	-	-
488	College Scholarships	750	793	750	750	-
489	Athletic/Activities Scholarships	-	-	50	-	-
490	Student Copy Machines	5	6	1	-	-
491	Sound System	-	-	367	-	-
492	Family Studies	2,187	2,973	3,318	2,515	1,644
493	Electronics	846	1,142	693	-	584
494	Sculpture - Art	495	623	518	458	241
495	Mechatronics	164	-	-	-	-
496	Glass Art	99	1,969	1,373	1,828	666
497	Fiber Arts	-	504	-	-	966
Funds Received through Grants		1,333	3,000	-	19,339	29,022
233	Inactive	-	-	-	15,274	-
234	Inactive	-	-	-	2,000	-
258	Robotics	-	3,000	-	-	-
259	Inactive	-	-	-	1,000	-
272	CTE Career Pathway	-	-	-	-	24,215
273	CTE Career Pathway	-	-	-	-	4,807
282	Corvallis Environmental Center	-	-	-	1,065	-
283	Inactive	1,333	-	-	-	-
Funds Received through Foundation		87,937	87,136	64,719	87,409	52,517
640	Foundation Grants	1,872	12,309	14,684	5,543	6,620
643	Foundation - Parent Organization	5,897	5,820	6,600	5,983	3,060
648	General	9,219	2,268	1,779	9,862	1,105
649	Art	-	-	1,151	924	352
650	Drama	-	31	-	-	-
651	Extra Curricular Activities	19,001	24,320	4,668	4,090	-
654	Foreign Language	626	-	-	40	921
655	Library	-	-	9	85	352
657	Math	-	-	217	-	-
658	Music	5,129	362	3,193	8,475	1,182
660	Science	5,363	1,224	3,248	1,804	1,926
661	Sports	21,930	24,868	17,746	38,955	25,302
662	Technology	470	-	-	-	-
663	Golf	-	-	-	99	-
664	Robotics	18,430	15,935	11,424	11,549	11,697
TOTAL ALL EXPENDITURES		185,476	188,043	195,423	205,888	146,736
ENDING BALANCE		(166,142)	(150,614)	(151,793)	(136,828)	(132,426)

ALTERNATIVE PATHWAYS	2012-13 Actual	2013-14 Actual	2014-15 Actual	2015-16 Actual	2016-17 YTD
BEGINNING BALANCE					
Funds Received through District	(6,055)	(6,379)	(22,575)	(61,046)	(93,879)
411 Summer School Credit Clinic	(2,143)	(2,143)	(10,243)	(18,190)	(19,599)
417 General/Misc/Special Activities	(2,974)	(3,298)	(3,517)	(4,107)	(4,625)
419 Urban Farm	(938)	(938)	(938)	(938)	(938)
438 Online Classes - Tuition Paid	-	-	(7,877)	(37,811)	(68,718)
Funds Received through Foundation	(3,313)	(4,241)	(10,968)	(20,877)	(21,624)
636 Alternative Education	(248)	(248)	(2)	(2)	-
640 Foundation Grants	-	-	(1,000)	(9,241)	(8,000)
648 General	(2,720)	(3,806)	(9,778)	(11,171)	(13,480)
655 Library	(345)	(187)	(187)	(187)	(144)
659 PE/Health	-	-	-	(276)	-
TOTAL BEGINNING BALANCE	(9,367)	(10,620)	(33,543)	(81,924)	(115,503)
CURRENT YEAR REVENUES					
Funds Received through District	(753)	(17,385)	(40,780)	(48,322)	(5,211)
411 Summer School Credit Clinic	-	(8,100)	(8,310)	(6,600)	170
417 General/Misc/Special Activities	(753)	(1,407)	(2,228)	(9,707)	(97)
419 Urban Farm	-	-	-	-	(15)
438 Online Classes - Tuition Paid	-	(7,877)	(30,242)	(32,015)	(5,269)
Funds Received through Grants	-	-	-	(51,253)	(33,172)
280 Youth Transition Program	-	-	-	(51,253)	(33,172)
Funds Received through Foundation	(2,222)	(13,256)	(23,572)	(20,062)	(16,771)
636 Alternative Education	-	-	-	2	-
640 Foundation Grants	-	(2,973)	(16,495)	(9,767)	(6,134)
648 General	(2,222)	(9,283)	(5,777)	(10,573)	(10,637)
655 Library	-	(1,000)	-	-	-
659 PE/Health	-	-	(1,301)	276	-
TOTAL CURRENT YEAR REVENUES	(2,975)	(30,640)	(64,352)	(119,636)	(55,155)
TOTAL ALL REVENUES	(12,343)	(41,261)	(97,895)	(201,560)	(170,658)
EXPENDITURES					
Funds Received through District	429	1,189	2,309	15,489	23,523
50 General Instruction	-	-	-	-	83
411 Summer School Credit Clinic	-	-	363	5,191	8,019
417 General/Misc/Special Activities	429	1,189	1,638	9,190	1,312
419 Urban Farm	-	-	-	-	-
438 Online Classes - Tuition Paid	-	-	308	1,109	14,109
Funds Received through Grants	-	-	-	51,253	33,172
280 Youth Transition Program	-	-	-	51,253	33,172
Funds Received through Foundation	1,294	6,529	13,663	18,113	18,740
636 Alternative Education	-	246	-	-	-
640 Foundation Grants	-	1,973	8,254	11,008	10,007
648 General	1,136	4,311	4,384	7,062	8,733
655 Library	157	-	-	43	-
659 PE/Health	-	-	1,025	-	-
TOTAL ALL EXPENDITURES	1,722	7,718	15,971	84,855	75,435
ENDING BALANCE	(10,620)	(33,543)	(81,924)	(116,705)	(95,222)

2017-18 Proposed Budget School Staffing FTE Allocations - General Fund

amounts in FTE

Grade Span	School	Classroom FTE			Grades K-6 Enrichment ¹				Basic School Support										Total Allocations	
		Projected Enrollment	Direct Instruction	Average Class Size	PE	Music	Art	Total	Principal	Assistant Principal	Counselor	Instructional Support ²	Administrative Support ³	Student Support ⁴	Assessment	Library	Technology	Athletics		Total
K-5	Adams	434	17.00	26	0.80	0.80	0.40	2.00	1.00	-	0.50	0.75	1.88	2.75	0.25	0.25	0.81	-	8.19	27.19
K-5	Franklin K-5	170	6.00	28	0.30	0.30	0.20	0.80	0.50	-	0.25	0.25	0.86	1.50	0.13	0.13	0.41	-	4.03	10.83
K-5	Garfield	455	19.00	24	0.90	0.90	0.50	2.30	1.00	-	1.00	1.00	2.13	2.75	0.81	0.50	0.81	-	10.00	31.30
K-5	Hoover	424	16.00	27	0.80	0.80	0.40	2.00	1.00	-	0.50	0.75	1.88	2.75	0.25	0.25	0.81	-	8.19	26.19
K-5	Jefferson	343	13.00	26	0.70	0.70	0.40	1.80	1.00	-	0.50	0.75	1.75	2.75	0.25	0.25	0.81	-	8.06	22.86
K-5	Lincoln	362	15.00	24	0.70	0.70	0.40	1.80	1.00	-	1.00	1.00	2.00	2.75	0.81	0.50	0.81	-	9.87	26.67
K-5	Mountain View	336	13.00	26	0.70	0.70	0.40	1.80	1.00	-	0.50	0.75	1.75	2.75	0.25	0.25	0.81	-	8.06	22.86
K-5	Wilson	410	16.00	26	0.80	0.80	0.40	2.00	1.00	-	0.50	0.75	1.88	2.75	0.25	0.25	0.81	-	8.19	26.19
	K-5 Total	2,934	115.00	26	5.70	5.70	3.10	14.50	7.50	-	4.75	6.00	14.13	20.75	3.00	2.38	6.08	-	64.59	194.09
6-8	Cheldelin	561	20.17	31	0.33	0.33	-	0.66	1.00	1.00	1.00	0.84	3.00	4.75	0.25	1.00	0.81	-	13.65	34.48
6-8	Franklin 6-8	162	6.45	28	0.17	0.17	-	0.34	0.50	-	0.25	-	0.98	1.75	0.13	0.13	0.40	-	5.42	12.21
6-8	Linus Pauling	724	27.83	30	0.33	0.33	-	0.66	1.00	1.00	1.70	1.18	4.66	5.32	0.43	1.00	0.81	-	15.83	44.32
	6-8 Total	1,447	54.45	30	0.83	0.83	-	1.66	2.50	2.00	2.95	2.02	8.64	11.82	0.81	2.13	2.02	-	34.89	91.00
9-12	Corvallis	1,122	43.02	30	-	-	-	-	1.00	2.00	4.00	1.01	4.88	4.96	0.50	1.00	1.00	2.10	22.45	65.47
9-12	Crescent Valley	956	33.70	33	-	-	-	-	1.00	2.00	3.25	0.67	4.88	6.65	0.50	1.00	1.00	1.50	22.45	56.15
	9-12 Total	2,078	76.72	32	-	-	-	-	2.00	4.00	7.25	1.68	9.76	11.61	1.00	2.00	2.00	3.60	44.90	121.62
TOTAL			246.17		6.53	6.53	3.10	16.16	12.00	6.00	14.95	9.70	32.53	44.18	4.81	6.51	10.10	3.60	144.38	406.71

¹ Grades K-6 Enrichment is based on number of classrooms. Each classroom is allocated 70 minutes per class, per week for PE/music and 35 minutes per class, per week for art.

² Instructional support includes RTI Specialists, Instructional Coaches, and TOSAs (Dean of Students, DLI Coordinator, AVID Coordinator, Mentor).

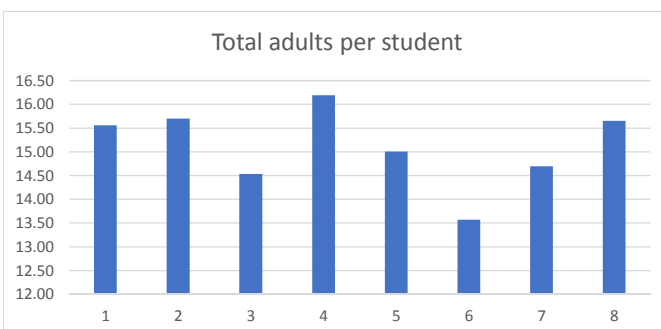
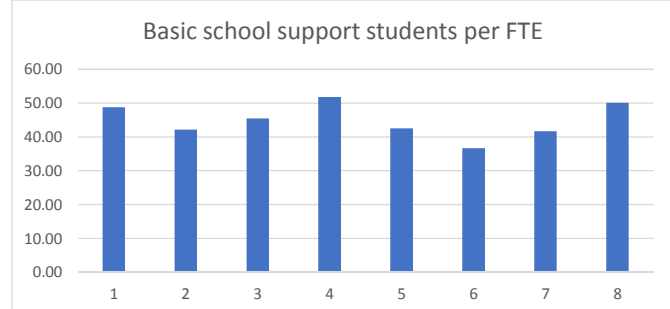
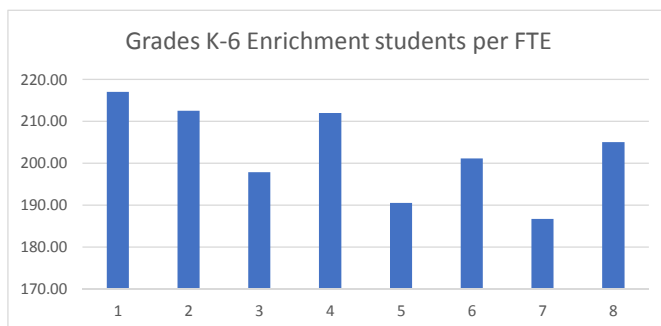
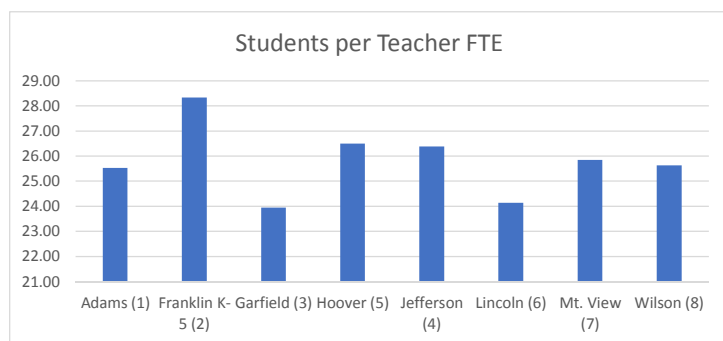
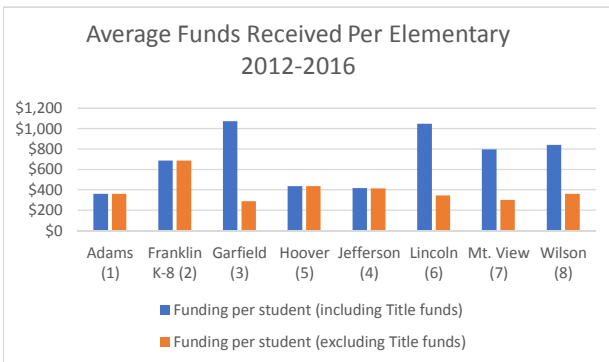
³ Administrative support includes Administrative Assistants, Registrars, and Fiscal Clerks.

⁴ Student support includes Student/Campus Behavior Support, Educational Assistants, Health Services Assistants, and Career Center Specialists.

Corvallis School District Elementary School Comparison Data - Funding and Staffing

2012-2016 average funds received	Adams (1)	Franklin K-8 (2)	Garfield (3)	Hoover (5)	Jefferson (4)	Lincoln (6)	Mt. View (7)	Wilson (8)
Principal's Discretionary	\$84,466	\$100,008	\$108,925	\$95,372	\$76,568	\$98,412	\$69,898	\$90,535
Funds through District	\$19,240	\$121,518	\$4,040	\$46,467	\$19,392	\$19,464	\$10,438	\$22,215
Funds through Grants (Title 1A/1D)	\$0	\$0	\$324,207	\$0	\$500	\$259,159	\$152,858	\$172,149
Funds through Foundation	\$34,417	\$20,120	\$6,919	\$38,153	\$44,157	\$8,846	\$12,624	\$16,664
TOTAL average funds received	\$138,123	\$241,646	\$444,091	\$179,992	\$140,617	\$385,881	\$245,818	\$301,563
Student Total (average from 2012-2016/17)	383.6	352.8	414.8	414	338.20	368.2	309	358.6
	Adams (1)	Franklin K-8 (2)	Garfield (3)	Hoover (5)	Jefferson (4)	Lincoln (6)	Mt. View (7)	Wilson (8)
Funding per student (including Title funds)	\$360	\$685	\$1,071	\$435	\$416	\$1,048	\$796	\$841
Funding per student (excluding Title funds)	\$360	\$685	\$289	\$435	\$414	\$344	\$301	\$361

Staffing Summary (2017/18)	Adams (1)	Franklin K-5 (2)	Garfield (3)	Hoover (5)	Jefferson (4)	Lincoln (6)	Mt. View (7)	Wilson (8)
Teacher FTE Allocation (2017-18)	17.00	6.00	19.00	16.00	13.00	15.00	13.00	16.00
Grades K-6 Enrichment FTE Allocation (17/18)	2.00	0.80	2.30	2.00	1.80	1.80	1.80	2.00
Basic school support FTE Allocation (17/18)	8.90	4.03	10.00	8.19	8.06	9.87	8.06	8.19
Student Total 2017/18 Projected	434.00	170.00	455.00	424.00	343.00	362.00	336.00	410.00
	Adams (1)	Franklin K-5 (2)	Garfield (3)	Hoover (5)	Jefferson (4)	Lincoln (6)	Mt. View (7)	Wilson (8)
Students per Teacher FTE	25.53	28.33	23.95	26.50	26.38	24.13	25.85	25.63
Grades K-6 Enrichment students per FTE	217.00	212.50	197.83	212.00	190.56	201.11	186.67	205.00
Basic school support students per FTE	48.76	42.18	45.50	51.77	42.56	36.68	41.69	50.06
Total adults per student	15.56	15.70	14.54	16.19	15.00	13.57	14.70	15.65



Corvallis School District Secondary School Comparison Data - Funding and Staffing

2012-2016 average funds received

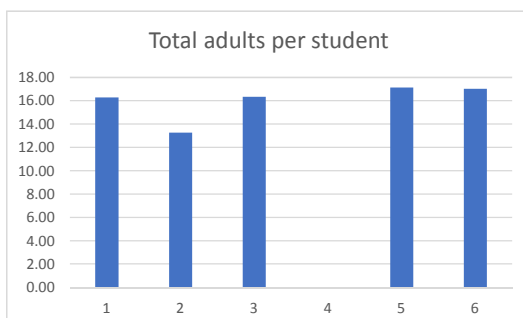
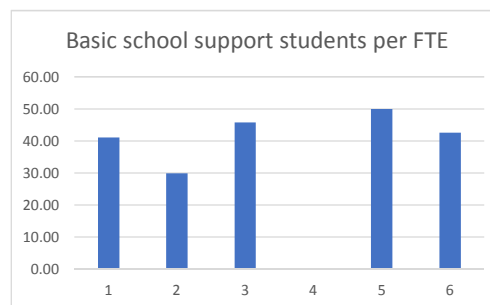
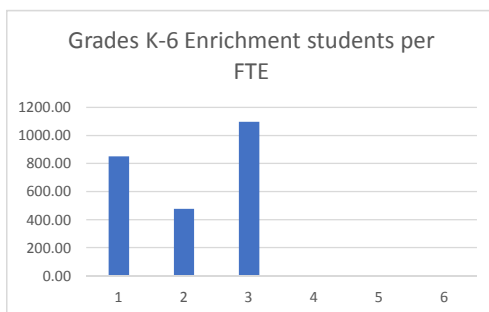
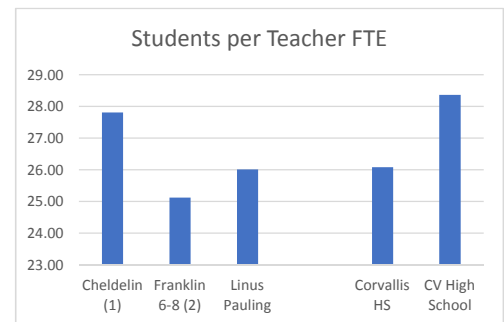
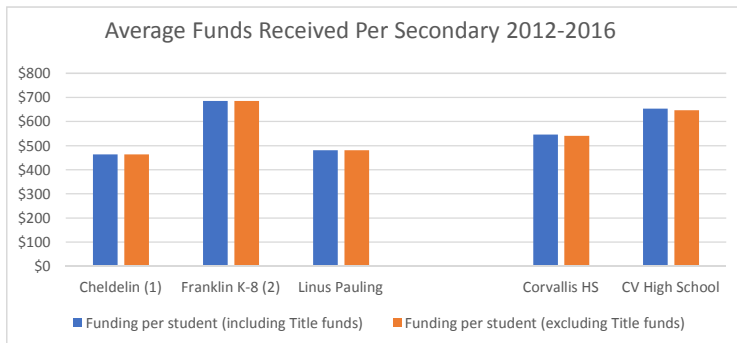
	Cheldelin (1)	Franklin K-8 (2)	Linus Pauling
Principal's Discretionary	\$236,407	\$100,008	\$301,420
Funds through District	\$6,704	\$121,518	\$3,641
Funds through Grants (Title 1A/1D)	\$0	\$0	\$0
Funds through Foundation	\$12,506	\$20,120	\$34,977
TOTAL average funds received	\$255,617	\$241,646	\$340,038
Student Total (average from 2012-2016/17)	551.8	352.8	706
	Cheldelin (1)	Franklin K-8 (2)	Linus Pauling
Funding per student (including Title funds)	\$463	\$685	\$482
Funding per student (excluding Title funds)	\$463	\$685	\$482

Corvallis HS	CV High School
\$557,868	\$459,803
\$75,875	\$115,707
\$6,308	\$5,918
\$52,234	\$78,033
\$692,285	\$659,461
1267.8	1,009.60
Corvallis HS	CV High School
\$546	\$653
\$541	\$647

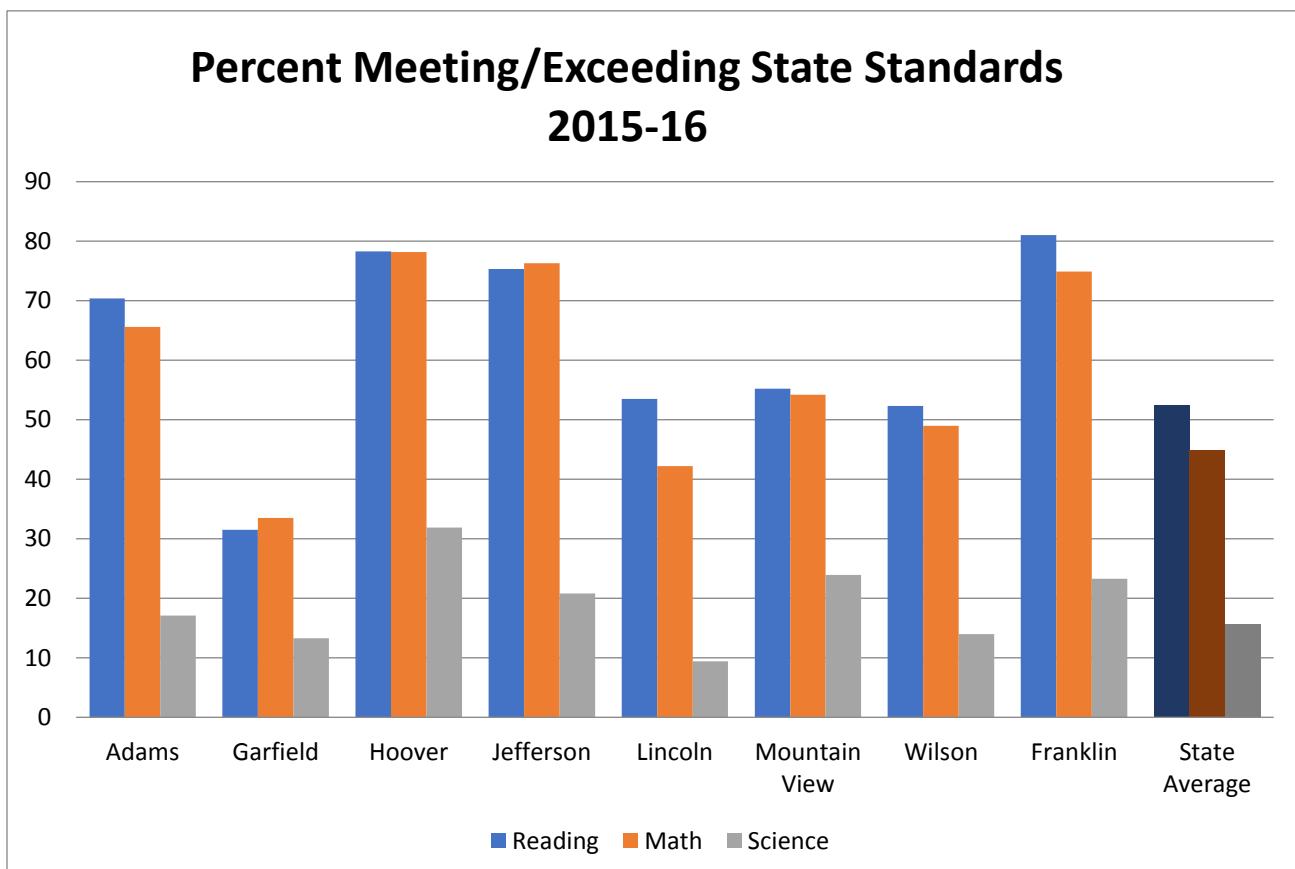
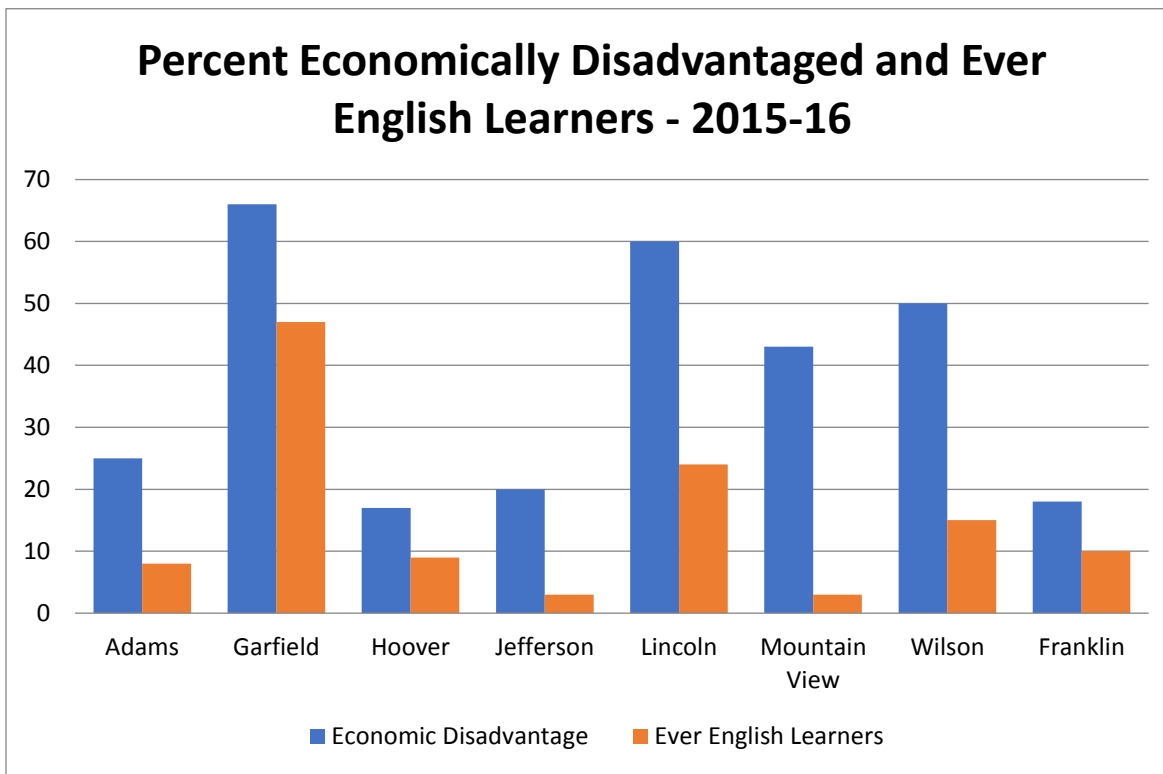
Staffing Summary (2017/18)

	Cheldelin (1)	Franklin 6-8 (2)	Linus Pauling
Teacher FTE Allocation (2017-18)	20.17	6.45	27.83
Grades K-6 Enrichment FTE Allocation (17/18)	0.66	0.34	0.66
Basic school support FTE Allocation (17/18)	13.65	5.42	15.83
Student Total 2017/18 Projected	561.00	162.00	724.00
	Cheldelin (1)	Franklin 6-8 (2)	Linus Pauling
Students per Teacher FTE	27.81	25.12	26.02
Grades K-6 Enrichment students per FTE	850.00	476.47	1096.97
Basic school support students per FTE	41.10	29.89	45.74
Total adults per student	16.27	13.27	16.34

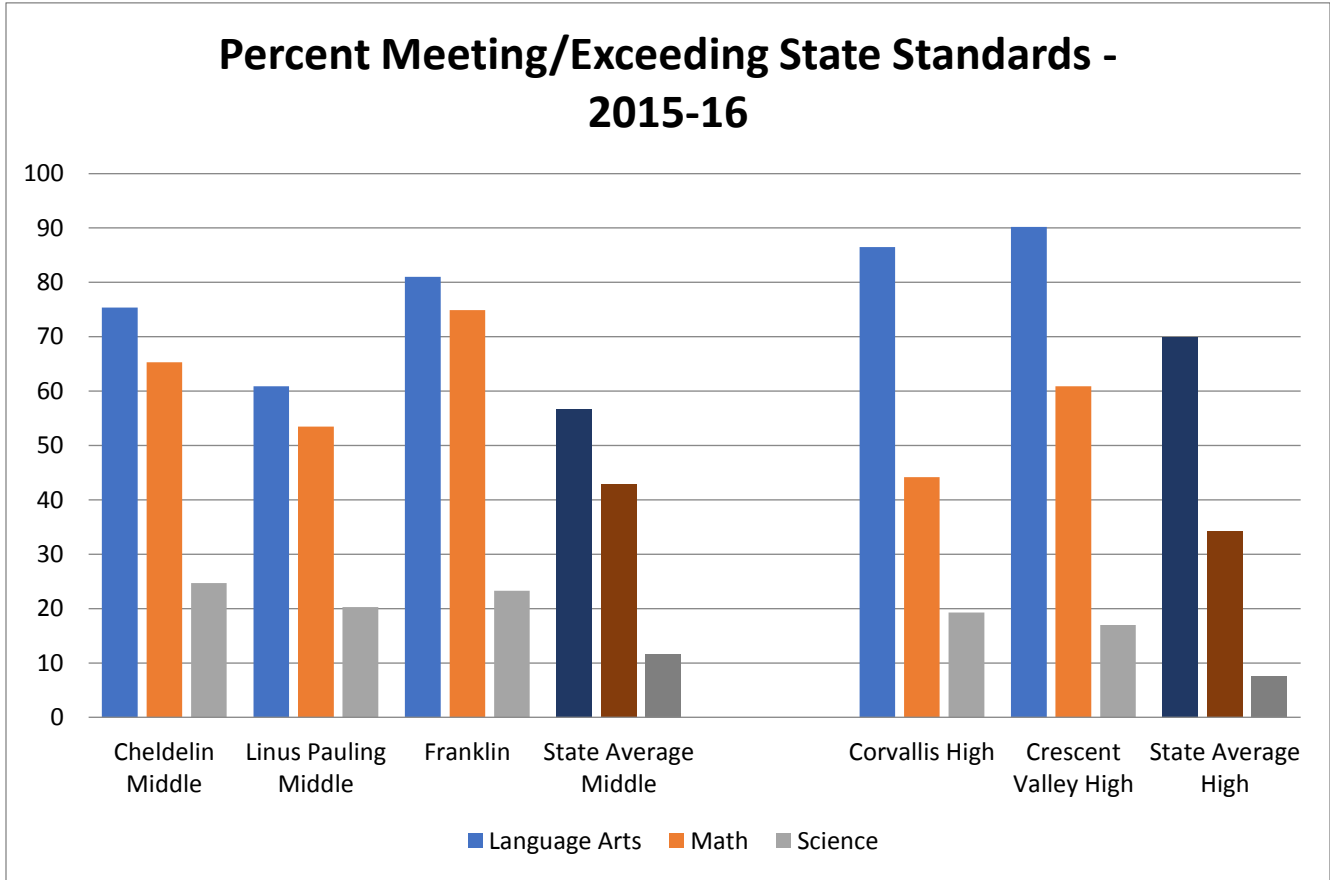
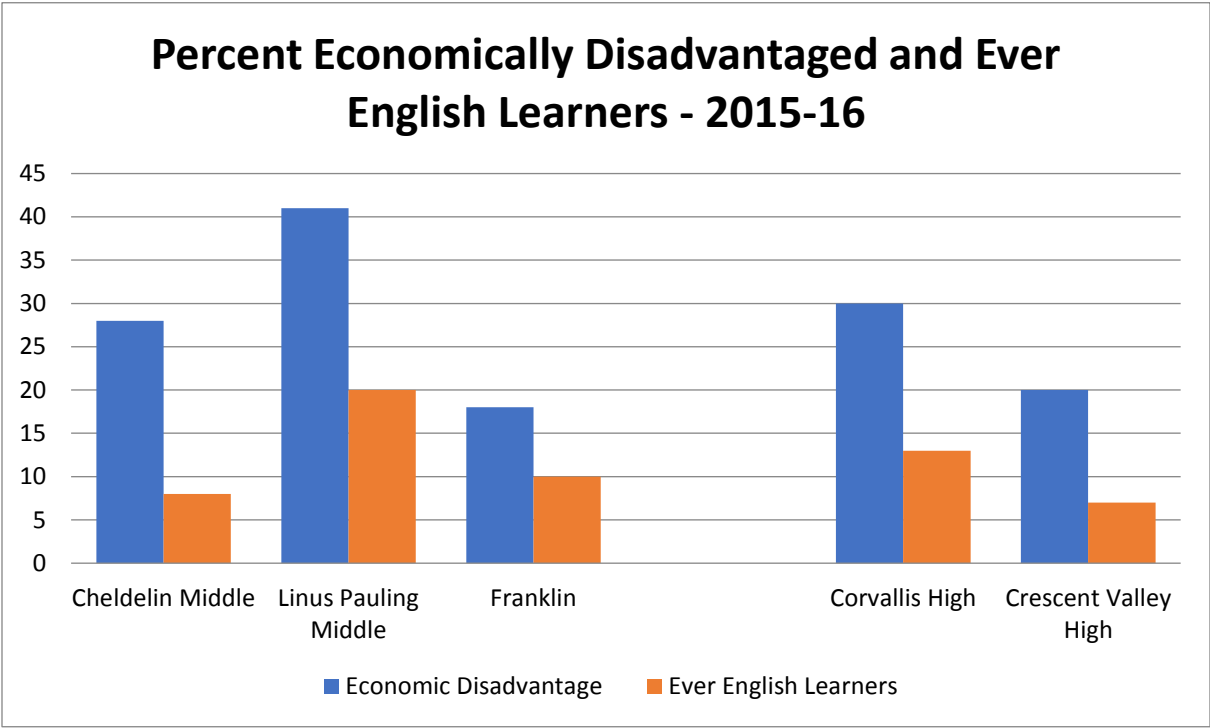
Corvallis HS	CV High School
43.02	33.70
0.00	0.00
22.45	22.45
1122.00	956.00
Corvallis HS	CV High School
26.08	28.37
n/a	n/a
49.98	42.58
17.14	17.03



Corvallis School District Student Demographics and Achievement Data (Smarter
Balanced Assessment) Comparisons – **ELEMENTARY**



Corvallis School District Student Demographics and Achievement Data (Smarter
Balanced Assessment) Comparisons – **SECONDARY**





Corvallis School District Fundraising Task Force

May 31, 2017; 6:30-9:00

Below are Corvallis school principal responses to the following three questions:

- 1. Please briefly describe the fundraising your school has done this year.**
- 2. Do you have any formal or informal guiding principles that shape the fundraising work in your building? If so, what are those?**
- 3. Finally, please briefly describe what this year's fund-raising dollars have been used for, or are intended to be used for.**

School	Fundraising This Year	Guiding Principles Used	Uses for Fundraised Dollars
Adams	The Adams Parents and Teachers (APT) group has done fundraising this school year such as Jog-A-Thon, Direct Donation, and Art Show Auction. Fifth graders have also done some fundraising to raise money for science camp. They have sold clam chowder, poinsettias and hosted a cake walk.	There are not formal guiding principles at this time. An informal principle that has been shaped somewhat by current practice is that fundraised money is spent to benefit all children at the school during the specified academic year to support the goals of the school.	Assemblies, field trips, online subscriptions (Raz Kids, etc.), periodical subscriptions (Time for Kids, etc.), library books, keyboards, headphones, school club support (garden, wellness team), PBIS support (prizes), art class supplies (clay, paint), teacher accounts, author visit
Cheldelin Middle School	In the school year 2016-2017, our main school-wide fundraising activity was a direct donation drive coordinated by our Cheldelin Parent Organization (CPO) that ran for 6 weeks called "Impact Cheldelin." Students collected monetary donations that were deposited into the CPSF account. Students got tickets for participation which gave them entries into drawings for community donated prizes each week. The Cheldelin Parent Organization oversees and budgets these funds. During our 6 week school-wide Impact Cheldelin fundraiser, we raised just short of \$18,000. The allocations this year were: \$2000 per grade level for enrichment activities and field trips, \$300 for assemblies, \$4000 for teacher grants (teachers have to "apply"), \$1500 for entrance and registration fees, \$1000 for positive behavior incentives, \$500 for student supplies, \$1885 for the library, \$1500 for yearbook	Since we do not feel that it is prudent to expect parents to participate in fundraising activities throughout the year, our objective is to host only one large fundraising event per year in which we ask parents for money. Track being an extra-curricular sport is separate and therefore funds accumulated from fees, fundraising or donations are considered separate and are to be used for track equipment, coach payroll and transportation/entrance fees. We agreed to allow the Cheldelin Library to run a Book Drive this year because the drive was focused on the direct purchase and donation of books rather than a request for money.	See Column 2

School	Fundraising This Year	Guiding Principles Used	Uses for Fundraised Dollars
	scholarships, \$1200 for 8th grade party and breakfast, \$1000 for fundraising expenses and \$400 for staff appreciation. The CPO also supplements income by collecting Box Tops, selling eScrip and hosting dine-outs. The cumulative income from these three supplemental projects was \$1450 this year. <i>This event is anticipated to occur again in 2017-2018.</i> In addition to this, the 8th grade class with the direction of a small parent group and two staff members has done a few smaller fundraisers for the Washington DC trip scheduled for this summer which have included: car wash, can/bottle drive and dine-outs. These profits get run through the Cheldelin student body account and then get directly applied to the Close Up Account that is managing the individual student accounts for the trip. <i>This event is NOT anticipated to occur again in 2017-2018.</i> Track does a jog-a-thon in May to allow students participating in track the opportunity to get spirit wear. <i>This event is anticipated to occur again in 2017-2018.</i> In the spring, the teachers host a Penny Wars contest where students compete against one another by collecting coins by advisor class. These funds get allocated to a local agency as a donation. The total for this is usually between \$200-500. The last couple years, funds have been presented to Jackson Street Youth Shelter. <i>This event is anticipated to occur again in 2017-2018.</i> The Cheldelin Library hosted two drives this year. The first was a Scholastic Book Fair in the Winter that allowed us to generate some income to purchase new titles for our collection. The total collected was around \$700 and is earmarked for		

School	Fundraising This Year	Guiding Principles Used	Uses for Fundraised Dollars
	purchasing books. Volunteer parents also helped with a Book Drive in the Spring. The Book Drive allowed parents to purchase titles directly from an Amazon Wish List or donate books directly at the school or at Corvallis Book Bin. The Book Drive collected over 150 useable books for the library collection. <i>This event is anticipated to occur again in 2017-2018.</i>		
Corvallis High School	Will be sending you via email info on fundraising for Athletics. The only other fundraising that happens here is with clubs raising money for charity, or music/band/theatre raising funds for field trips to offset costs. Of course, there's the Mr/Ms Spartan program, as well. (see attached for response re: CHS sports)		
Crescent Valley High	Fundraising is part of daily life at Crescent Valley. Virtually all sports fundraise to offset program costs that are well above the building's activities allocation. The variety of fundraising strategies is impressive: soccer has a golf scramble; the Robotics club held a pancake breakfast last fall, and sold coupons for Davis Family Farms last month; the junior class puts on a dance to raise money to pay for prom; the Mr./Ms. CV pageant fundraises for months (raising \$44,000 this year!) to support three local charitable causes; the Booster Club sells \$50 memberships to raise money to make purchases that enhance CV sports programs; the CV parent organization raises money (not sure how) to pay for classroom grants (over \$5,600 this year to about 20 teachers); the list goes on and on.	I am not aware of any overarching principles that inform fundraising. Nor do I have any evidence that there is any real "coordination" of fundraising that would help keep the number and scope of fundraising initiatives in check, or help avoid "over-asking" the same source(s).	See Column 2 for examples. In general, fundraising is conducted to cover program expenses (some necessary; some discretionary) that exceed the building's allocation. Athletic teams may fundraise for uniforms or to attend a summer team camp. Football, basketball, volleyball and wrestling, as well as CV music programs, charge admission to events
Franklin	PTA has a jog a thon that provides funds to support teacher/student projects, i.e. student rewards, supplies, outdoor garden, landscaping, fun nights/activities, technology support, ropes course/future outdoor school, library books, art/ music support.	PTA goal is to support teacher/student needs.	Funds support teacher/student projects, i.e. student rewards, supplies, outdoor garden, landscaping, fun nights/activities, technology support, ropes course/future outdoor school, library books, art/ music support.
Garfield Elementary	Majority of the fundraising work has been through writing grants. They have an awesome group on	Nothing formal. Grant writing is designed to remain in line with the	Smaller fundraising events have been used to support classroom field trips, and on grants requested by

School	Fundraising This Year	Guiding Principles Used	Uses for Fundraised Dollars
	the PTA that has been doing that. This year they got a \$22K grant through the Gray Family Foundation. That was a big chunk of their fundraising this year. Garfield's PTA is focused on grants for big projects. They also have the Gecko Run and the tamale sale, which raised over \$5K and over \$3K, respectively, this year.	school's mission and vision, and for ways to expand bilingual/bicultural education.	teachers for new projects, such as the second grade teacher who wanted to purchase yoga mats for her class so they could do yoga 15 minutes a day. Leigh's guidance for teachers is that requests to the PTA should be for things above and beyond what they'd been planning and, therefore, hadn't been budgeted (such as the yoga mats). The big grant was around geography and social justice. A big chunk of grants went to expand classroom libraries around the themes of geography and social justice. Another big chunk was for field trips. And yet another big chunk was used for presentations to either the entire school, or to half the school, around geography and social justice. Garfield's PTA is consciously moving away from local events because they took a lot of volunteer time, ex: no carnival this year. Instead, this Friday they'll have a pool party and rent Otter Beach (the City's aquatic center). They will probably have a silent auction. Their fundraising has been about community-building vs. just raising money. The PTA said that spending so much time fundraising was distracting from community-building events; their time is better spent on getting the school community together.
Harding Center	We have not really done any fundraising this year. We have had one event – the Film Festival – where we charged admission to create sustainable funding for future years, but that is all. We do actively seek out grant funds to pay for innovative programs, infrastructure improvements, supplies, materials, and experiences for our students.	Informally, we only ask for funds that will directly impact the continued success of our students through improved academic and interpersonal experiences.	See Column 2.
Hoover	We have three fundraisers that we do each year: Jog-A-Thon in the Fall, Read-A-Thon in the Winter, and Carnival/Auction in the Spring.	We only do “homegrown” fundraisers. We do not work with fundraising companies for percentages. The three fundraisers we do each year have been carefully chosen: • The Jog-A-Thon ties into promoting physical activity	In 2016-2017 (and most previous years) our HPTO's fundraising efforts were geared to funding the art teacher and art program at Hoover. In 2017-2018 our HPTO's fundraising efforts will be geared toward Library, Technology, and Student/Classroom Enrichment.

School	Fundraising This Year	Guiding Principles Used	Uses for Fundraised Dollars
		• The Read-A-Thon ties into promoting literacy • The Carnival/Auction is an annual family tradition bringing families together for an evening of fun	
Jefferson Elementary	Jefferson fundraising is done solely through our PTA (called JPAT). They run three fundraisers each year. • Direct Donation Drive – parents are asked to donate to JPAT directly or through the CPS Foundation – they can do a one-time donation or a monthly draw • Jog-A-Thon – students get family and friends to sponsor them and they run laps • Auction – silent and live auction items sold at an evening event for parents only	It is my fourth year at Jefferson, but my understanding from JPAT and parents is that they focus on the big ticket fundraisers to get away from having students sell things like wrapping paper and/or chocolate bars. JPAT does have agreed upon parameters for how they spend their money. Vision & Values for JPAT Funding Priorities: • Benefit ALL Jefferson students. • Enhance a sense of community and quality of life at Jefferson for teachers, staff, parents and students. • Promote equal access to opportunity for all Jefferson students. • Fund programs that provide enhancements and enrichment beyond core academic subjects. • JPAT does not fund staff time for core academic subjects. Spending Priorities: • Art	JPAT fundraises in the current year to pay for things in the upcoming year. This year JPAT raised nearly \$44,000 and just voted to spend it in the following ways in 2017-18: • \$2000 is used for PTA “Community Builders” like carnival, potluck, sock hop • \$1000 is kept in contingency • \$15,000 will be donated to the building to pay for things like art supplies, scholarships for students to go to camp, supplies for our student navigating poverty, garden maintenance, playground equipment, library books, general building supplies, and teacher/classroom discretionary accounts • \$23,000 will be donated to pay for 2 additional library hours per day, a Band Director, a 5th Grade Musical Director and supplies for the musical, a fund for school assemblies, and a fund to pay staff to do extracurricular clubs.

School	Fundraising This Year	Guiding Principles Used	Uses for Fundraised Dollars
		• Music • Additional Staffing – non-academic • Supplementary Academic Activities • Physical Plant Improvement	
Lincoln	5k/10k run in the spring Wreath sale for 5 th grade outdoor school Tamale sale for 5 th grade outdoor school Jogathon (PTA) Scholastic Book Fair (PTA) Carnival (PTA) Spring Fling Dance (toy drive/outdoor school) Ongoing—monthly dine-outs (PTA) Ongoing—Amazon, Target, Fred Meyers linking cards to school PTA Ongoing—Box tops	Informal guidelines--PTA fundraising efforts are geared towards enrichment. Funding request process by staff to the PTA is formal. Staff complete a request form and then submit to office for approval prior to sending it to the PTA to ensure other funds are unavailable. Lincoln PTA follows State and National PTA guidelines for allowable funding	Examples of funded projects this year include: bilingual music assembly • 123Andres, • Reptile assembly, • alternative seating, • field trips to OMSI, • Science Factory, • local author presentation • Art supplies • State Honors' choir, including teacher Oregon Music Educators' Association fee • 5th grade outdoor school fully funded.
Linus Pauling Middle School	We have one official schoolwide fundraiser called "Make Your Mark" This year and in the future there will be three parts to the fundraiser: A schoolwide jog-a-thon, a letter sent out to parents asking for straight donations, and a "Penny War" activity with students. Next year, we will start doing the fundraiser in the fall instead of the winter in order to use the money on the same students and families that support the fundraising.	-Only one fundraiser a year. -We will put a cap on the amount of money we raise. \$10,000 seems to be enough right now. May change in the future -Money to be used in the same year it is raised. -Money is to be used on student enrichment: classroom projects, special programs, field trips etc	Mock Congress, Mary's Peak field trip, classroom projects, athletic equipment for PE classes, Greek Olympics,
Mt. View Elementary	The PTA does all of the following: • Silent Auction • SCRIP	No written guiding principles though I dissuade anyone from selling candy.	Each certified teacher receives a stipend from the PTA to be used for their classrooms. Some use it for books or classroom supplies or even field trips so we don't have

School	Fundraising This Year	Guiding Principles Used	Uses for Fundraised Dollars
	• Holiday Wreaths • Box Tops • Movie night (for childcare and food only – movie and popcorn are free) • Jog-a-thon • Dine-outs		to charge anyone. The PTA has made generous donations to the Mt. View library. They have given larger stipends to the Music, Art and PE programs. They fund our Naturalist in Residence. They contribute to the garden fund.
Wilson Elementary	Fall campaign to support ART called AWE (Artists of Wilson Elementary)... This is only a direct donation drive. We have not involved students in this. With the levy funds for art FTE, we may eliminate this fundraiser, although supplies such as clay are expensive. Spring Fun Run... this is the primary funding source for our PTA programs that enhance our school. We do a low key fundraiser called “Jump Rope for Heart” which is led by our PE teacher to support the American Heart Association, so these funds don’t stay at our school, but are a philanthropy opportunity for our children. Our talent show which we call “variety night” includes some baked items and art, which pays for the rental of CVHS where we host the talent show.	It’s more informal, but definitely part of our guiding vision. We are sensitive to not require participation as a title school. We have the highest population of students navigating homelessness/inadequate housing, so it is critical that the children of these families and those qualifying for free and reduced not feel excluded. For example, our school carnival does not cost. If we have prizes for the Fun Run, we avoid having them be passes to museums, etc. that the family may not be able to get them too.	Community building events (Dance of the Decades, Carnival, Variety Night, Craft Fair) Periodicals for classrooms such as Time for Kids Food Adventures in the classroom (aligned with wellness goals) Art supplies (purchased a cart for our teacher) We added a swing set to our playground (we didn’t have swings on our intermediate playground).

School District Policy Internet Review by Scott Perry - April, 2017

Policies of Schools Determined "similar" to Corvallis 509J by reason of student diversity, socioeconomic factors, etc.

District	Specifically Encourages Fund-Raising?	Any Limits beyond principal approval?	Addresses FTE via Fund-Raising?	Any Kind of Equity Provision?
Greater Albany	Yes	Superintendent approval also required if fund-raising is district-wide. If anticipate collecting over \$10,000 must complete application and be approved by superintendent. Board approval required if over \$75,000.	No	Policy calls for development of guidelines for accepting gifts that "include a concern for fairness and equity among schools" but guidelines not yet developed.
Newberg	Yes	Approval must be granted by superintendent or designee. All school-wide fundraisers shall be scheduled by June 15 of the prior school year in order to provided sufficient opportunity for coordination among the district's schools and programs. Superintendent shall maintain a log of fund-raising activities, their purpose and frequency and provide reports as requested.	No	None noted.
Bend-LaPine	Yes	Both principal and superintendent approval required for student fund-raising. Not for community fund-raising. Receipt of gifts requires principal OK. No door-to-door	No	None noted.
North Clackamas	Yes	No limits - general guidelines (minimize disruption, approval from principal, etc.)	No	None noted.
Cascade	Yes	Four weeks before the scheduled fund raising, all groups planning an event requiring fund raising for all or partial support shall submit to the principal or vice principal an event and fund raising plan.		None noted.

Mollala River	Yes	No limits - general guidelines (minimize disruption, approval from principal, etc.)	No	None noted.
Oregon Trail	Yes	Fundraising requests must be submitted on forms developed by the district. This document will include the reason for requested fundraiser, anticipated revenues, anticipated expenditures, length of the project, and a distribution formula in the event more than one organization is involved. A distribution formula will be stated on the request for fundraising document and will be signed by all parties concerned	No	In accepting gifts, the district will be aware of the requirement that there should not be significant differences among the various school facilities. To the extent practicable, districts will ensure equality among its schools and if questions of equality arise will contact the districts' attorney for guidance.
Gladstone		Policies not available on Web		
Oregon City	Yes	Each fundraising activity must have the prior approval of the principal. In addition, secondary school fundraising activities must have the approval of the fundraising council and be placed on the yearly schedule of fundraising activities. The Board recognizes that some programs cut through budget reductions, are highly popular and that individuals, groups, or organizations will want to raise funds to reinstate them. Individuals, groups, or organizations wishing to reinstate such programs must inform the district of their intent to do so in a timely manner and must follow all regulations as set forth in this policy.	Yes - if program is being reinstated	None noted.
Silver Falls	Yes	Application form required to obtain principal approval of fund-raising activity.	No	None noted.

Non Profit News For Nonprofit Organizations | Nonprofit Quarterly
[fundraising-bring-equality-to-public-school-education/](https://nonprofitquarterly.org/2016/02/03/can-parental-fundraising-bring-equality-to-public-school-education/)

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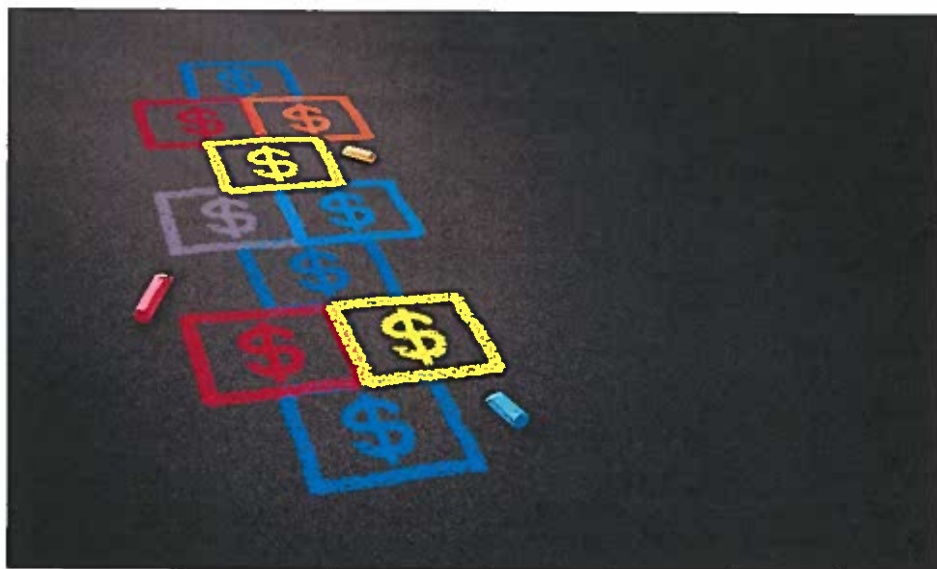
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Can Parental Fundraising Bring Equality to Public School Education?

By  MARTIN LEVINE | February 3, 2016

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(<https://nonprofitquarterly.org/wp-content/blogs.dir/56/files/2016/02/School-money.jpg>)

January 28, 2016; The Atlantic (<http://www.theatlantic.com/education/archive/2016/01/rich-parents-school-inequality/431640/>)

Schools want the parents of their students to be deeply engaged in the educational process. But can the parent-school partnership go too far? Laura McKenna, writing recently in the Atlantic (<http://www.theatlantic.com/education/archive/2016/01/rich-parents-school-inequality/431640/>), looked at the dramatic growth of parent fundraising and asked, "Is all this work from parent-school groups—work that is done with the best of intentions—unfairly increasing advantages in already privileged communities?" It's a question that speaks to the heart of a larger conversation about public education and educational equity.

Earlier this year, Beth Gazley at Indiana University wrote in our print quarterly (<https://nonprofitquarterly.org/2015/03/27/how-philanthropy-props-up-public-services-and-why-we-should-care/>) about the growing trend of public services relying on philanthropic support and described the significant growth in public school fundraising based on her ongoing research. Total school-focused philanthropy had already reached more than three-quarters of a billion dollars by 2010. She cautioned,

Most of the philanthropy directed at public schools is local, meaning that wealthy school districts enjoy a philanthropic advantage and few people are paying attention to fairness and balance. And, indeed, we found clear evidence that across the nation private philanthropy for public schools exacerbates rather than eliminates budgetary inequities across school districts. Specifically, although most school funding still comes from taxpayers, we found that wealthy school districts are able to provide more dollars per pupil overall through this philanthropic "bonus."

The Atlantic article cited the work of Rob Reich, associate professor of political science at Stanford and co-director of the Center on Philanthropy and Civil Society, who sees this same negative impact of parents raising funds for their children's schools. In a 2013 *New York Times* op-ed (http://www.nytimes.com/2013/09/05/opinion/not-very-giving.html?_r=1), he wrote:

Wanting to support your own children's education is understandable, but it also has unintended, pernicious effects...When donors give to their own child's school or district, they are making a charitable contribution that the federal government treats in the same way as a donation to a food bank or disaster relief. But charity like this is not relief for the poor. It is, in fact, the opposite. Private giving to public schools widens the gap between rich and poor. It exacerbates inequalities in financing. It is philanthropy in the service of conferring advantage on the already well-off. By lowering the taxes of the donor and diminishing the tax revenues that would otherwise have been collected and partly distributed to rich and poor schools alike, federal and state governments are in effect subsidizing the charitable activity of parents who donate to their child's school. In this respect, the policies that govern private giving to public schools seem perverse. Tax policy makes federal and state governments complicit in the deepening of existing inequalities that they are ostensibly responsible for diminishing in the first place.

On the other side of the issue is Jay P. Greene, professor of education and political science at the University of Arkansas, who calls the money collected by parents insignificant relative to the total amount spent every year on public schools.

Charitable sources from the Gates Foundation to the local parent-teacher organization contribute an estimated \$2 billion total to public schools annually. When compared to the \$600 billion the country spent on K-12 education during the 2013 fiscal year, he noted, the total spending from philanthropy is "buckets into the sea."

"The millions that the PTAs and foundations raise every years seems like a lot of money," Greene said, "but in truth, it's a rounding error."

The absolute amount raised by parents is not large enough to make the difference between "rich" and "poor" schools, but they do exacerbate a growing incidence of imbalance in opportunity. At some elite high schools around the country, parents raise hundreds of thousands or even millions to support guest lecturers, science equipment and scholarships. And beyond what the money can buy, this focus on "my school" contributes to a very narrow

- view of community and the responsibilities of citizens to the common good. In a time when public funding for schools has decreased, a reliance on school-based philanthropy will become increasingly troublesome if equity is our objective.

McKenna suggests that “rather than restricting affluent parents from contributing to their public schools or shaming them for their efforts, perhaps they could be encouraged to think about public education beyond their town boundaries—partnering with schools in less affluent areas and forging a fellowship over time. In better understanding that public education extends beyond the five-mile radius of their communities, parents might be willing to share a portion of their considerable resources and social capital to benefit other kids.” That is the change. Are we up to it?—Martin Levine

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Five Ways to Encourage Giving to Disadvantaged Public Schools



Parent donations can widen inequities between public schools. What can we do to motivate affluent parents to charitably support all schools, not just their own?

BY JEREMY ADAM SMITH | FEBRUARY 6, 2014

As governments have slashed funding for public education, more and more school districts have turned to parents for help—and parents have responded to the call.

Case in point: In San Francisco, PTA budgets have increased by 800 percent over the past 10 years, according to an investigation I conducted with colleagues at the *San Francisco Public Press*.



A child buys tickets at the Halloween-Día de los Muertos fundraiser for Junipero Serra Elementary in San Francisco.

© Tearsa Joy Hammock / San Francisco Public

(Note: Parts of this essay are adapted from the *Public Press* article, “How Budget Cuts and PTA Fundraising Undermined Equity in San Francisco Public Schools.”)

It’s hard to fault parents for giving and raising money for their children’s schools. Their efforts build community, and they make struggling urban public schools more attractive to families who have the means to flee to private or suburban schools, if they want to.

But our investigation revealed an unintended effect of their heroic efforts: Reliance on parent donations has widened inequities between rich and poor in San Francisco public schools.

John Gottman: Trust and Inequality



The Santa Monica-Malibu school district embraced both solutions in 2011. Today the district's education foundation is the only way parents can donate money to support teachers and staff.

But the reform faced stiff resistance from parents. Affluent Malibu residents tried to break off from more working-class Santa Monica to create a separate school district. At least one Malibu school refused to share. And overall, the district's PTAs are struggling to raise as much as in previous years.

Almost every San Francisco parent and educator I interviewed rejected the idea of pooling PTA funds and then redistributing them to the neediest schools. "I think you'd get a lot of parents pulling their kids out of public schools and putting them in private schools," said one parent. "I'd pull my kids."

This seems to lend support to the idea that humans are selfish by nature: Parents will support the school their own child attends, but might not be willing to support schools whose children look different from theirs. This tendency may also fuel anti-tax sentiment.

1. Redefine the in-group to include out-groups



A Central American indigenous dance troupe from UC Berkeley, leads a “friendship dance” at Junipero Serra’s annual Halloween-Día de los Muertos celebration. Most of Junipero Serra’s students are immigrants or the children of immigrants, mainly from Latin America. So all gatherings are conducted in both Spanish and English, and parents in both groups make a conscious effort to build community across cultural and linguistic barriers, Principal Evelyn Cheung said. “These are not isolated groupings. They work together and they’ve built trust.”

© Tearsa Joy Hammock / Public Press

When school leaders foster an ethic of “every school for itself”—by, for example, asking parents to raise money for their own academic programs—they drive wedges between the schools. This dynamic becomes much worse if the school district is heavily segregated across lines of class, race, and citizenship status, as is the case in San Francisco or in Santa Monica-Malibu.

What’s the solution? The trick, says Fiske and other psychologists, is to redefine the in-group so that it includes people with many differences.

Her research finds that the warmth we feel toward and from other groups “is completely predicted by cooperative or competitive intent.” For example,

framing immigrant children as taking resources away from the native-born fosters a competitive mindset. But if education leaders present immigration as an essential part of American identity and describe programs like English-language instruction as an investment in the future, then giving might feel better.

Psychologists who study out-group prejudice say that two elements are especially crucial: leadership and contact between people.

“You can hold events that facilitate contact, even at a superficial level, like around food,” says GGSC director and UC Berkeley psychologist Rodolfo Mendoza-Denton, an expert on intergroup relationships. “And another hugely important thing is to have a strong statement from the administration—in other words, the views and messages from authorities really matter. Because difficult intergroup situations are ambiguous, and in ambiguous situations people look to leaders to

town with a specific need and donate directly to that classroom.” Making it specific and personal can help education leaders expand the in-group to include many groups of people, by building a sense of outsiders’ humanity.

3. Make it seem easy—and effective

University of Iowa social psychologist Daryl Cameron studies how to expand circles of empathy and compassion. “If people think that extending money to less affluent schools would be especially financially costly, emotionally tiresome, or unlikely to make a difference, then they may curb their compassion and disengage from the problem,” he says.

Cameron’s research says that compassion and empathy come naturally—but people may cognitively switch them off if they fear that their help will be useless. To encourage giving across school districts, parents and other prospective donors need to know their money will make a difference.

“Research suggests that showing people the benefits of their prosocial actions—in other words, showing that their efforts are not a drop in the bucket in relation to large-scale infrastructural problems—will make them more like to consistently help,” says Cameron.

This places a burden on needy schools and on school districts to show the difference a donation can make, and to demonstrate progress. But the results may be worth the extra effort. As Cameron says, “Changing people’s expectations about what compassion will be like—warm and rewarding, as opposed to intense and exhausting—may be one way to motivate change, especially when extreme out-group populations are involved.”

When people watch Ben's story in the lab—and they both maintain attention to the story and release oxytocin—nearly all of these individuals donate a portion of their earnings from the experiment. They do this even though they don't have to. This is surprising since this payment is to compensate them for an hour of their time and two needle sticks in their arms to obtain blood from which we measure chemical changes that come from their brains.

Note once again how this item, telling a good story, supports the other items on this list. Good stories help us to imagine what will work and what doesn't; they are built on detail and specificity; and, most crucially, they can expand our sense of who belongs in our group.

Empathy, Neurochemistry, and the Dramatic Arc: Paul Zak at the ...



5. Make it voluntary

ask *in a way that highlights moral choice*. “Even subtle changes in the nature of a request can make all the difference,” they write.

In one study, a graduate student requested a bit of help and ended her plea by saying either, “It’s entirely your choice whether to help or not” or “I really think you should help out.” In both cases, the personal plea was highly effective. More than 97 percent of people agreed to help. Importantly, though, helpers felt happier if they had been reminded that helping was their choice rather than being told they should help.

These are lessons being applied by the Santa Monica-Malibu school district since centralizing its fundraising activities. Its education foundation launched a \$4 million campaign last spring, and by the late fall of 2013, it had raised \$2.4 million.

“Some of our wealthiest Santa Monica schools have the greatest participation,” Superintendent Sandra Lyon told me. “Indeed, across Santa Monica schools, some of the loudest opponents have become the biggest champions and are leading the charges at their schools.”

Lyon has seen a culture change in a district heavily divided by social class. “Schools are collaborating in ways they had not done before,” she said. “The inequity in schools had bothered many for years, and so there has been support for the notion that we are working to create a better education for all students.”

This is true in other districts that have moved to centralize parent fundraising and target needier schools with donations, like the Northern California city of Albany. Elementary school PTA vice president Kim Trutane said that the district-wide fundraising campaign has actually increased their capacity, contrary to her initial fears. “It’s led to more collaborative projects between the PTAs, and I think people just have a good feeling about making contributions that are split evenly among



Center for American Progress



EDUCATION

Hidden Money

The Outsized Role of Parent Contributions in School Finance

By [Catherine Brown](#), [Scott Sargrad](#), and Meg Benner Posted on April 8, 2017, 12:46 pm



AP/Elise Amendola

A mother and son walk toward the entrance of Martin Luther King Jr. Elementary School in Hartford, Connecticut, on February 23, 2017.

KEY POINTS

Select a Chapter ▼

- 🐦 PTAs fund programs, services, and staff for affluent students. High-poverty schools must spend limited public dollars—or go without.
- 🐦 Districts can take policy actions such as pooling a portion of parent donations or regulating their use to benefit higher-poverty schools.

OVERVIEW ▼

PRESS CONTACT ▼

This report contains updates.

Introduction and summary

In 2014, parents of students at Horace Mann Elementary School in Northwest Washington, D.C., spent over \$470,000 of their own money to support the school's programs.¹ With just under 290 students enrolled for the 2013-14 school year, this means that, in addition to public funding, Horace Mann spent about an extra \$1,600 for each student.² Those dollars—equivalent to 9 percent of the District of Columbia's average per-pupil spending³—paid for new art and music teachers and classroom aides to allow for small group instruction.⁴ During the same school year, the parent-teacher association, or PTA, raised another \$100,000 in parent donations and collected over \$200,000 in membership dues, which it used for similar initiatives in future years.⁵ Not surprisingly, Horace Mann is one of the most affluent schools in the city, with only 6 percent of students coming from low-income families.⁶

Horace Mann is not unique. Throughout Washington, D.C., and around the country, parents are raising hundreds of thousands—even millions—of dollars to provide additional programs, services, and staff to some of their districts' least needy schools.⁷ They are investing more money than ever before: A recent study showed that, nationally, PTAs' revenues have almost tripled since the mid-1990s, reaching over \$425 million in 2010.⁸

PTAs provide a small but growing slice of the funding for the nation's public education system. While the millions of dollars parents raise is

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students.⁹

This situation risks deepening school funding disparities, which already exacerbate inequities. In many states, state and local funds allocate more money to affluent districts and schools than neighboring districts and schools that have higher rates of poverty. According to a U.S. Department of Education report based on 2008-09 data, 40 percent of schools that received Title I money received significantly less state and local money than non-Title I schools.¹⁰ Twenty-three states spent more on affluent districts than high-poverty districts. In Pennsylvania, for example, the districts with the highest levels of poverty received 33 percent less state and local funding for education than affluent districts.¹¹

Federal funding goes a long way to compensate for these discrepancies. When considering federal, state, and local spending, nationwide, the highest-poverty districts spend about the same amount—only 2 percent less—per student as the most affluent districts.¹² In the majority of states, per-pupil spending in high-poverty districts is about equal or more than per-pupil spending in affluent districts.¹³

These numbers, however, do not illustrate the full picture of funding discrepancies. Average district per-pupil spending does not always capture staffing and funding inequities.¹⁴ Many districts do not consider actual teacher salaries when budgeting for and reporting each school's expenditures, and the highest-poverty schools are often staffed by less-experienced teachers who typically earn lower salaries.¹⁵ Because educator salaries are, by far, schools' largest budget item, schools serving the poorest children end up spending much less on what matters most for their students' learning.

It is also important to note that even in states and districts where high-need schools are equitably funded, equal funding will not necessarily drive equitable opportunities. A growing body of rigorous research indicates that increased education spending makes a significant impact for low-income students because they need schools to deliver much more support in order to compete on a level playing field with their more affluent peers. Disadvantaged students generally grow up in less verbal home environments, often with less access to enrichment activities.¹⁶ They enter formal schooling academically behind their more affluent peers. To even attain equal footing, therefore, they need additional support. Recent research out of the National Bureau of Economic Research, or NBER, found that investing additional resources in education for low-income students yielded

per-pupil spending increased student test scores by one standard deviation, which is twice the effect of reducing class size through the Project STAR experiment.¹⁸ The Project STAR experiment reduced elementary school class sizes by an average of 35 percent.¹⁹

Parent donations only further the current funding inequities at the district and school levels. What's more, because districts and schools do not readily report the use of private contributions, the dollars are not included as part of national, state, district, and school funding comparisons. When private dollars are taken into account, it is evident that the education finance system benefits the affluent—it does not, in Horace Mann's own words, serve as "the great equalizer."²⁰

In short, wealthy parents are raising large sums of money to improve their already-advantaged schools. In addition to having more experienced teachers, for example, higher-income students are more likely to attend schools with higher-quality facilities.²¹ And schools with robust and well-funded PTAs spend thousands of dollars per student to provide even better programming, including field trips, new computers, art and music instructors, and new supplies for teachers. In less affluent schools without parent donations, funding for these programs or resources likely comes out of schools' overall budgets, requiring administrators to pull funding from other core activities for enrichment opportunities.

Choosing among beneficial resources is especially difficult in states and districts with particularly low per-pupil spending averages. The national average per-pupil spending on public elementary and secondary education is \$10,700; however, per-pupil spending varies dramatically across states.²² New York state spends an average of \$19,800 on each student, and Massachusetts spends an average of \$14,500. On the other hand, California spends an average of \$9,200 per student, while Florida spends \$8,400.²³ The differences among these figures has a real impact on the options available to district and school administrators. Because of this, parent donations can have a greater influence in states or districts with low per-pupil spending, with every \$1 equal to a greater proportion of overall spending. In these regions, parents can supplement public spending to minimize the tough budgeting decisions that will affect student learning.

To better understand the landscape of parent fundraising and what it means for disadvantaged students in particular, the Center for American Progress combined and analyzed several sources of data. First, we analyzed Internal Revenue Service, or IRS, filings and datasets on district revenues and expenditures to explore the scope of PTA fundraising in the country and how PTAs spend their

parent fundraising and school funding equity. Specifically, we found that:

1. In fiscal year 2013-14, the nation's 50 richest PTAs raised and spent \$43 million dollars for the nation's most affluent schools.
2. These parent funds provide programs, services, and staff to affluent students; schools serving low-income students must spend public dollars to obtain these resources, if they can afford them at all.
3. Districts can take policy actions—such as pooling a portion of parent donations or regulating the use of those donations—to benefit higher-poverty schools without substantially reducing overall parent contributions.

CAP believes that district leaders must take action to address funding disparities and ensure that the nation's low-income students, who are disproportionately children of color, have access to all the resources they need to succeed. Action is needed at the state and district levels.²⁴ State leaders should promote greater transparency of private contributions, and district leaders should create systems to allocate all resources equitably. To do this, district leaders should:

1. Annually assess the needs of every school in order to equitably allocate funding to schools
2. Support partnerships between schools across the socioeconomic spectrum
3. Select and implement an approach to tackle the inequities of parent donations by conducting an analysis of the impact these donations have on districts, as well as an assessment of the political will to redistribute funding within the community. These approaches include:
 1. Creating equity funds to redistribute donations to schools with the greatest need
 2. Imposing restrictions on districts' usage of donations
 3. Incorporating predicted parent donations into school budgets
 4. Encouraging donations that promote district-wide benefits

While implementing these policies can cause political pushback and be challenging to implement, addressing private donations is essential to achieving resource equity.

In 2013-14, the 50 richest PTAs raised nearly \$43 million around 10 percent of the estimated total \$425 million raised by all PTAs in the country.²⁵ On average, these PTAs raise around \$851,000 per year, and the top 13 PTAs each raised and spent over \$1 million in one year. For example, Robert S. Hyer Elementary School's PTA in Dallas' Highland Park Independent School District collected over \$1.4 million, or \$1,990 per student, and Highland Park High School's PTA raised over \$2 million—\$950 per student.

By and large, the nation's wealthiest PTAs are found in high-income school districts or in high-income schools within lower-income districts. CAP identified affluent PTAs in Beverly Hills and New York City, as well as in high-poverty districts such as Oakland, California, where three-fourths of students are low-income. (see Appendix Table 1 for a complete list of these PTAs and the 23 districts in which they are located)

These PTAs predominantly support schools with very low levels of poverty. The national average of students who qualify for free or reduced-price lunch—the best indicator of socioeconomic status—is 50 percent;²⁶ almost all these schools served school populations in which less than one-third of students were eligible for free or reduced-price lunches. Over 70 percent had fewer than 1 in 10 students who were from low-income families.

In New York City, for example, the Lillie D. Blake Elementary School served 752 students—only 6 percent of whom are low-income—and in FY 2013-14, its PTA raised \$945,000, or \$1,260 per student.²⁷ At Winn Brook School in Belmont, Massachusetts, where only 1 percent of students are low-income, the PTA raised \$750,000 in that same period, or \$1,680 per student. There were some exceptions. Brooklyn's P.S. 261 served a student population in which 42 percent of students were low-income in the 2013-14 school year, and the PTA raised \$723,000, or \$900 per student.

This is the norm across the country. Well-funded PTAs are much more likely to exist in more affluent districts. In one study by Indiana University Bloomington, researchers Ashlyn Aiko Nelson and Beth Gazley found that PTAs raised over \$300 million more in 2010 than they in 1995.²⁸ The researchers analyzed IRS data to examine PTA fundraising across whole districts over that time period, rather than individual schools. According to their research, districts that were already

Despite the disproportionate concentration of PTA donations in affluent schools, we found that few of the districts with the 50 richest PTAs have policies in place to respond to outsized donations to the wealthiest schools.³⁰ A couple of districts place restrictions on how parent-raised funds can be spent, such as banning their use to pay for school staff. For example, the Rockwall Independent School District in Texas allows PTAs to donate nonpersonnel items to schools, such as equipment, but not to support staff salaries.³¹ Beyond this, however, parent donations in these districts are largely unregulated. See Appendix Table 2 for the full list of districts this report considered.

In some of the nation's most affluent schools, PTAs have been able to raise and spend hundreds of thousands—even millions—of dollars to supplement public funding in a largely unregulated environment. These resources are simply unavailable to students in poorer schools, who must make do with public funding alone. This situation inevitably contributes to educational inequalities—even though it is completely hidden when looking at public spending.

How PTAs spend their dollars

To understand how PTA contributions influence districts and schools, this report looks in depth at parent fundraising in one large city: Washington, D.C. On the whole, the District of Columbia serves a high percentage of students living in poverty; around 75 percent of students in D.C. Public Schools, or DCPS, are from low-income families.³² Throughout the city, however, there are pockets of wealth. In 2013-14, the district's five wealthiest PTAs—associated with schools serving an average of only 8 percent low-income students—raised a total of over \$2.9 million for schools located mostly in Northwest Washington.³³ The top PTA was Janney Elementary School's, which raised almost \$1.4 million—about \$2,220 per student—while the next four PTAs each raised between \$460,000 and \$300,000. These funds paid for after-school programs, equipment, arts programs, and various enrichment activities. Some of this revenue comes from fee-for-service after-school programs.^{34*} Meanwhile, in the district's highest-poverty schools—mostly located in Southeast Washington—schools had to pay for some of these same programs with public dollars, leaving less funding for other resources, staffing, or education or enrichment activities. See Appendix Table 3 for more on the district's five wealthiest PTAs.

a result, schools with minimal donations—usually less affluent schools—have fewer resources to supplement clubs, sports, or equipment. At Horace Mann Elementary, the PTA pays for additional staff members to teach art, music, and physical education and gives teachers additional supplies and materials on top of what the district offers.³⁵ At Stoddert Elementary, parents' dollars cover a large number of clubs, as well as a drama program.³⁶ Several PTAs devote resources to expanding opportunities for students to go outside and play.³⁷

The DCPS funding formula does differentiate public funding based on the number of students at each grade level and in different special needs categories, including special education, English language learners, and those “at risk” for academic failure.³⁸ DCPS would not disclose how or if it factors in parental donations when determining school budgets or allocations.³⁹ However, it did report not having a policy to equitably redistribute parent donations or to prohibit these additional dollars from being put toward staffing.⁴⁰

Lower-income school communities in Washington, D.C., are at a clear disadvantage when the largest parent-teacher associations in the area can mobilize millions of private dollars to substantially enhance their schools. By providing resources to schools without factoring in the role of outside dollars, Washington allows the most affluent students and their schools to receive more money than the students and schools who have the highest need.

Protecting core school functions by setting limits on parent donations

Some districts have policies to temper the impact of parent donations. One approach is to restrict how schools can use donated funds, specifically banning the use of parent donations for school staffing. Schools can use these dollars for other forms of enrichment, such as field trips or new after-school activities. However, school or district leaders cannot use these funds to purchase new staff positions, such as new art teachers, additional math teachers, or classroom aides. Generally, this restriction prevents PTAs from influencing school staffing arrangements.

We compared two districts to assess the effect of this restriction on fundraising rates and found evidence that these policies may have very little impact on parent contributions.

school staffing. Montgomery County itself is a suburb directly outside Washington, D.C., where the median household income for families with children is \$115,700.⁴¹ Montgomery County serves around 150,000 students, 35 percent of whom qualify for free and reduced-price lunch.⁴² Around 70 percent of students in Montgomery County are students of color. One of the district's largest cities is Bethesda, Maryland, where the National Institutes of Health are headquartered.

Since 1989, the school district's board of education has regulated how private donations can be used in schools. Specifically, the board's policy stipulates that "funds raised by fund-raising groups cannot be used to employ anyone to work in the schools during the regular school day."⁴³ Among other restrictions, this means that schools can only use parent donations to supplement schools' activities, such as field trips, or to provide enrichment activities after school, such as student chess clubs.

We compared Montgomery County to a demographically similar district in the same state that does not have any limitations on the use of PTA donations.⁴⁴ Anne Arundel County is another suburb outside Washington, D.C., where the board of education does not restrict parent donations to nonpersonnel expenses. While this district might not be as well-known as Montgomery County, its largest city, Annapolis, is home to the U.S. Naval Academy. The Anne Arundel County school district serves half as many students as Montgomery County—around 80,000 in total—but has similar levels of poverty. Thirty-two percent of the student population qualifies for free or reduced-price lunch.⁴⁵ The median family with children earns \$102,000, around \$14,000 less than in Montgomery County.⁴⁶ However, Anne Arundel County is much less racially diverse. Students of color only comprise around 40 percent of all students in the district, 30 percentage points lower than in Montgomery County.⁴⁷

We focused on a subset of PTAs in Montgomery and Anne Arundel counties for which we had complete data over three recent FYs—2012, 2013, and 2014. We were able to include parent organizations that filed either an IRS Form 990 or a Form 990-EZ in those years.⁴⁸ However, several known PTAs are missing because their revenues were low enough—typically, less than \$50,000—that they were not required to report, or we were unable to locate recent financial information from the IRS or other sources of tax reporting information. Given these data limitations, our research only identified around half of all PTAs in each district.⁴⁹

Montgomery County and the Anne Arundel County school districts. Montgomery County PTAs raised around \$70 per student during the years 2012 through 2014, while the PTAs in Anne Arundel County raised slightly less—around \$60 per student.⁵⁰ In 2014, Montgomery County PTAs raised four times as much—around \$2.9 million dollars in total—compared with Anne Arundel County PTAs, which raised around \$700,000. The difference in total revenues is largely a result of district size, as there were four times as many students represented by the Montgomery County PTAs. After accounting for differences in how much families earn, both districts' PTA revenues remained steady during this time period, with per-pupil PTA revenues equal to 0.06 percent of the income of the median household with children.

In both districts, schools serving the most affluent students received tens of thousands of dollars in additional funding each year from parents, while the highest-poverty schools received very little, if anything, from their PTAs. In Montgomery County, for example, the PTAs of the 10 most affluent schools raised at least \$700,000 in 2014, or an average of \$170 per student, and the PTAs of Anne Arundel County's 10 most affluent schools raised at least \$240,000, or an average of \$100 per student. In both districts, students in high-poverty schools did not benefit from this influx of parent contributions. Unfortunately, we could not locate financial data for every PTA, so we could not identify PTA revenues for all of the most affluent and highest-poverty schools.⁵¹ Based on available information, however, we expect that, with more financial information, the total PTA revenue for the most affluent schools would be even higher, and students at the highest-poverty schools still would receive minimal parent contributions.

Furthermore, our analysis suggests that a prohibition against using parent donations for school staffing does not influence contributions. During the years studied, Montgomery County's policy likely did not depress PTA fundraising. Despite the prohibition, the most affluent families in Montgomery County still provided hundreds of thousands of additional dollars to enrich their children's school experiences. And in both Montgomery County and Anne Arundel County, parents donated a similar share of their families' overall budgets.

Paying attention to parent donations alone is therefore likely not enough to reduce staffing inequities. Montgomery County's policy ensures that parent dollars do not exacerbate these inequities, but it does not address deeper staffing disparities that frequently occur between the most affluent and the least affluent schools.

and after Montgomery County implemented its policy and therefore cannot know the policy's full impact on parent contributions. It is possible that, absent the policy, parents would be donating even more than they did in the years of the data we analyzed.

Equity grants

Another district has taken a different policy approach to parent contributions to schools. Portland Public Schools in Oregon has leveraged parent fundraising across the district to increase funding equity in its highest-need schools. Since the mid-1990s, a citywide foundation in Portland has captured a portion of the district's parent donations and redistributed them back to schools based on student need. During a recent school year, the foundation gave over \$550,000 in "equity grants" to high-need schools.⁵²

Since the beginning of the program, the Portland Public Schools Foundation, or PPSF, has enabled schools to start their own Local School Foundations to raise private dollars to pay for in-school staff positions.⁵³ These foundations must give one-third of their total revenues—after the first \$10,000—to the district foundation. In turn, the PPSF gives dollars to schools based on a formula that accounts for several factors: PTA funds, local school foundation funds, previous equity grants, federal Title I funds, and student demographics. The equity grant pool grew from \$845,000 in 2012 to over \$1 million in 2014.⁵⁴

While equity funds seem like a natural response to the problem of PTAs helping the rich get richer, some parents may limit their contributions if a portion of their donations does not benefit their child's school. There is no research on these policies' actual effect on parent giving; however, there was significant opposition among some parents in at least one district—California's Santa Monica-Malibu Unified School District—that implemented a similar equity fund. Some parents were angry that they did not have control over their private donations and warned they would be less likely to donate in the future.⁵⁵

To better understand the sizable impact of these policies, we compared parent contributions in Portland Public Schools with parent contributions to Seattle Public Schools, a district of comparable size and demographics that does not have an equity fund. We found that policies that equitably redistribute donations—or divert a portion of the contributions to affluent schools to high-poverty schools with more significant need—did not substantially reduce overall parent contributions.

50,000.⁵⁶ In 2014, average per-pupil spending in Portland was nearly \$11,000; in Seattle, it was approximately \$12,000. Both student populations are around 10 percent English language learners—with Portland at 7.7 percent and Seattle at 13.2 percent—and around 40 percent of students in both districts qualify for free and reduced-price lunch.⁵⁷ However, the cities differ in terms of their overall wealth and income. Seattle's median property value is \$437,000, while Portland's median property value is more than \$100,000 less.⁵⁸ Seattle's median household income for families with children is \$103,900, around \$27,000 more than Portland's.⁵⁹

We compiled financial data for Seattle Public Schools' and Portland Public Schools' PTAs based on a similar approach to the one employed in the previous subsection. We again focused on a subset of PTAs for which we had complete data over FYs 2012, 2013, and 2014.⁶⁰ As described above, due to data limitations, our study only covers about half of all PTAs in either district.⁶¹

Over the three years studied, parent fundraising looked similar in both districts. Portland's PTAs raised less each year than Seattle's PTAs, but those differences are consistent with differences in average earnings within each city. During the same time period, Portland's PTA revenues increased from approximately \$130 to \$140 per student, remaining around 0.18 percent of median household income for families with children. In 2014, parents raised over \$3.2 million in total. Between 2012 and 2014, the revenues of Seattle's PTAs increased from approximately \$340 to \$370 per student, remaining relatively steady at around 0.35 percent of median household income for families with children. Seattle's PTAs outraised Portland's PTAs yearly revenues by 2014, earning \$7.3 million in revenues.

When comparing contributions to overall family income, parents in the Portland Public School District donated less to their schools. While there may be other factors at play, such as the strength of PTAs' fundraising teams or a difference in the community's culture around donations, this may show that Portland's equity fund has depressed revenues slightly relative to where they would be in the absence of the policy. Relative to the amount that the Portland and Seattle school districts spend per student—approximately \$11,000 and \$12,000, respectively—the difference between the districts' PTA contributions is quite small, less than 2 percent of per-student district expenditures in 2014. This minimal difference shows the equity policy does not drastically reduce contributions.

Portland Public Schools has been able to leverage parent fundraising to benefit its highest-needs schools in ways that Seattle's most disadvantaged schools do not. In 2013-14, for example, the 10 most affluent schools in Portland raised at least \$750,000, while the 10 highest-poverty schools received very little money in parent donations. Through equity grants, however, the high-poverty schools received at least \$270,000, substantially narrowing the parent funding gap.⁶² In Seattle, on the other hand, the 10 most affluent schools received at least \$1.6 million, while the 10 highest-poverty schools did not receive any parent contributions or additional funds through redistribution. Given that financial data was not available for every PTA, we could not identify PTA revenues for every one of the top 10 or bottom 10 schools.⁶³ With more financial information, it is likely that overall PTA revenues for the most affluent schools would be even higher.

This approach to improving equity is not perfect. As mentioned above, the Santa Monica-Malibu Unified School District had an equity fund for many years before dropping the approach in 2011. In 2014, the district implemented its revised parent donation policy, which centralizes fundraising for school staffing and programming. PTAs can fundraise for other school needs, such as field trips and equipment.⁶⁴

An evaluation study of the district's equity fund highlighted several implementation challenges.⁶⁵ Some PTAs simply did not comply with the district's policy to give back some dollars, and the district had difficulty figuring out how to exempt some PTA expenses fairly from redistribution.⁶⁶ The evaluators did not examine how this policy affected PTA revenues, but there was significant pushback from members of the community, with some parents threatening to reduce donations during initial policy negotiations.⁶⁷ A group of parents voiced that the approach was punitive, and that instead, parents should be encouraged to donate to a separate equity fund or to other, less affluent schools.⁶⁸ Other districts that have considered establishing an equity fund have feared similar pushback, worrying that rich parents will threaten to leave the district, disinvest in their schools, or decrease their overall contributions.⁶⁹

Districts should pay attention to these concerns and considerations as they work to improve equity. Similar to the limitations in our analysis of the impact of donation usage restrictions, we cannot assess the full impact of equity funds on parent giving because we did not analyze Portland's parent donations before and after it implemented the equity policy. However, our research suggests that equity policies did not significantly reduce the amount of parent donations.

Therefore, district leaders might be able to implement redistribution of funds featured here without the risk that parents will take their dollars outside the school system.

Select a Chapter

▼ Equity

Recommendations

To address the outsized influence of parent donations on school finance, states and districts can take several steps to ensure that schools serving disadvantaged students have all the resources that they need in order to provide students an excellent education. The first three recommendations address resource equity more broadly, while the remaining recommendations focus specifically on parent donations.

Addressing resource equity

States should encourage districts to require schools to report their private contributions

As a component of new state plans required under the Every Student Succeeds Act, states should promote greater transparency around private dollars by encouraging districts to require schools to accurately report and publicize private contributions. Greater awareness around the inequity of private dollars is an important first step to gain community buy-in for policies to allocate resources equitably.⁷⁰ Prioritizing accurate reporting should also make it easier for districts to consider private donations in their larger budgeting decisions.

Districts should annually assess the needs of every school to equitably allocate funding

Districts should launch an annual needs-based assessment initiative to evaluate programs, services, and staffing on every campus, and they should use this information to adjust all of the resources and funding they allocate to individual schools. This will help ensure that every school has the resources it needs to provide a high-quality, well-rounded education to its students.

One way to do this is through weighted-student funding. In such systems, the district allocates resources to schools based on student enrollment, where students with more risk factors receive more funding weight. For example, a student from a low-income family could count for 30 percent more than a base per-pupil allocation, or a student with a disability could count for 100 percent

Nevertheless, weighted-student funding or other systems to distribute funds based on need cannot make all dollars equal. Even if high-poverty schools receive more money, some programs or uses, such as facilities upgrades or enrichment activities, are more easily purchased with private, less-restricted dollars, such as those provided through parent donations.

Districts should support partnerships between schools across the socioeconomic spectrum

Beyond dollars and cents, promoting partnerships between affluent and higher-poverty schools would improve offerings on both campuses.⁷¹ Several school systems already take a similar approach—focused on performance rather than demographics—that could be transferred to high- and low-resource schools. In Shanghai, China, high-performing schools partner with low-performing schools for school improvement while school districts typically fund the partnership.⁷² The partnership usually lasts for two years, which is believed to be an adequate period for turnaround and sets a time limit for external intervention. In addition, the low-performing school can adopt the name of its high-performing counterpart to signify the partnership. This creates additional buy-in for the high-performing school, as the poor performance of an affiliated school may influence the primary school's reputation.⁷³

Massachusetts, Tennessee, and the consortium of CORE districts in California also leverage partnerships as part of their school accountability systems, often supported by federal school-improvement funding. Massachusetts and Tennessee identify the highest-performing 5 percent of schools and incentivize them to give back to the lowest performing schools by offering competitive grants. The funding allows the schools to serve as demonstration sites and share best practices.⁷⁴

Regulating parent donations to tackle funding inequities

Policies that reduce the inequities of parent donations are often difficult to implement and can influence overall parent giving. Different approaches may be more viable in different districts and less likely to affect parental engagement. Districts should assess donations' impact, as well as community openness to reallocate donations, to determine the best approach to address district inequities. The following policies offer different strategies to combat inequities. Districts should consider the advantages and challenges of each strategy when selecting a policy to implement.

We recommend that districts pool a small portion of parent contributions to redistribute to high-needs schools, similar to the policy in Portland, Oregon. Our research suggests that districts can establish and grow equity funds based on parent donations without seeing a significant reduction in affluent parents' contributions. These policies, however, are politically challenging and can receive significant pushback from some families in the community.

To successfully develop and implement a sustainable equity fund, districts' highest levels of leadership should be committed to the policy to ensure that it is steadfastly implemented despite pushback. Community engagement and involvement is also essential. District leaders should promote awareness of the discrepancies in funding and resources prior to the rollout of the policy and carefully select key messengers who are well-respected by affluent parent groups. After a draft policy is developed, all stakeholders should be invited to participate in discussions about the policy's implementation, ensuring that every community member has the opportunity to voice their opinion while not inviting a debate of the policy's existence.⁷⁵

Districts should impose restrictions on the usage of donations

We also recommend that district leaders follow Montgomery County's approach and put restrictions on how schools can use parent donations, including banning the use of private dollars to pay school staff. These restrictions can help ensure that all schools have access to equitable public funding to meet their staffing needs. Affluent schools will not be able to use the donations to supplement their staffing budget to hire additional staff. This approach likely does not affect the amount of parent donations since the dollars stay with the designated school, but it does not resolve resource inequities.

Districts should incorporate predicted parent donations into school budgets

Districts should not be blind to the impact of parent donations when developing their school budgets. These funds are real sources of revenue, they can be significant, and they are often predictable. Districts should consider parent donations when determining how to direct funding from a district-wide donation, grant, or unexpected budget surplus. Districts should project each school's yearly private contributions based on PTA revenue and subtract that amount from the amount the district plans to allocate to each school. This approach would minimize the risk of

and the shifting of resources would occur during the larger, nuanced budget process.

Districts should encourage donations that promote district-wide benefits

Districts should also encourage donations to funds or causes that promote district-wide opportunities. For example, districts can partner with and direct parent contributions to community organizations that offer enrichment programs to multiple schools. Rather than using the private funds to supplement an art teacher's salary at one given school, for example, a local art museum can increase programming for the entire district. Incentivizing this type of giving will increase the number of students who benefit from parent contributions and maintain parents' autonomy to direct their dollars as they see fit.

Conclusion

Fundraising is one way for parents to engage with their schools.⁷⁶ But there are political obstacles to reforming school finance policies, particularly when it comes to private dollars. Even if districts successfully implement policies to redistribute parent dollars and reduce funding inequities, they might still risk broader disengagement by affluent parents. Efforts to promote equity of parent donations can also unintentionally set up conflicts within communities, especially among parents across the socioeconomic spectrum.

Despite these risks, achieving resource equity is impossible unless all inputs are considered. Districts cannot ignore the hundreds of millions of dollars in hidden money that PTAs generate for affluent schools. States and districts must think systematically to ensure that all students—regardless of their families' wealth—attend well-resourced schools. States and districts should promote transparency and create structures to ensure that annual school funding allocations consider all inputs and reflect each school's specific needs. Districts must analyze the political environment in their community and implement an approach that will align with donation patterns as well as the community's political will.

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Appendix tables

*** Update, April 18, 2017:** This report has been updated to clarify that IRS Form 990s include all PTA revenue, regardless of source.

Endnotes

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around one-quarter—for which we had complete financial data over the three-year period. These schools had an average poverty rate of 20 percent. Based on IRS Form 990N data, we identified an additional 37 that might have had revenues so low that they were not required to report their actual revenues. In addition, there were an additional four PTAs that were parent organizations for more than one school. We exclude the latter 41 schools. In Anne Arundel County, we compiled complete financial information for 19 out of 88 PTAs, where an additional 19 PTAs likely had revenues too small for reporting during at least one year of our study. Our analysis in Anne Arundel is based on the first 19 school PTAs, where the average poverty rate is 22 percent. ↗

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How budget cuts and PTA fundraising undermined equity in San Francisco public schools

APRIL 1, 2014 | JEREMY ADAMS SMITH/SAN FRANCISCO PUBLIC PRESS



A child buys tickets at the Halloween-Día de los Muertos fundraiser for Junipero Serra Elementary in Bernal Heights. The event netted \$3,000 for the PTA. Credit: Tearsa Joy Hammock, San Francisco Public Press

Evelyn Cheung is the principal of Junipero Serra Elementary School in Bernal Heights. Matthew Reedy is the principal of Grattan Elementary in the Haight. Both San Francisco public schools faced five straight years of districtwide budget cuts — which hit hardest in 2010 with a \$113 million shortfall and last school year came to a more manageable \$13 million.

But the belt tightening did not hurt the two schools equally. Cheung was forced to lay

off staff and take other drastic steps, like freezing supply purchases for a year. By contrast, Reedy hired new staff and expanded his school's academic programs, helping raise standardized test scores.

Why? The difference lay in the ability of their parent-teacher associations to raise money. The Grattan PTA has **budgeted** hundreds of thousands of dollars a year, amounting to almost \$1,000 per pupil. At Junipero Serra, where most students come from poor and immigrant families, the PTA raises approximately \$25 per pupil.

“Every principal knows which schools have it and which schools don’t,” Cheung said. “We know who are the haves and who are the have-nots. The system just isn’t equitable.”

In an era of shrinking public investment in schools, parents have struggled to hold the line one school at a time. Since the pre-recession year 2007, elementary school PTAs in San

Francisco collectively managed to more than quadruple their spending on schools.

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With this money, some schools have been able to pay teachers and staff, buy computers and school supplies, and underwrite class outings and enrichment activities. These expenses, previously covered by the taxpayers, are increasingly the responsibility of parents.

But school district finance data, PTA tax records and demographic profiles reveal an unintended byproduct of parents' heroic efforts: The growing reliance on private dollars has widened inequities between the impoverished majority and the small number of schools where affluent parents cluster.

Unlike some California school districts, which centralize and redistribute funds raised by parents, San Francisco so far has permitted all money raised at a school to stay there. This gives some schools an enormous advantage. School district data show that in 2011 (the most recent year tax records were available), **parents of children at just 10 elementary schools raised \$2.77 million** — more money than those at the other 61 combined.

By bringing in as much as \$1,500 per student, the top fundraising schools appear to have been largely insulated from the effects of budgets cuts. Meanwhile, parents at high-poverty schools such as Junipero Serra are seeing shrinking resources for their children. This means laid-off staff, dilapidated libraries, outdated computers and a dearth of essential supplies like pencils and paper.

Rachel Norton, president of the San Francisco Board of Education, said she and her colleagues were aware of significant disparities in the fundraising capacities of PTAs in the district. But administrators do not track donations, nor do they attempt to interfere with school fundraising.

"I'd never ding parents for raising money to provide more services and extras for their schools, especially in a state like California that has chronically underfunded schools," Norton said. "The more economically diverse students the schools attract, the better off the schools will be."

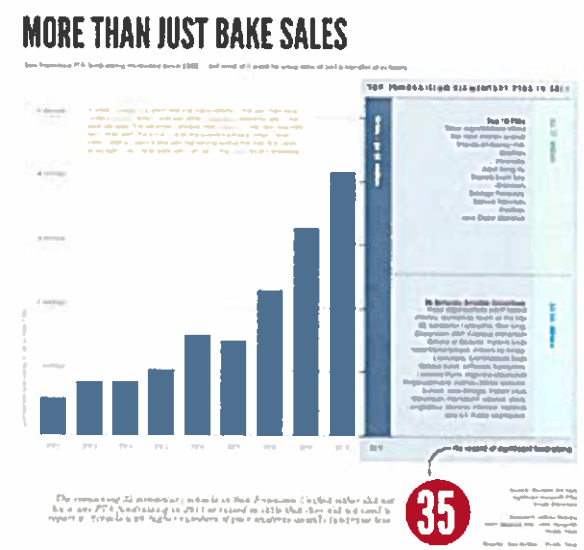
But fewer and fewer schools in San Francisco are attracting economically diverse students. The number of children from poor families is rising across the district, and there are more schools with high concentrations of poverty than there were 10 years ago. Meanwhile, the number of mixed-income schools is shrinking.

Critics of rising income inequality say school districts across the country, in a rush to save public schools with private dollars, created a system in which education is improving for the affluent and declining for the poor.

“Parent fundraising has become more important as state and local funds have dwindled,” said Robert Reich, a former U.S. secretary of labor and now a political science professor at the University of California, Berkeley, who advocates for policies to close the gap between rich and poor.

“If we take the ideal of equal opportunity seriously,” Reich said, “we’ve got to commit ourselves to creating a system of public education in which kids from poor and working-class families have a genuinely equal opportunity to succeed. And we’re falling far short.”

In an effort to address unequal parent fundraising head-on, some Bay Area school districts have pioneered novel solutions that might be instructive to San Francisco. One is aggregating private dollars, and directing them to the schools that need the most help. Other California districts prohibit PTAs from paying for teacher salaries or training, a common practice that can significantly widen inequities among schools.



But with an expected influx of state money this year, San Francisco will have new policy options to address the growing inequities in the district. The city’s schools stand to bring in as much as \$21.7 million more as soon as September, through Gov. Jerry Brown’s newly enacted Local Control Funding Formula, which provides extra funds to districts with many disadvantaged students. If student

San Francisco PTA fundraising increased since 2002, but most of it paid for programs at just a handful of schools. (Click to enlarge) Graphic by Tom Guffey, San Francisco Public Press

populations remain stable, this new money could grow to \$184.6 million annually in eight years.

With a current school district budget of \$667 million, the new funds would represent an increase of 27 percent.

As San Francisco's Board of Education prepares to hold public meetings this spring on how to spend the extra funds, the fate of increasingly unequal public schools could be in the hands of parents themselves. That may mean endorsing reforms to ensure more equitable local funding, or agreeing to share fundraising proceeds among schools.

Some schools dodged cuts

Matthew Reedy started working as a teacher at Grattan Elementary in the Haight in 2002. That was the year the district's Weighted Student Formula took effect. The policy, devised as a way to help disadvantaged children, provides schools with a base rate of funding for each student, currently \$2,896, and adds dollars based on need, such as the number of children receiving special education services, free and reduced-price lunches and lessons in English as a second language. So per-capita funding for schools is highly variable but generally biased toward schools with disadvantaged students.

The goal is not strict equality, but rather equity, meaning preferential funding for schools that need it most. San Francisco schools with many poor and immigrant students have bigger budgets on a per-pupil basis than do affluent schools, whose students are less expensive to educate.

When the formula went into effect in 2002, Reedy said, affluent schools such as Grattan lost funding, and parents felt compelled to make up the difference.

That year, elementary school PTAs in San Francisco brought in a total of just \$592,000. But through 2011, their combined budgets had ballooned to \$5.32 million, an increase of about 800 percent.

(The Public Press examined data from elementary schools only based on the tax records of

legally recognized PTAs.)

As parent fundraising increased, so did the gap between the richest and poorest schools.

In 2010, Reedy became Grattan's principal. Today, only 21 percent of 359 students there qualify for free and reduced-price lunch. That is one-third the district average, making it one of the wealthiest schools in a district whose students overall have gotten poorer. Not surprisingly, the Grattan PTA is one of the most successful fundraisers in the district.

In the 2012–2013 school year, the PTA at Grattan **had a budget of** \$353,000, about \$983 per pupil, on top of the base \$2,896 the school receives from the district for each student. The parents rely on an array of labor-intensive fundraising methods: “Count Me In!” parties with ticket prices up to \$75, wine raffles and auctions, foundation grants, “Dine Out for Grattan” nights at participating restaurants, and a sophisticated e-newsletter and website.

*(See Flickr for a **photo essay on fundraising for public education** by Tearsa Joy Hammock and Luke Thomas)*

Reedy said Grattan has been spared the sting of budget cuts, thanks entirely to these parent fundraising efforts. “We’ve been able to take PTA money and donate it to our general fund to prevent layoffs,” he said.

Not only did the PTA protect jobs, it expanded Grattan's academic programs by hiring reading specialists and a technology teacher, and adding a bilingual clerk and a parent liaison to the staff. The PTA also funds an extra teacher, helping Grattan reduce its average class size. In all, this school year the Grattan PTA is paying all or part of the salaries of six staff, totaling nearly \$224,000. PTA money also supported the library, a garden that doubles as a science lab and a computer lab that is often cited as one of Grattan's key strengths, among other programs.

Like many principals, Reedy sets spending priorities in consultation with a school site council, which includes parents, teachers and neighbors. Their decision to invest PTA funds in academics has paid off. From 2008 to 2013, Grattan improved standardized test scores from 787 to 923 points on a scale of 1,000, making it one of the district's academically best-

performing elementary schools.

While the sums raised by Grattan's PTA may seem tiny compared with a district budget of \$667 million, Grattan's example reveals how small — but concentrated — amounts of private money can keep an entire school afloat. For schools with the means, parent fundraising is a solution to budget cuts.

But the Public Press analysis finds that the majority of San Francisco schools are unable to raise money at the same level. Indeed, reliance on parent fundraising appears to undermine the equitability goal of the district's own funding methods.

How cuts create inequity

Junipero Serra Elementary is situated between Holly Courts, a low-income housing project, and the hilltop Holly Park in Bernal Heights. Visitors hear more Spanish than English in the school's hallways — 90 percent of the 269 students are immigrants or the children of immigrants, mainly from Latin America.

As principal, Evelyn Cheung has had to make hard choices in the past five years, in consultation with teachers and parents. One year they stopped buying supplies. The budget for the library fell to \$500. Cheung was forced to lay off classroom aides, the nurse, the social worker and all “consultancies” — mainly arts teachers. The layoffs hurt morale more than other cuts, Cheung said, “because it's people.”



Karen Curtiss takes a donation at the annual Halloween-Dia de los Muertos celebration at Junipero Serra Elementary School. Credit: Tearsa Joy Hammock, San Francisco Public Press

“They have emotional ties, and there are bad feelings when someone is laid off,” she said.

Why can't Junipero Serra fundraise its way around budget cuts? In part, because the parents have less to give, at least as measured by free or reduced-price lunches. At Junipero Serra, 86 percent of students qualify, more than four times as many as at Grattan.

To qualify for reduced-price lunch in California, a family of four must make less than \$42,643 a year. To qualify for free lunch, less than \$29,965. Researchers use these markers as proxies to measure poverty.

The desperate situation faced by most of Junipero Serra's families is, in fact, shared by 63 percent of families throughout San Francisco's public school system. This represents a 10 percent increase since the start of the recession, which coincided with the start of the budget cuts.

This poverty has also become more concentrated. Data from the district show that the number of schools in which more than three-quarters of students are eligible for subsidized lunch has more than tripled in the past decade. Schools in which fewer than one-quarter qualify increased slightly. Meanwhile, the middle class is disappearing: The portion of schools in between those extremes of poverty and wealth fell, from 66 percent to 52 percent.

While Cheung lauded the ideals behind the weighted student formula, and similar federal programs such as Title I, she said current funding levels were not enough for schools with large numbers of disadvantaged students.

"Many of my parents don't have the resources that many middle-class families have," Cheung said. "We have to provide a computer lab and technology training for the kids because they don't have computers at home. And they will go to middle school very far behind if we don't provide that support."

(See photo essay, "Two PTA Presidents, Two Realities.")

No easy solutions

This is how budget cuts perpetuate inequity: Affluent families are able to make up for lost funding by donating both time and money, whereas schools with poor families struggle to fill the gap. School district data show that as the number of students getting free and reduced-price lunch rises, PTA budgets fall. At the 44 elementary schools where a majority of the students live in poverty, fundraising is insufficient to offset budget cuts. Those cuts add stress to communities already struggling with low wages, financial instability and

discrimination.

Can the system be improved, or are we doomed to perpetuate the cycle of inequality? This problem is not unique to San Francisco. As anti-tax sentiment in recent years has reduced school funding nationwide, parents are increasingly fundraising to keep their own kids' schools afloat.

In response, some California districts created centralized PTA foundations to redistribute funds to schools based on need (see [story](#) on the solution used in the East Bay city of Albany). Others prohibited PTAs from raising funds for personnel or professional development.

The Santa Monica-Malibu school district embraced both solutions in 2011, under Superintendent Sandra Lyon. Today the district's education foundation is the only way parents can donate money to support teachers and staff.

The key worry about such systems is that they will reduce the incentive for parents to support public schools beyond what they already pay in taxes. Lyon said her district struggled with the transition: "There are still some who believe parent money should stay at their children's schools, and they are strongly against the change."

The reform caused some affluent Malibu residents to try to break off from more working-class Santa Monica to create a separate school district. At least one Malibu school refused to participate in revenue sharing.

Overall, the district's PTAs are struggling to raise as much as in previous years, Lyon said. Still, she sees progress. The foundation launched a \$4 million campaign last spring, and by late fall 2013 it had raised \$2.4 million.

"Some of our wealthiest Santa Monica schools have the greatest participation," Lyon said. "Indeed, across Santa Monica schools, some of the loudest opponents have become the biggest champions and are leading the charges at their schools."

Lyon has seen a culture change in a district heavily divided by social class. "Schools are collaborating in ways they had not done before," she said. "The inequity in schools had

bothered many for years, and so there has been support for the notion that we are working to create a better education for all students.”

The Santa Monica-Malibu district is one-fifth the size of San Francisco Unified. Every education leader interviewed dismissed the idea that such a system would work in San Francisco, largely because of the district’s size and diversity. Most defended the status quo.

Many educators fear losing support from affluent parents, who have the option to quit the public schools altogether and enroll their children in private schools — or flee to suburban schools. Harvey Milk Elementary principal Tracy Peoples said fundraising can create that kind of parental engagement.

“For schools like ours that do not qualify for additional funding based on test scores or student demographics, we depend on the parent community to step in to help raise additional funds for our students,” Peoples said.

Because the San Francisco Unified School District does not keep track of donations to PTAs, parents and educators have not had an accurate picture of how they factor into inequities among individual schools.

But as California moves this year to pour millions of dollars into diverse, high-poverty districts like San Francisco, parents and educators must ask themselves hard questions about which students were hurt most by five years of budgets cuts — and who was rescued by PTA fundraising.



Volunteers gathered on a Saturday in November at Grattan Elementary for the first campuswide greening work day.

Some parents have led a grassroots movement to counteract the inequities. Alvarado parent Todd David worked with peers in 2008 to launch EdMatch, a Web-based volunteer effort to enlist corporations and philanthropists to match funds raised for San Francisco public schools. The money was distributed to the most impoverished.

They unloaded two tons of sand, painted, cleaned up and gardened. Credit: Luke Thomas, San Francisco Public Press

“EdMatch is a good system,” board president Rachel Norton said, “because it encourages people to voluntarily opt in,

without penalizing parents who are working really hard.” But EdMatch, while noble in intent, has struggled more than five years to increase participation, raising only \$100,000 last year — well short of its \$6 million goal.

From charity to advocacy

The most effective solutions may be political, not charitable.

Reich counsels parents troubled by growing public-school inequities to turn their energies from giving to advocating for reform. He said they should work to raise tax rates for the wealthy, decouple school budgets from property taxes and target state and local resources to the poorest schools.

In a Sept. 4 op-ed for The New York Times, Stanford political science professor Rob Reich (no relation to the coincidentally named Robert Reich) went a step further, **proposing that the federal government create a special charitable status for school-based PTAs**, so that those who give to poor schools get double deductions and those who give to affluent schools get none.

Norton said the changes in state funding have sparked other possible reform ideas specific to San Francisco.

“We desperately need to reweight the student formula,” she said. This may be the most decisive battle to be waged in the next year on behalf of poor and immigrant schools such as Junipero Serra.

“A well-educated populace is the key to a healthy democracy,” said David, the Alvarado parent, who turned to full-time education activism after a successful Wall Street career. “Public education is an investment, not an expenditure. My grandparents were immigrants. They came to the United States, they got a public education, they lived the American dream. Education is the one way we know that can help each person rise, generation after generation. If you care about the future of America, education for all kids is in all our

interests.”

Jeremy Adam Smith is a fellow with the Institute for Justice and Journalism. He edits the website of U.C. Berkeley's Greater Good Science Center and is author or coeditor of four books, including “The Daddy Shift,” “Rad Dad” and “The Compassionate Instinct.” His son briefly attended both Junipero Serra and Grattan.

Comments

Comments Policy

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► **Manuel** 3 years ago



The article is mainly about SFUSD, but it mentions others, such as Santa Monica-Malibu USD. Curiously, it says nothing about LAUSD which does have a small group of schools that do significant fundraising (\$500 is typical, but the most is around \$1,500/kid). It is small because these schools (around 30 or so) exist in wealthy ghettos in a district where 614 schools have 50% or more of its students qualify for Title I, Part A. The ... [Read More](#)

Don 3 years ago



Manuel, please explain. First you say, “parents who believe that schools should provide a base of services that California is no longer willing to fund.” The you say, “LCFF monies should be able to foot the bill for the librarian, nurse, counselor, psychologist, etc.”

Don't these two statement contradict each other?

► **Dawn Urbanek** 3 years ago



The NEW Local Control Funding Formula Base grant needs to be increased from \$6,500 to an amount that will adequately fund a BASIC education for all students no matter how rich or how poor. That would need to be a minimum of \$9,500. Then if

PPS Parent Equity Fund



Funded by the PPS parent community, the PPS Parent Equity Fund provides needed financial support to high-need PPS schools.

In 1994-95, on the heels of Measure 5's cuts to public education, parents from a number of Portland schools asked the Portland Public School Board to allow them to create a vehicle for raising private dollars to support teaching and staff positions at their schools. The Portland School Board allowed for the creation of "local school foundations" at all of Portland's public schools. The School Board also required that an Equity Fund be established. One-third of all funds raised (after the first \$10,000) by Local School Foundations is set aside in the PPS Parent Equity Fund that we steward and distribute to high-need schools using a [data-driven formula](#); a formula that is examined each year to ensure the funds are reaching the highest need schools.

Since its establishment, the PPS Parent Equity Fund has attracted national attention for its creative and collaborative approach to addressing disparities in school funding and has awarded almost \$11 million in grants to schools in need. Read more from national media outlets: [The New York Times \(6/21/12\)](#) and [Education Week \(3/12/12\)](#).

Resources

[See how the 2016/17 PPS Parent Equity Grant Recipients Used Their Grant Awards](#)

[Formula for determining 2017/18 grants](#)

[How PPS Local School Foundation funds flow into schools and classrooms](#)

[PPS Parent Equity Fund Contribution Calculator](#)

The New York Times <https://nyti.ms/2ojfUJP>

U.S.

PTA Gift for Someone Else's Child? A Touchy Subject in California

By DANA GOLDSTEIN APRIL 8, 2017

SANTA MONICA, Calif. — Of all the inequalities between rich and poor public schools, one of the more glaring divides is PTA fund-raising, which in schools with well-heeled parents can generate hundreds of thousands of dollars a year or more.

Several years ago, the Santa Monica-Malibu school board came up with a solution: Pool most donations from across the district and distribute them equally to all the schools.

This has paid big benefits to the needier schools in this wealthy district, like the Edison Language Academy in Santa Monica, where half the children qualify for free or reduced-price lunch. The campus is decorated with psychedelic paintings of civil rights icons such as Cesar Chavez and the Rev. Dr. Martin Luther King Jr., the work of the school's art teacher, Martha Ramirez Oropeza, whose salary is paid by the pooled contributions. That money has also funded the school's choral program, teacher aides, a science lab and a telescope.

The funding program is considered a national model, and has many enthusiastic supporters. But for some locals it is a sore point that has helped fuel a long-simmering secession movement in which Malibu — more solidly affluent than Santa Monica — would create its own district, allowing it to keep all of its donations in its own schools.

Craig Foster, a school board member from Malibu who favors separation, said parents voluntarily giving money wanted to see the fruits of their donations.

An ideal PTA system gives a parent “the opportunity to put your money where your heart is,” said Mr. Foster, a former managing director at Morgan Stanley and Credit Suisse. “It has to be an emotional appeal, and it has to be for the benefit of the donor.”

Indeed, the powerful appeal of helping one's own child has turned the apple-pie PTA into a mirror of society's larger stratification. According to a new report by the Center for American Progress, a liberal advocacy group, schools that serve just one-tenth of 1 percent of American students collect 10 percent of the estimated \$425 million that PTAs raise nationwide each year.

And those schools, not surprisingly, are some of the least needy, according to the study, which analyzed PTA tax returns from 2013 and student demographics. The richest PTA in the nation, with \$2 million in revenue, was at Highland Park High School in a suburb of Dallas, where no one qualified for free or discounted lunch. (Nationwide, about half of public school students are eligible.)

Only 9 percent qualified at the second-richest, Public School 87 on Manhattan's Upper West Side, where the PTA's revenue exceeded \$1.5 million. The money was used to pay for dance, yoga, chess, and math and literacy coaching.

The issue has bedeviled policy makers who abhor the idea of unequal classrooms, but also do not want to discourage families from digging into their pockets. In California, for example, schools may depend on donations because the state's Proposition 13, passed by voters in 1978, keeps property taxes relatively low.

Leaders at several overachieving PTAs also said their generosity addressed another kind of inequality: Their schools did not benefit from Title I, the federal taxpayer-funded program for schools that serve large numbers of poor children.

But Catherine Brown, a co-author of the report, said that when richer PTAs paid for teachers and programs that poorer ones could not afford, students in less well-off schools fell even further behind.

“Kids that come from needier backgrounds need more money,” she said. “They have more of a vocabulary gap before they even get to school, and their home environments are not as literacy-rich. They need greater investments in order to achieve their full potential.”

Only a handful of school districts nationwide, including Portland, Ore., and Palo Alto, Calif., have tried to put their fingers on the scale by restricting the use of PTA money at individual schools.

In New York City, PTAs may not pay for teachers of core subjects — English, math, science and history — so that all schools have comparable access to that instruction.

There is no shortage of affluence in Santa Monica or Malibu, two sun-kissed coastal communities with elegant homes and designer boutiques. At this year's PTA gala for Point Dume Marine Science Elementary in Malibu, 10-person tables cost between \$2,000 and \$15,000. In an auction, parents could bid on a Las Vegas vacation, private chef services and a pink guitar signed by the Red Hot Chili Peppers.

But there is poverty, too; of the 11 elementary schools in the 11,000-student district, four in Santa Monica, including Edison, qualify for Title I aid. Half of Edison's students come from low-income families, and three-quarters are Hispanic. (The school is not affiliated with EdisonLearning, the for-profit education company.)

A telescope or new science lab “would never happen here” without pooled fund-raising, said Edison's principal, Lori Orum.

“We're not the community where people are writing \$2,000 checks,” she said. “We're happy if we get \$20 out of people.”

The donation-balancing system was put in place in 2011 by the district's crusading former superintendent, Sandra Lyon, and the elected school board. Malibu parents — and a few from Santa Monica — objected to the change, saying they worried that affluent families would stop giving altogether or flee to private schools. At one rowdy school board meeting covered by Malibu Patch, a local news website, a Malibu mother said the plan would “bring everybody to a mediocre middle ground that serves nobody.”

Parents can still donate to their own schools to cover expenses like campus beautification, technology and field trips. But those who wish to help pay for teachers' salaries or school-day science and arts programs must now donate to the Santa Monica-Malibu Education Foundation, which redistributes the money across schools.

Total donations — between \$4 million and \$5 million annually — did not appear to drop in the first couple of years, according to tax returns for the foundation and 15 school-level PTAs, though more recent records are not available. But just 21 percent of Malibu families have donated to the central fund this school year, compared with 41 percent of Santa Monica families, according to foundation data through February.

Megan Histan, the PTA president at Franklin Elementary in Santa Monica, said that sharing parent donations across schools was “pragmatic,” since all the district's students feed into two high schools, and that parents should want their children's classmates to be academically and socially well prepared.

Still, some parents at her school, one of the wealthiest in the district, objected after their PTA gave \$200,000 to the central fund when it was falling short of its fund-raising goal last year.

“The idea that a parent is helping another child without helping their own child is a myth,” said Ms. Histan, who has worked in theater production and, in addition to her labor running the PTA, is a stay-at-home parent.

But Mr. Foster, the only Malibu resident on the school board, called the

centralized fund-raising system “ideological,” and said it was a poor fit for a district as divided and sprawling as Santa Monica-Malibu, which combines two discontinuous towns with schools up to 23 miles apart. During rush hour, it can take nearly an hour to make the drive up Route 1 between urban Santa Monica and beachy Malibu, and for decades, some Malibu activists have wanted to separate the district into two.

That movement accelerated after the new fund-raising system began. It gained another boost in 2013 when toxic PCBs were discovered in several Malibu schools and parents were dissatisfied with the district’s response. A school board vote on separation will take place this year, potentially followed by a referendum in each community.

Even if not universally beloved, the shared-donation program has become such an integral part of the district’s culture that some advocates of secession say that if Malibu becomes its own district, it should have a centralized donation system to equalize funding across the town’s four schools. They point out that disadvantaged children are in Malibu, too — about 12 percent of the student population qualifies for free or discounted lunch, compared with 30 percent in Santa Monica.

On a recent Friday morning at Juan Cabrillo Elementary School, which is perched on a hill overlooking the Pacific, Malibu parents watched their fifth graders put on a ballroom dance performance. The students had studied with a dance teacher from a local college, in a program paid for by the centralized donations distributed by the Santa Monica-Malibu Education Foundation.

The foundation also supports Cabrillo’s art, science and music programs. Several parents said they were grateful for the group’s support. But they think Malibu could pull in even more money if it separated from Santa Monica.

“I wish the kids could get more,” said Karen Clark, treasurer of the Cabrillo PTA — for example, dancing in the third and fourth grades, in addition to fifth grade. “We would do just fine” if Malibu became its own district, she said. “The

Malibu community would be very generous.”

A version of this article appears in print on April 9, 2017, on Page A1 of the New York edition with the headline: Share PTA Aid? Some Parents Would Rather Split Up District.

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School Fundraising: How Much Is Too Much?



SZEPEY/THINKSTOCK

What does fundraising equity mean for your school?

by Evelyn Beck and Emily Graham
04/23/2015

It's a classic catch-22. With deep cuts to school budgets in recent years, parent groups feel the pressure to raise more money than ever. At the same time, some PTOs and PTAs have been met with district policies that limit fundraising or require groups to share their proceeds with other schools. Why would cash-strapped school districts put limits on how much parent groups can fundraise?

What's Going On

In many areas, parent groups and other school organizations are limited to one or two fundraisers per year to avoid exhausting the support of the school community. But in a growing number of communities, it's considered an issue of fairness. While PTOs and PTAs in affluent communities have managed to raise more money to support their schools, the parent groups in many working-class neighborhoods have not. The result is an imbalance in fundraising that some fear has widened the

gap between rich and poor schools.

Take the case of the school district for Santa Monica and Malibu, Calif. Before the district changed its policies on fundraising in 2004, it noted that some schools raised more than \$1,000 per student, while others raised less than \$20 per student.

“In our district, there’s a lot of diversity from school to school,” says Rochelle Fanali, president of the Santa Monica-Malibu PTA Council. “As a result, we saw some schools able to raise a significant amount of money to add programs to the school base—music, art, even professional development for teachers. It got to a point where it was significantly changing the quality of the educational experience from school to school in a single district. The promise of public education is leveling the playing field, no matter where you come from. We weren’t fulfilling that promise in our district.”

How Districts Have Responded

School districts have addressed the question of how much fundraising is too much in a variety of ways. The most common rules are about how a parent group can spend its money. But more districts are limiting the number of fundraisers school organizations can conduct per year. Some districts have policies that make a distinction between sales fundraisers and events like car washes, as well as passive fundraisers, like labels or box top collections, and set different limits on each type.

Rules have also been established in many places to limit what PTO and PTA funds can be used for. The intent is to keep a parent group at one school from funding teaching positions or special equipment while other schools go without them. In Albany, Calif., where the superintendent noted a disparity in enrichment opportunities at elementary schools, PTAs were prohibited from funding in-school enrichment such as field trips or art classes. Instead, the groups were asked to contribute to an annual giving campaign that splits proceeds among the schools.

In the Santa Monica-Malibu Unified School District, a 2004 policy required that 15 percent of PTA revenues raised be donated to a centralized equity fund. This money was distributed on a weighted formula per capita, with all 16 schools getting a cut. PTA Council president Fanali says that initially there was a lot of negative reaction to the equity fund, but once parents got used to it and realized that their school would get at least a portion of the money back, the protests dissipated.

The district changed its fundraising policy again in 2011, when new rules adopted by the school board barred PTAs and booster clubs from paying personnel costs. Donations toward personnel costs can only be raised through the Santa Monica-Malibu Education Foundation. The foundation funds programs and professional development, and the PTAs support the rest. Parents are educated about this distinction between funds raised for their school PTAs (“stuff”) and for the foundation (“staff”) and encouraged to support each.

Individual parent groups in Malibu and Santa Monica now make appeals for direct donations to the foundation, help with districtwide fundraising efforts such as a community party on the Santa Monica

pier, and donate part of their own fundraising proceeds as they see fit. It's easy to see the foundation funds at work—in the form of literacy coaches and training for classroom assistants, for instance.

What It Means for Your Group

With the wide variety of parent group fundraising and spending policies across the country, it's important to make sure you understand your district's policies before planning your fundraisers and making decisions about how to spend your group's money. Start by getting a copy of your district's policies from your principal or district office.

If your district does limit you to a few fundraisers a year, it doesn't have to be a big negative. Although it may not seem like it, such limits can actually help strengthen fundraisers. Groups that continually fundraise find that fundraising fatigue sets in, and financial support erodes over time. And there's another advantage to having limits on fundraising: Your parent group leaders can spend less time on fundraisers and more time on building the group's volunteer base.

If your district does limit fundraising activity, talk with a school district official to make sure you understand the policy. Do the restrictions apply to passive fundraisers like label and box top collections? Where do ongoing fundraisers like spiritwear or concession stands fit within the policy?

Make the most of your limited fundraising with careful planning. Seek out advice from your fundraising company representative on how to maximize sales. Take the time to look for business sponsors for your events.

If your parent group is in a situation where you're asked to share fundraising proceeds, appoint a liaison to the district fund or education foundation to promote good communication. Find out how much of the money your group contributes may be coming back to the school, and adjust your PTO's budget accordingly.

Resist the temptation to boost your income by adding more fundraisers. Instead, work to maximize the profits of your regular fundraisers. Also keep in mind the many ways your parent group can help your school that don't involve money, such as organizing library volunteers or scheduling reading tutors.

With fundraising equity getting so much attention, it's a good time to think about where your parent group fits in. If your group struggles with fundraising, you might discuss the issue of fundraising equity with the school district. Or you could seek out an area parent group to partner with (see "A Different Approach," right). If your group's fundraising efforts are strong, think about what you can do to help other groups. Perhaps it's providing volunteers for the other school's events or working together on a community fundraiser. Whichever situation your parent group finds itself in, remember that fundraising is only one piece of the important work you're doing for your school.

A Different Approach

North Carolina's Charlotte-Mecklenberg Schools have taken a more low-key approach to fundraising inequities. Instead of pooling funds, they pair parent groups that want to work together to share resources. The program, called SchoolMates, is about 12 years old and is currently administered by Ana Brown, the district's volunteer coordinator. A PTO or PTA must request the match, which is then fostered by Brown.

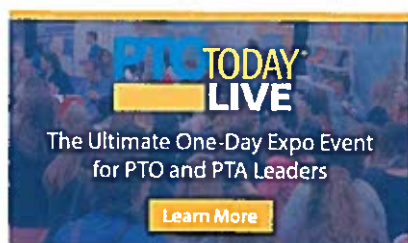
Once matched, representatives from each school meet to decide how they can help each other. "We always try to make it a two-way street," Brown says. For example, a school with a lot of parent involvement might offer expertise and volunteers while a less advantaged school might invite teachers from the other school to some of the training their teachers get through Title I funding. Sometimes the schools hold joint fundraisers like a staff versus staff basketball game, or one school might help the other put on a book fair. Or sometimes one school will donate the profits from a particular fundraiser to the other school.

Assistance goes beyond fundraising, including advice on how to start a parent group or a coat drive for needy students. "Money is a very, very, very small part of it," Brown says. "Many don't do that. They just share the most important resources—the parents. The monetary part that happened is very small and is not what the partnerships are about. It's about sharing the resources both schools have."

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SchoolMates

When schools work together, they can mutually benefit from the other's strengths.

"Life's most persistent and urgent question is: What are you doing for others?"

– Dr. Martin Luther King, Jr.

What is SchoolMates?

Created to promote school-to-school partnerships, SchoolMates offers participating schools the opportunity to work together, mutually benefiting the other's strengths.

Areas in which SchoolMates partners could help each other include: tutoring, mentoring, PTA/PTSA leadership development, community and business relations fundraisers, book drives, pen pals, character education opportunities, multicultural activities, class readers, lunch buddies and office/teacher assistance. Special projects such as assisting with book fairs and school carnivals provide additional opportunities.

Frequently Asked Questions

Q: Why establish a partnership with another school?

A: Partnering with another school is rewarding for students, staff and volunteers at both schools. It will

enable your school to reach beyond its boundaries and tap resources in the larger Charlotte-Mecklenburg community.

Q: Do all schools share the same needs?

A: No. Every school has specific needs. The Office of Strategic Partnerships will help fit your school's resources with another school's needs and vice versa.

Q: Where do we find volunteers?

A: Start with your school community and then look to local businesses, faith-based organizations, senior citizen centers and area colleges and universities.

Q: How much volunteer time is required?

A: Every partnership will be different. You and your partner school determine what is best for both schools.

How To Get Started

- Talk to your principal about SchoolMates.
- Explain the SchoolMates concept to your PTA/PTSA president and/or School Leadership Team.
- Recruit an enthusiastic person to represent your school and be a point of contact.
- Call the Office of Strategic Partnerships at 980-343-0474 to get more information.

Office of Strategic Partnerships

Phone 980-343-0474

Visit us on the Web at www.cms.k12.nc.us. Click on the Volunteers and Partners tab and then click on Office of Strategic Partnerships.



SchoolMates, *continued*

CMS has 57 SchoolMates partnerships for the 2012-2013 school year.

There are 59 schools participating in the program.

The participating schools are alphabetically listed below in red next to their SchoolMates partnering school(s).

Partnering Schools

Albemarle Road Middle	Community House Middle
Alexander Graham Middle IB	Sedgefield Middle
Allenbrook Elementary	Bain Elementary
Ardrey Kell High	Pineville Elementary
Ashley Park Pre K-8 School	Polo Ridge Elementary
Bain Elementary	Allenbrook Elementary
Ballantyne Elementary	University Park Elementary
Barringer Academic Center	Jay M. Robinson Middle
Berryhill Elementary	Mc Kee Road Elementary
Berewick Elementary	Lake Wylie Elementary
Beverly Woods Elementary	Sterling Elementary
Billingsville Elementary	Selwyn Elementary
Biotechnology, Health and Public Administration at Olympic	Kennedy Middle
Butler High	Piney Grove Elementary
Carmel Middle	Huntingtowne Farms
Community House Middle	Albemarle Road Middle
Community of Schools of Davidson	Hornet's Nest Elementary
Cotswold Elementary	Randolph IB Middle
Druid Hills Academy	Myers Park High
Eastover Elementary	Merry Oaks Elementary
Elizabeth Lane Elementary	Thomasboro Academy
Elon Park Elementary	Steele Creek Elementary
Endhaven Elementary	Montclair Elementary
Hawk Ridge Elementary	Nations Ford Elementary
Highland Creek Elementary	Ridge Road Middle/Mallard Creek High
Hornet's Nest Elementary	Community of Schools of Davidson
Huntersville Elementary	Statesville Road Elementary
Huntingtowne Farms	Carmel Middle
Idlewild Elementary	Olde Providence Elementary
J.H. Gunn Elementary	Providence Day School
Jay M. Robinson Middle	Barringer Academic Center
Kennedy Middle	Biotechnology, Health and Public Administration at Olympic
Lake Wylie Elementary	Berewick Elementary

Partnering Schools

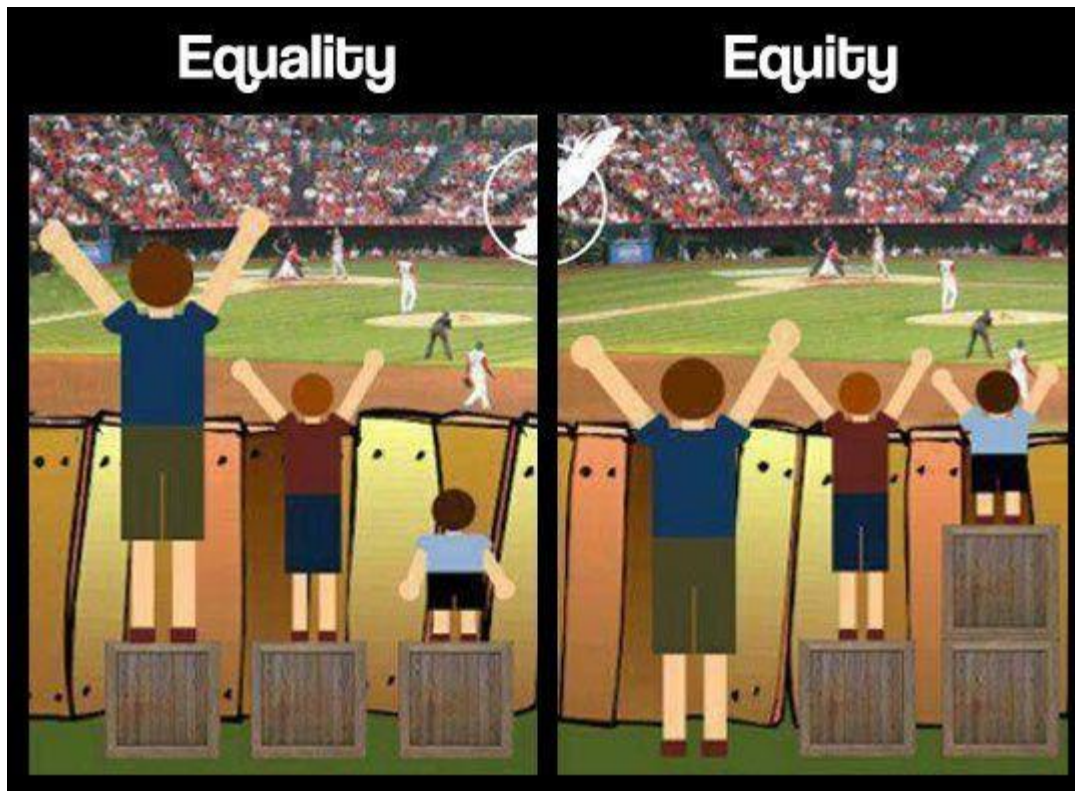
Mallard Creek High	Ridge Road Middle/ Highland Creek Elementary
McKee Road Elementary	Berryhill Elementary
Merry Oaks Elementary	Eastover Elementary
Metro School	Providence Spring Elementary
Montclair Elementary	Endhaven Elementary
Myers Park High	Druid Hills Academy
Myers Park Traditional Elementary	Reid Park Elementary
Nathaniel Alexander Elementary	Torrence Creek Elementary
Nations Ford Elementary	Hawk Ridge Elementary
NW School of the Arts	Oakdale Elementary
Oakdale Elementary	NW School of the Arts
Olde Providence Elementary	Idlewild Elementary
Providence Day School	J.H. Gunn Elementary
Park Road Montessori Elementary	Sedgefield Elementary
Pineville Elementary	Ardrey Kell High
Pinewood Elementary	Sharon Elementary
Piney Grove Elementary	Butler High
Polo Ridge Elementary	Ashley Park Pre K-8 School
Providence Spring Elementary	Metro School
Randolph IB Middle	Cotswold Elementary
Reid Park Elementary	Myers Park Traditional Elementary
Ridge Road Middle	Highland Creek Elementary/ Mallard Creek High
Sedgefield Elementary	Park Road Elementary
Sedgefield Middle	Alexander Graham Middle IB
Selwyn Elementary	Billingsville Elementary
Sharon Elementary	Pinewood Elementary
Statesville Road Elementary	Huntersville Elementary
Steele Creek Elementary	Elon Park Elementary
Sterling Elementary	Beverly Woods Elementary
Thomasboro Academy	Elizabeth Lane Elementary
Torrence Creek Elementary	Nathaniel Alexander Elementary
University Park Elementary	Ballantyne Elementary

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Fall 2011



The problem with that equity vs. equality graphic you're using

[October 29, 2016](#) [Paul Kuttner](#) [Post](#) [Equality](#), [Equity](#), [Infographics](#), [Justice](#), [Metaphors](#), [Symbols](#)

[NOTE: November 1, 2016. This post has been updated based on the new things I've learned about these images since posting the original article.]

I was doing some work for a colleague at the [Family Leadership Design Collaborative](#), and she gave me a challenge: redesign the “equity vs. equality” graphic that’s been circulating on the web. You’ve probably come across a version of this graphic yourself. There are a bunch of iterations, but basically it shows three people trying to watch a baseball game over the top of a fence. The people are different heights, so the shorter ones have a harder time seeing. I’ve included the original image above, by [Craig Froehle](#).

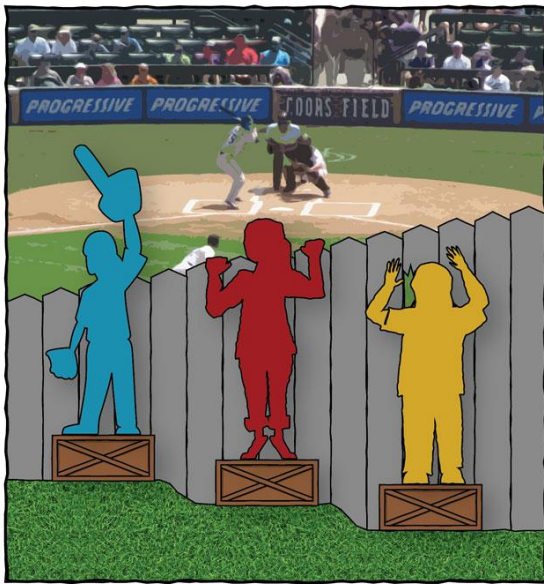
In the first of two images, all three people have one crate to stand on. In other words, there is “equality,” because everyone has the same number of crates. While this is helpful for the middle-height person, it is not enough for the shortest and superfluous for the tallest. In contrast, in the second image there is “equity” — each person has *the number of crates they need* to fully enjoy the game.

The distinction between equity and equality is an important one. For example, if we're talking about [school funding](#), advocating for equality would mean ensuring that all schools had the same amount of resources per pupil (an improvement in most cases, to be sure). On the other hand, advocating for equity would mean recognizing that some schools — like those serving students in low-income Communities of Color — will actually need more resources (funding, experienced teachers, relevant curriculum, etc.) if we are going to make a dent in the educational disparities that have come to be known as the [“achievement gap.”](#)

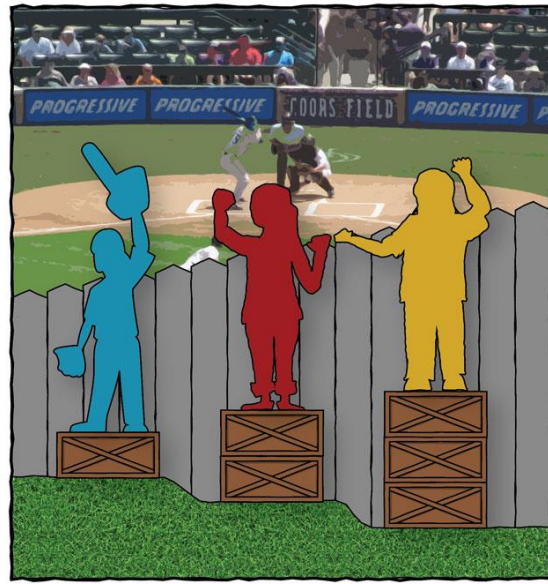
The problem with the graphic has to do with where the initial inequity is located. In the graphic, some people need more support to see over the fence because they are shorter, an issue *inherent to the people themselves*. That's fine if we're talking about height, but if this is supposed to be a metaphor for other inequities, it becomes problematic. For instance, if we return to the school funding example, this image implies that students in low-income Communities of Color and other marginalized communities need more resources in their schools because they are *inherently less academically capable*. They (or their families, or their communities) are metaphorically “shorter” and need more support. But that is not why the so-called “achievement gap” exists. As many have argued, it should actually be termed the [“opportunity gap”](#) because the problem is not in the abilities of students, but in the disparate opportunities they are afforded. It is rooted in a history of oppression, from colonization and slavery to [“separate but equal”](#) and [redlining](#). It is sustained by [systemic racism](#) and the country's ever-growing [economic inequality](#).

This metaphor is actually a great example of [deficit thinking](#) — an ideology that blames victims of oppression for their own situation. As with this image, deficit thinking makes systemic forms of racism and oppression invisible. Other images, like the one of [different animals having to climb a tree](#), or of [people picking fruit](#), suffer from the same problem. How would we make these root causes more visible in our “equity vs. equality” image?

Well, if we began with the metaphor of the fence, this would require making clear that the reason some people have more difficulty seeing than others is not because of their height, but because of the context around them. Below is a sketch of this idea. In this image, some people are standing on lower ground (a metaphor for historical oppression) and are trying to see over a higher fence, a metaphor for present-day systems of oppression. (I also put a hole in the fence, made by the person on the right, to symbolize the [creative and often subversive ways](#) that people find to work around systems and get some of what they need.)

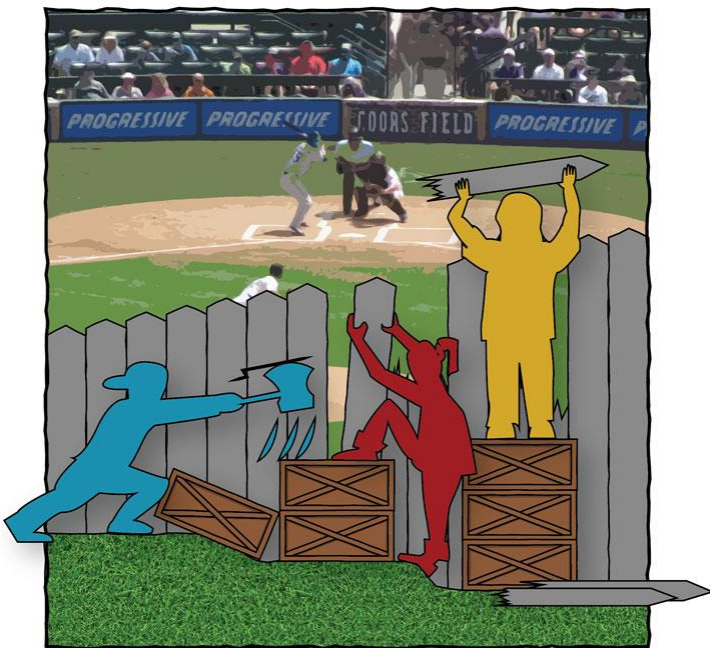


EQUALITY

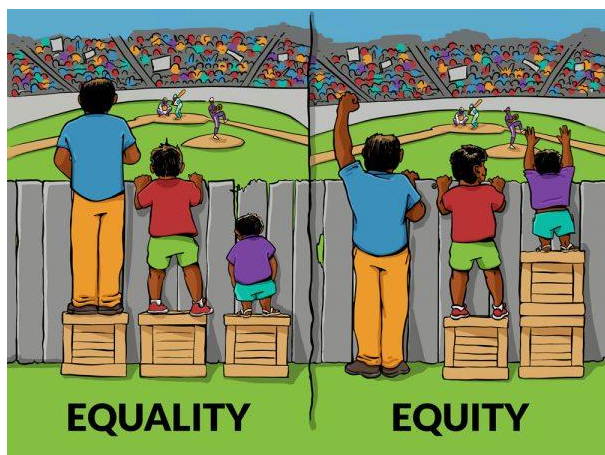


EQUITY

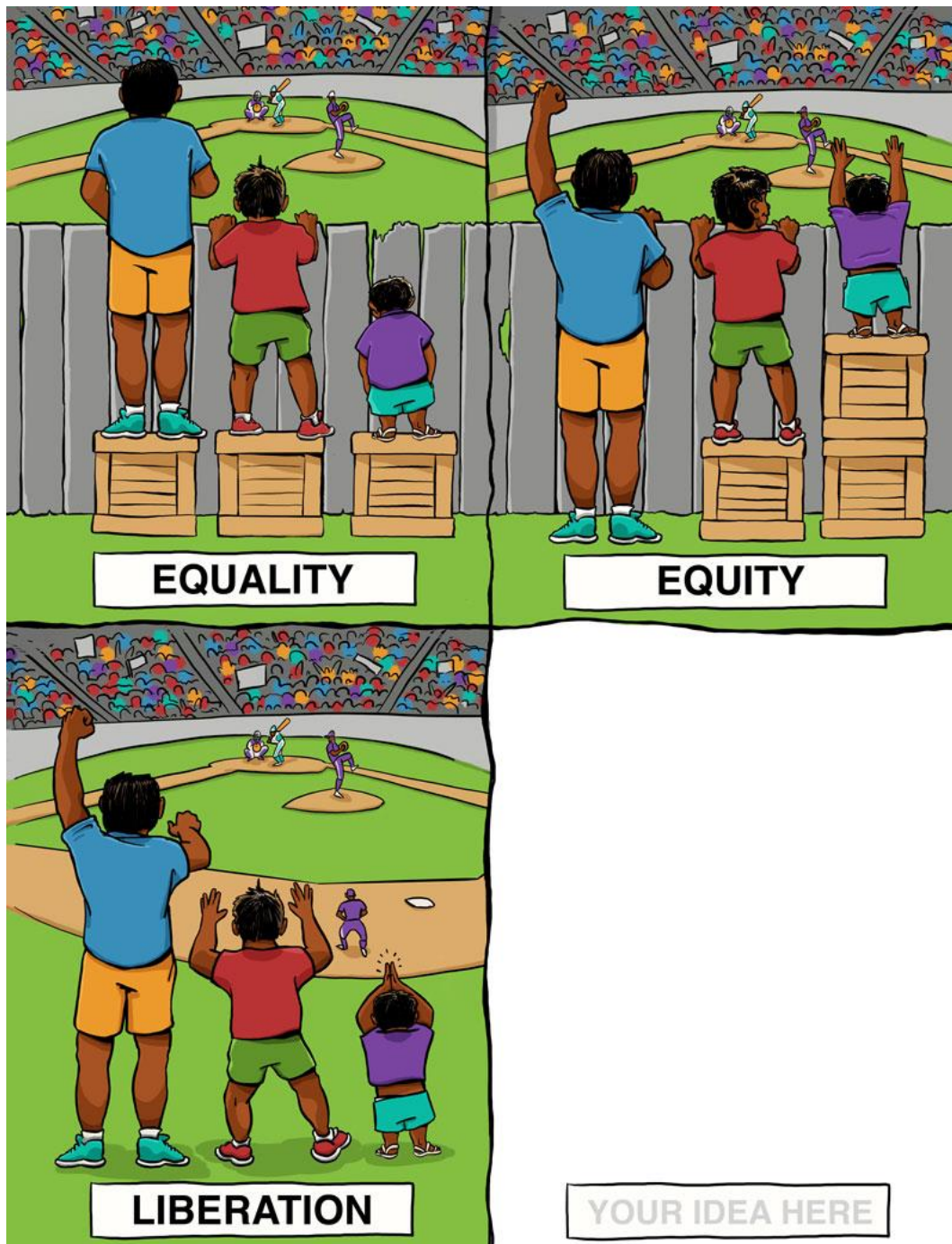
However, I still don't love this new version, because nothing is being done here to address the real problem: the fence. So I drew this third image for fun. Though by this point it's losing a lot of the original images nice simplicity.



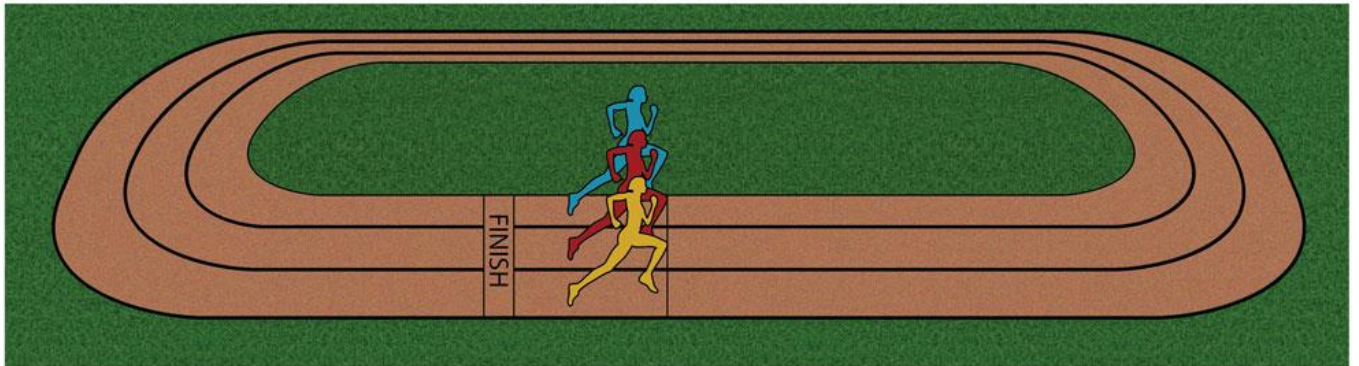
JUSTICE



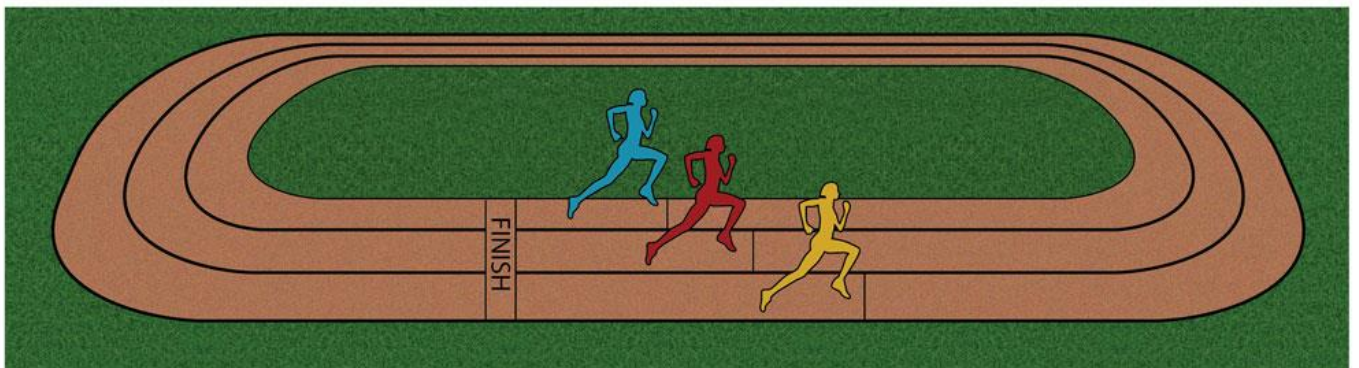
If you want to play around with this metaphor yourself, check out [the 4th Box toolkit](#). Recently, the people at the [Center for Story-Based Strategy](#) and the [Interaction Institute for Social Change](#) worked with artist [Angus Maguire](#) to recreate the fence image, producing the beautiful version to the right. It went viral, and they noticed a lot of people remixing the image to expand on the concepts. So they collaborated with Maguire again to create an adaptable visual toolbox, which makes it easy to create your own image in the “4th box” as shown below. They’ve been using it to inspire both [in-person and online dialogues](#).



I still see a lot of drawbacks to the core metaphor, however, so I've been on the lookout for others. One I've heard, which I think works better, references runners on a racetrack. On an oval track, the outer lanes are actually longer than the inner lanes. If everyone started at the same place, some would have to run farther than others. So, naturally, we start runners at different places along the track. Here's a mock-up of this metaphor, though it assumes that you already know about the different lengths of each lane:



EQUALITY



EQUITY

Beyond this, I haven't had any major breakthroughs, and the idea of life as a "race" isn't very appealing to me. Fortunately, I was not the only one trying to figure this out. [Meyer Memorial Trust](#) and [Northwest Health Foundation](#) had similar concerns, so they launched the [Equity Illustrated](#) contest, asking Oregonian artists to take up the challenge.

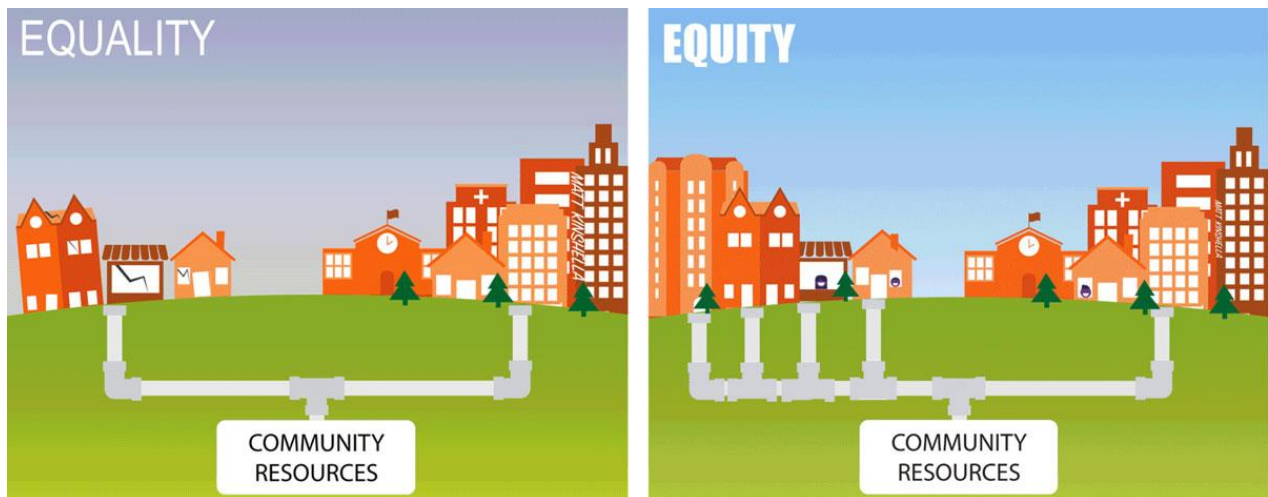
First place winner [Salomé Chimuku](#) rejected the simple metaphoric approach all together, noting that "equity isn't about watching baseball." Instead she offers [a series of cartoon portraits](#) of friends, with quotes from each illustrating a different aspect of equity. The result has the quality of a conversation. Here's a sample. You can download the whole [pdf HERE](#).

"Equity is a home. Not like a physical house
...but rather a home. Cause that's
more metaphorical to a sense of belonging and stuff,
yeah? Yeah."



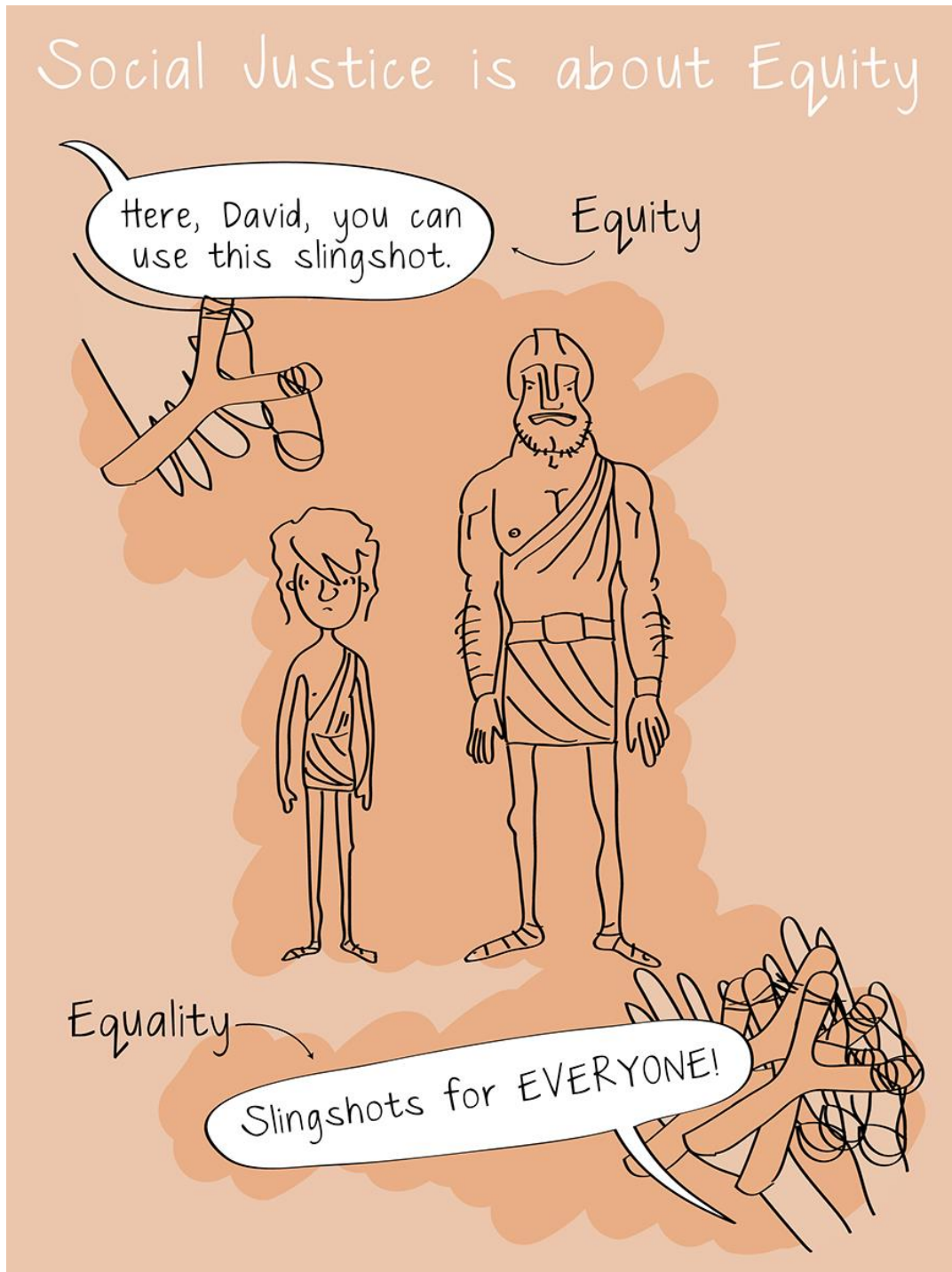
"We have to *build* towards equity. It takes both;
people using their privileges and others using
their experiences."

The third place illustration, from [Matt Kinshella](#), is also pretty great. It keeps the simplicity of the fence image, but puts aside the baseball metaphor for a more concrete example — one close to my heart as someone invested in community work.



It may seem that I am reading too much into these images. Certainly they were all created with the best of intentions. But metaphors are important. They help us understand new ideas by referencing things we already know. At the same time, they shape our experience, opening us up to some ideas while closing us off to others. The mental shorthand we use to understand “equity” will affect how we go about fighting for it.

In the spirit of keeping the conversation going, I'll end with this image from Sam Killermann, which I find pretty amusing, and which [you can buy in poster or t-shirt form](#).



What Should PTOs Pay For?



DOLGACHOV/THINKSTOCK

Tighter school budgets mean parent groups are asked to fund more and more items that used to be paid for by the administration.

by Sharron Kahn Luttrell
04/28/2015

Lauri Lewis thought she knew what to expect when she joined the PTO four years ago. She would help run bake sales, school fairs, and teacher appreciation days, right? Well, yes. But she would also raise money for hundreds of thousands of dollars' worth of equipment and capital projects. That got her wondering—what is the PTO's role, anyway? To enrich her kids' educational experience, or to enrich her kids' school?

Increasingly, parent-teacher organizations are funding items that schools say they need but can't afford. Across the country, PTOs are picking up the tab for computers, library books, even instructor salaries and classroom aides. While most agree these items should be paid for with public funds, many PTOers say they're not going to hold their breath waiting for those funds to appear.

Lewis, whose fifth- and seventh-grade children are students in the Brazosport Independent School District in Texas, was stunned her first year on the PTO when the parent group funded a new phonics curriculum. "I was like, 'What does the school provide?' " she says.

Since then, Lewis has watched the district's PTOs pay for a new elementary school track, 20 computers with wireless Internet, a computer lab, an outdoor pavilion for physical education classes, maps, an atomic clock, and library books for the middle school.

Earlier this school year, Lewis headed up the annual Rasco Middle School PTO fundraising drive, which brought in \$50,000 through gift-wrap and candy sales. "It sounds absurd, but we almost had trouble spending the money. A teacher could have asked for almost anything," Lewis says. "The schools that my kids go to are better equipped because of the PTO. I think the school board knows the PTO will come through."

And therein lies a problem, according to National PTA President Shirley Igo. While it's understandable—indeed commendable—that parents want to provide big-ticket items for their children's school, it's unfair to do so, she says. Private funds tip the balance of equity in public schools, with students in wealthier communities likely to end up with more than their peers in less well-off districts. "When some schools are able to raise additional funds from outside sources, while other schools are not, we develop a multi-tiered education system that places many of our children at a great disadvantage," Igo explains. "No child's education should depend on where he lives, his socioeconomic condition, or the ability of his community to add to his school's resources."

Others disagree, arguing that providing the best resources for their children can't be a bad thing.

A Budget Band-Aid?

Private donations to public schools are not new phenomena, although lately, parent groups have edged into a more central funding role, largely because of budget cuts. Many states have adopted tax limitation measures, restricting the amount of money a community can raise for services like education. And with only 20 percent of American families having children in public school, support for increased education funding has fallen off, said S. Paul Reville, who is on the faculty of the Harvard School of Education and is co-director of Harvard's Pew Forum on Standards-Based Reform.

Yet, from the prairie town pioneers who pooled their money to hire a schoolteacher, to the gifts of water fountains and ornamental trees that senior classes buy their schools each year, beneficiaries of public education have felt compelled to give something back. Add to that impulse dwindling public education dollars and the specter of a beloved child doing without, and you get someone like Kevin D. Green Sr., who pounded the pavement in Jackson, Mississippi, to collect donations for the annual PTA raffle. Green, president of the Boyd Elementary School Parent Teacher Association, realized his third-grader would be on to middle school before Boyd got the "computer in every classroom" that the governor has vowed for the state's schools.

So, with the same spirit that drives him to purchase Kleenex, soap, and other essentials for his son's classroom, Green and the PTA set out to buy computers for the school. The raffle brought in \$20,000—a high for the Boyd PTA—and 11 new computers are expected to arrive any day.

"The PTA has given us a boost in getting up to date," says Frederick Murray, principal of grades three through five in the 800-student Boyd school. Murray says the PTA's generosity has allowed him to use district funds to reduce class sizes by hiring more teachers.

The children at Boyd do not come from wealthy families; more than 95 percent are eligible for free or reduced lunch. The \$20,000 was hard-earned, through the students' salesmanship and the community's support. But some worry that one-time or annual fundraisers like this are a Band-Aid that covers the need for long-term, strategic funding and could lull school boards into ignoring chronic budget shortfalls. As well-meaning and helpful as private donations are, there will never be enough to pay for everything, says Wendy D. Puriefoy, president of the Public Education Network (PEN), a national association of local education funds in Washington, DC. According to Harvard's Reville, if the nation's total charitable foundation dollars replaced public funding of education, America's schools could survive for two to three days before plunging into bankruptcy. "People are trying to solve a big public problem with private money, and it just doesn't work in the long run," says Puriefoy.

The community's enthusiasm for equipping schools should be redirected toward advocating for increased public funding, Puriefoy says. Not only do public dollars reflect the public's priorities, but they also ensure consistency that most PTOs can't, she explains. The Rasco Middle School PTO has no long-term strategy because the school serves only two grades. The entire PTO changes over every few years. "There's no long-range plan," Lewis says. "Every couple of years, a new group of parents shows up and says, 'OK. How can we spend this money?' "

Puriefoy's advice is, "As a PTO, ask yourself the larger question: 'What happens after my kids are gone?' If something is going to have an impact, it has to be structured, regular, systematic."

Parents as Philanthropists

The Gates Elementary School in Acton, Massachusetts, seems not to suffer from continuity issues. The school, which serves 508 students in grades K–6, has a PTO that has paid for a Spanish instructor for the last nine or 10 years. It also funds 39 hours per week of classroom assistants. Interim Principal Walter McGrail explains that the PTO has a sort of succession plan, where the co-chair serves with the chair for a time before taking over the helm. This ensures an uninterrupted link with the past. The PTO has avoided running afoul of the teachers' union by limiting its support to part-time, noncertified positions.

While the Gates PTO has apparently worked out a conflict-free way to fund personnel, there are districts that are so concerned with the potential for problems that they have clear rules about what sort of help they will accept from parents. The Newton, Massachusetts, public schools have an "equity cap," which limits the amount of money parent groups can donate for certain items. Technology was removed from the cap when budgets got tight, so last year the Mason Rice elementary school parent group launched a capital campaign after realizing that, of the city's 15 elementary schools, its was among the most poorly equipped. Through letters, information nights, and coffees, the PTO raised \$70,000 to buy computers and audio-visual equipment. This year, some of the city's other PTOs tried to organize similar fundraisers, bringing inequity concerns back to the surface and sparking a movement to put technology back under the equity cap.

"We're at loggerheads," says Mason Rice PTO Co-Chair Kathy Berman. "But the point is good. I don't support PTOs taking this on." Berman says the citywide PTO council has been meeting to work out the issue, and she hopes its members can figure out a way to make sure every school is equipped at the same level.

MORE ON BYLAWS/NONPROFIT

[Record-Retention Rules for PTOs \(/filesharing/document/1030-pt0-record-retention-rules\)](#)

[Get Organized and Apply for Nonprofit Status. Step by Step \(/startup-guide\)](#)

When Paul Houston was superintendent of the Princeton, New Jersey, public schools, he had a policy limiting parent support to nonessential activities, such as enrichment. Still, Houston, now executive director of the National Association of School Administrators, says he's glad he wasn't on the receiving end of an offer that a California rock star once told him about. The man (whose name Houston, out of courtesy, won't reveal) was unhappy with what he felt was the unhealthy food his child's public school cafeteria served. The musician offered to hire a macrobiotic chef. When the superintendent told him that wouldn't be fair to the other schools in the district, he offered to give a benefit concert to pay for macrobiotic chefs for each of the schools.

"If I were the superintendent, I don't know what I would've done in that situation," Houston says, then adds that he probably would have encouraged the parent to lobby the school board to allocate more funds toward healthier school meals.

That's the advice Puriefoy has. And while parents like former Mason Rice PTO Co-Chair Bonnie Ciambotti agree that's the best route, they're acutely aware of the clock ticking on their children's public school years. By the time they work their requests up through the bureaucratic layers, chances are their kids will be on to another school. "Our computers were so old and slow. The teachers were so frustrated, they could barely even use them," Ciambotti says. "We knew if we waited for the school department to fund the computers, we just wouldn't get them."

Whether or not it's in society's best interest to have parents acting as private philanthropists, one thing's for certain: They're not going to stop anytime soon. Dire needs and enthusiastic parents make for a potent mixture.

"The issue has been around for a long time, and it ebbs and flows with the economy," Houston says. "I think this will be coming up more often now."

The PTO Today Take

It's an age-old question: Where should we draw the line between a school or district's financial responsibilities and the fundraising role of a parent group? Like the bumper sticker says, "It will be a great day when our schools get all the money they need and the Air Force has to hold a bake sale to buy a bomber."

While we agree with that sentiment, the reality is that parent groups across the country are playing a key role in providing valuable extras for children—more than \$2 billion worth of playgrounds and computers and field trips per year, at last count. That can't be a bad thing.

The most effective parent groups can aim for success in both areas. By reaching out and engaging your entire community in the education cause, you'll make strides toward increased district-level funding and equality, and—as a nice side benefit—your next fundraiser will be even more successful. It doesn't have to be

an either-or proposition.

Why can't we have fully funded schools and enthusiastic parent groups providing even more? Now that's a goal to strive for.

The I's Have It

When S. Paul Reville was executive director of the Alliance for Education in Worcester, Massachusetts, he helped spearhead a \$4.5 million tax override for the schools. Convincing taxpayers to support local education in a blue-collar city of 170,000 was the result of a long-term campaign of public engagement.

Reville says the PTO is a natural body to advocate for a higher level of school funding. He recommended parents embark on a basic "three I's" marketing strategy of gaining the community's interest, involvement, and investment in the schools.

Interest community members in the issues your school is facing by helping them make the connection between the community's vitality and the health of the schools. According to a recent survey by the Public Education Network and Education Week, most Americans agree that the nation's success depends on a well-educated citizenry.

Involve people in the schools with special programs and volunteer opportunities. Reville's organization invited local policy makers into the schools to be principal for a day. Other ideas include recruiting senior citizen volunteers and hosting community reading days, during which local dignitaries and others visit classrooms as guest readers.

When people feel a sense of ownership in the public schools, they'll be more likely to invest their time and tax dollars in education.

"It's a different way for the PTO to think of its mission," Reville says. "What you really should be about is getting critical people in your community interested in making a financial commitment."

Before embarking on the three I's, the PTO must educate itself about the issues its school faces.

Questions to ask are: What are the system's learning goals for the children? Are those goals being met? If not, how will they be met? Does the budget reflect these goals? What resources do we have?

"PTOs need to say, 'The work we have to do is to help citizens understand the relationship the schools have to the quality of life,' " says Wendy Puriefoy, president of the Public Education Network. "Generally people know more about buying a car than they do about the way their child's school system works."

The best PTO advice, ideas, and inspiration delivered weekly. Don't miss it!

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Corvallis
SCHOOL DISTRICT

VII.B. Facilities and Transportation Department Spotlight



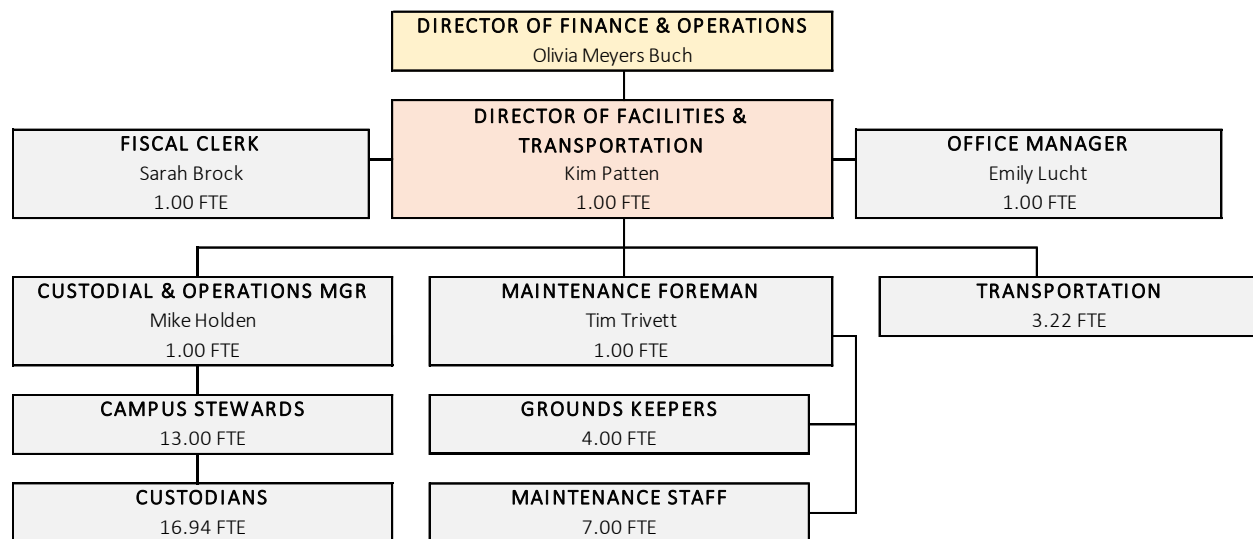
Corvallis

SCHOOL DISTRICT

Prepared for: Corvallis School Board
Prepared by: Olivia Meyers Buch, Director of Finance and Operations
Kim Patten, Director of Facilities and Transportation
Meeting Date: September 14, 2017

Facilities and Transportation Spotlight

NO ACTION REQUIRED



Facilities and Maintenance

The district is committed to providing well-maintained schools and a safe environment that enhances our students' educational experience. Facilities and maintenance staff maintain 13 school locations, the district office, and Western View Center. **All together, these 15 locations comprise nearly 1.2 million square feet on 244 acres.**

Areas of responsibility within the department include building and grounds maintenance, custodial operations, management of community use requests, and long range planning and facilities management. **The 2017-18 budget for facilities and maintenance totals \$6.999 million** as follows:

Function 2540 – Operation and Maintenance of Plant Services	2017-18 Adopted Budget	2017-18 Budgeted FTE
100 - Salaries	\$2,048,605	45.4375
200 – Associated Payroll Costs	1,321,547	-
300 – Purchased Services	2,479,315	-
400 – Supplies and Materials	412,402	-
500 – Capital Outlay	35,000	-

600 – Other Objects	702,800	
Total	\$6,999,699	45.4375

The annual budget includes \$250,000 for department direction and support staff and supplies; \$2.631 million for custodial staff and supplies; \$421,000 for grounds keeping staff and supplies; \$1.547 million for maintenance staff and supplies; \$1.453 million for utilities (electricity, natural gas, water, sewer, and garbage services); and \$700,000 for property insurance premiums,

Major projects completed last in the last 12 months include the repainting of Franklin K-8 School, boiler replacements at Corvallis High School, interior renovations at the Harding Center, and the addition of a modular structure at the Harding Center to accommodate growth in the WINGS program.

Student Transportation

The district is responsible for transporting students to and from school and school-related functions in a safe and orderly manner. To achieve this goal, the district contracts with First Student, Inc. to provide transportation services including bus service to and from school, daily shuttles between the two high schools, field trips, athletic activities, and other school-related events. **Last year the district transported 2,120 students to and from school 662,228 miles on 43 different routes.**

The district is required to ensure that First Student complies with all applicable laws and administrative rules. District staff provide contract oversight, transportation coordination for students and families, and student support on buses during route times. **The 2017-18 budget for student transportation services totals \$3.439 million** as follows:

Function 2550 – Student Transportation Services	2017-18 Adopted Budget	2017-18 Budgeted FTE
100 - Salaries	\$ 136,215	3.7188
200 – Associated Payroll Costs	92,191	-
300 – Purchased Services	3,162,600	-
400 – Supplies and Materials	8,000	-
500 – Capital Outlay	40,000	-
Total	\$3,439,006	3.7188

Through the State School Fund distribution formula, the district receives a transportation grant totaling 70% of approved transportation costs. Approved costs are those attributable to transporting students from home to school (if over 1 mile from elementary school or 1.5 miles from high school), between schools, on field trips and for other reasons in special cases.



Corvallis
SCHOOL DISTRICT

VIII. BOARD AND SUPERINTENDENT WORKING AGREEMENTS



Corvallis

SCHOOL DISTRICT

Prepared for: Corvallis School Board

Prepared by: Vincent Adams, School Board Chair, and Ryan Noss, Superintendent

Meeting Date: September 14, 2017

Board and Superintendent Working Agreements

ACTION REQUESTED

Background

At its August 17, 2017, meeting, the board received training from the Oregon School Boards Association (OSBA), regarding basic roles and responsibilities for Oregon school board members.

One of the elements of the training was reviewing a menu of options for board and superintendent working agreements. Board members spent time in small groups reviewing and then sharing out their choices from the options OSBA provided for the board's expectations of the superintendent. Similarly, Superintendent Noss reviewed and shared out his choices for the superintendent's expectations of the board.

Following that training, Board Chair Vincent Adams and Superintendent Ryan Noss met to review the language recommendations and crafted a proposal for 2017-18 Board and Superintendent Working Agreements. The proposal is attached.

ACTION REQUESTED:

Adopt the 2017-18 Board and Superintendent Working Agreements.

MOTION REQUESTED:

"I move to adopt the 2017-18 Board and Superintendent Working Agreements."



Corvallis

SCHOOL DISTRICT

BOARD AND SUPERINTENDENT WORKING AGREEMENTS 2017-2018

A. Purpose of Agreements

The Board of Directors is the policy making body for the School District. To effectively meet the District's challenges, the School Board and Superintendent must function together as a leadership team. To ensure accord among team members, effective group agreements must be in place. The following are the group agreements for the Board and Superintendent.

B. Board Job Description and Relationship with the Superintendent

1. Operate as representatives and make decisions in the best interest of the whole District
2. Set the long-term direction of the District.
3. Focus on policymaking and planning.
4. Assist in gaining acceptance and support in the community.
5. Understand that as an individual, a Board member has no authority. It is when acting through a majority that the Board has influence.
6. Be accountable for the financial stewardship of the District, including aligning resources with goals and priorities, setting expectations, and monitoring progress.
7. Make an effort to foster unity, harmony and open communications within the board.
8. Insist on all available facts and data before making a decision.
9. Supervise the hiring, performance evaluation, and other personnel management processes related to the Superintendent.
10. Work with the Superintendent as a team, recognizing that the Superintendent is the Board's advisor.
11. Acknowledge and follow the chain of command of the school district.

C. Role of Board Leadership

1. Manage the Board's processes; convene meetings; develop the Board agenda with the Superintendent, seeking Board member input; and execute documents, as appropriate.
2. Serve as the authorized spokesperson for the Board with regard to Board policy, process, and decisions. The Chair may delegate this responsibility to other Board members and/or the Superintendent.

3. Communicate with individual Board members concerns shared by other board members regarding issues agreed to in the working agreements or group operating norms.
4. Assist the Superintendent in communicating important information to the full Board. Keep Board members apprised of information exchanged with the Superintendent.
5. Set priorities for Board professional development annually.
6. The Vice Chair will perform these duties when the Chair is not available.

D. Role of the Superintendent

1. Work toward becoming a team with board members.
2. Work with the board to establish a clear vision for the District through preparation of annual goals for the board's consideration.
3. Provide data to board members so that data-driven decisions can be made.
4. Communicate with board members promptly and effectively by informing the board of all critical information including relevant trends, anticipated adverse media coverage, or critical external or internal change.

E. Board Requests Regarding Staff Presentations

1. To facilitate adequate Board preparation for meetings, staff reports and presentations should be distributed as part of the Board packet prior to the meeting. Avoid sending additional reports to the Board after packets have been disseminated.
2. Develop a system to provide updates regarding the work of District committees.
3. Limit staff reports to introductory and additional remarks; avoid restatement of written reports or PowerPoint presentations.
4. Keep staff presentations succinct.
5. Utilize the practice of avoiding surprise items at board meetings.

F. Communication

1. When the Board receives communication from the community, the chair will respond or will delegate that responsibility to another Board member. A "footnote" statement will be added to the bottom of the board chair's email so that patrons understand that it is the practice of the Board that the chair will be responding on behalf of the board.

The footnote will state, "The Board Chair responds to emails sent to the full board. School board members only deliberate when gathered as a quorum as outlined in the Public Meeting Law. To assure that board conversations and deliberations do not occur on email, the Board Chair will respond on behalf of the Board. All Board

members receive communications that come from the community and the response given by the Board Chair."

All Board members will be included in responses made by the Board chair.

Following the communication from the Board chair, other Board members may also respond if they wish.

2. When a single Board member receives a communication from a member of the public, s/he may respond to that patron as an individual. The Board member may elect to forward the email and his/her response to the Board Chair or full Board if he/she wishes.
3. Responses to community communications should occur within 36-72 hours of receipt of the communication. The chair will delegate if s/he is unable to meet this timeframe.
4. When a concern or problem arises, communicate one-on-one with the Board member. If the issue is not resolved, communicate with the Board chair and finally with the Superintendent if necessary.



Corvallis

SCHOOL DISTRICT

BOARD AND SUPERINTENDENT WORKING AGREEMENTS

2017-2018

(Adopted 09-14-17)

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2. Working with the Superintendent, set the long-term direction of the District through the mission, vision, goals, and priorities.
3. Focus on policymaking and planning.
4. Assist in gaining acceptance and support in the community.
5. Understand that as an individual, a Board member has no authority. It is when acting through a majority that the Board has influence.
6. Be accountable for the financial stewardship of the District, including aligning resources with goals and priorities, setting expectations, and monitoring progress.
7. Make an effort to foster unity, harmony and open communications within the board.
8. Insist on all relevant facts and data before making a decision.
9. Supervise the hiring, performance evaluation, and other personnel management processes related to the Superintendent.
10. Work with the Superintendent as a team, recognizing that the Superintendent is the Board's advisor.
11. Respect the Superintendent's responsibility to manage the day-to-day operations of the District and to direct employees in District and school matters.

C. Role of Board Leadership

1. Manage the Board's processes; convene meetings; develop the Board agenda with the Superintendent, seeking Board member input; and execute documents, as appropriate.

2. Serve as the authorized spokesperson for the Board with regard to Board policy, process, and decisions. The Chair may delegate this responsibility to other Board members and/or the Superintendent.
3. Communicate with individual Board members any concerns shared by other board members regarding issues agreed to in the working agreements or group operating norms.
4. Assist the Superintendent in communicating important information to the full Board. Keep Board members apprised of information exchanged with the Superintendent.
5. Set priorities for Board professional development annually.
6. The Vice Chair will perform these duties when the Chair is not available.

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F. Communication

1. When the Board receives communication from the community, the chair will respond or will delegate that responsibility to another Board member. A "footnote" statement will be added to the bottom of the board chair's email. The footnote will state, *"The Board Chair responds to emails sent to the full board. School board members only deliberate when gathered as a quorum as outlined in the Public Meeting Law. To assure that board conversations and deliberations do not occur on email, the*

Board Chair will respond on behalf of the Board. All Board members receive communications that come from the community and the response given by the Board Chair."

All Board members will be included in responses made by the Board chair.

Following the communication from the Board chair, other Board members may also respond if they wish.

2. When a single Board member receives a communication from a member of the public, s/he may respond to that patron as an individual. The Board member may elect to forward the email and his/her response to the Board Chair or full Board if he/she wishes.
3. Responses to community communications should occur within 36-72 hours of receipt of the communication. The chair will delegate if s/he is unable to meet this timeframe.
4. When a concern or problem arises, communicate one-on-one with the Board member. If the issue is not resolved, communicate with the Board chair and finally with the Superintendent if necessary.



Corvallis

SCHOOL DISTRICT

IX. CONSOLIDATED ACTION

IX.A. Minutes

IX.A.1. August 17, 2017

MINUTES
Business Meeting of the
BOARD OF DIRECTORS
Corvallis School District 509J

I. CALL TO ORDER AND ROLL CALL

The meeting was called to order at 5:20 p.m. in the Board Room of the Central Administration Building, 1555 SW 35th Street, Corvallis, OR 97333. The secretary recorded those present as listed below.

<u>BOARD MEMBERS PRESENT</u> Vincent Adams, Chair Sami Al-AbdRabbuh, Vice Chair Judy Ball Jay Conroy Terese Jones Ed Junkins Sarah Finger McDonald	<u>EXECUTIVE STAFF PRESENT</u> Ryan Noss, Superintendent Kevin Bogatin, Assistant Superintendent Jennifer Duvall, Human Resources Director Olivia Meyers Buch, Finance and Operations Director
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A quorum was present and due notice had been published.

II. PLEDGE OF ALLEGIANCE

Chair Adams led the Pledge of Allegiance.

III. CONSOLIDATED ACTION

MOTION:

It was moved by Director Ball and seconded by Director Finger McDonald to approve the Consolidated Action items. The motion was voted on and unanimously approved.

The following items were approved:

- A. Licensed Personnel Recommendations** – (This document will be filed with the official 2017-18 board minutes.)
- B. Minutes** – June 19, 2017; July 10, 2017; July 17, 2017

IV. CONSOLIDATED INFORMATION

The board received the following information:

- A. Non-Licensed Personnel Information** – (This document will be filed with the official 2017-18 board minutes.)

V. TRAINING BY OREGON SCHOOL BOARDS ASSOCIATION

Kristen Miles, Board Development Specialist with Oregon School Boards Association (OSBA), provided training on basic roles and responsibilities for Oregon school board members.

One of the elements of the training was reviewing a menu of options for board and superintendent working agreements. Board members spent time in small groups reviewing and then sharing out their choices from the options OSBA provided for the board's expectations of the superintendent. Those were discussed by the full board to refine the selections and the wording. Similarly, Superintendent Noss reviewed and shared out his choices for the superintendent's expectations of the board. A draft of proposed Board and Superintendent Working Agreements will be brought to the board for action at a later date.

VI. ADJOURNMENT

There being no further business before the Board, Chair Adams adjourned the meeting at 8:29 p.m.

Vincent Adams, Board Chair

Ryan Noss, Superintendent

Prepared By: Julie Catala

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Corvallis

SCHOOL DISTRICT

IX.A.2. August 22, 2107

MINUTES
Retreat of the
BOARD OF DIRECTORS
Corvallis School District 509J

I. CALL TO ORDER AND ROLL CALL

The meeting was called to order at 8:00 a.m. in Dennis Hall of First Presbyterian Church, 114 SW 8th Street, Corvallis OR 97333. The secretary recorded those present as listed below.

<u>BOARD MEMBERS PRESENT</u>	<u>STAFF PRESENT</u>
Vincent Adams, Chair	Ryan Noss, Superintendent
Sami Al-AbdRabbuh, Vice Chair	Kevin Bogatin, Assistant Superintendent
Judy Ball	Olivia Meyers Buch, Finance and Operations Director
Jay Conroy	Jennifer Duvall, Human Resources Director
Terese Jones	Laurie Corliss, Assessment/Data Specialist
Ed Junkins	Brenda Downum, Communications Coordinator
Sarah Finger McDonald	Rynda Gregory, Teaching and Learning Coordinator
	Lynne Griffin, Asst. Coordinator Special Ed. Compliance
	Brikena Haxhiraj, Asst. Coordinator Special Ed. Compliance
	Amy Lesan, Teaching and Learning Coordinator
	Marcianne Rivero Koetje, Equity and ELL Coordinator

A quorum was present and due notice had been published.

II. GOAL SETTING

A. Introductions

Superintendent Noss welcomed the group and set the stage for the retreat. He then introduced Nancy Golden, facilitator of the retreat. Board members and staff introduced themselves and shared the strengths they bring to the table as well as their dreams for Corvallis students. Consultant Nancy Golden provided her background and her prior experience with goal setting.

B. Celebrating Our Successes

Board members and staff offered their insights as to key successes and the obstacles the board has overcome. They shared what they are personally most proud of regarding board accomplishments.

C. Superintendent and Staff Sharing Important Information

Staff gave a presentation regarding student achievement data, student and family perception data, and other pertinent information. The presentation will be filed with the official 2017-18 board minutes).

D. Vision of What The District Will Look Like When The Goals Are Complete

Board members took turns offering their vision for the district.

E. Determine A Reasonable Number Of 3-5 Year Goals

Attendees broke into small groups and brainstormed lists of possible goals based on data and other useful information, which they shared out. The full group discussed priorities.

F. Create SMART Goals

Ms. Golden explained that SMART goals are:

- **S** – specific, significant, stretching
- **M** – measurable, meaningful, motivational
- **A** – agreed upon, attainable, achievable, acceptable, action-oriented
- **R** – realistic, relevant, reasonable, rewarding results-oriented
- **T** – time-based, time-bound, timely, tangible, trackable

Board and staff spent time discussing the possible goals generated by the small groups and landed on five broad goal areas:

- All students participate in real-world, global perspective learning that prepares them for an uncertain future.
- Create a culture of health and wellness through a multi-tiered system for staff and students in the district within five years. This will be measured through surveys, reduction of reported behaviors, increased attendance, and observational data, among other validated strategies.
- Transform aging school facilities to provide more innovative and equitable learning opportunities for all students.
- Embrace equity in all our work in order that educational outcomes are not determined by race, ethnicity, national origin, language, special education, sex, socioeconomic status, and mobility.
- All students show academic growth and graduate.

G. Strengths, Obstacles & How To Overcome Obstacles For Each Goal

Board and staff discussed strengths and obstacles for the goals, and ways to overcome the obstacles.

Staff will flesh out specific strategies, activities, evidence, and performance indicators for each goal; that information will be brought back to the board for discussion and action in subsequent meetings.

H. Debrief

Attendees shared their feedback and reflections regarding the retreat. Some of the comments made by board members included:

- I'm concerned about the literal quantity of work we are imposing on staff.
- It's satisfying to have seen equity reflected in all of today's discussions.
- We need to ground ourselves to the data and what we will be able to do.
- The data was fantastic but it was the first time we'd seen it and we jumped into the weeds; in the future, give us some of the data up front.
- I'd like to be clearer about next steps, and to communicate them outward.

Some of the comments made by staff members included:

- I look forward to dovetailing the work done today and the work we've already done through the equity transformational plan.
- I appreciated the board's discussion but recommend caution against inadvertently sending a message to all staff that there are new directions and initiatives.
- I appreciate that the board is focused on this work because we will be having discussion about resource allocation; I'm hoping all of this can be finalized in time to incorporate into our budget process.

III. ADJOURNMENT

There being no further business before the Board, Chair Adams adjourned the meeting at 5:09 p.m.

Vincent Adams, Board Chair

Ryan Noss, Superintendent

Prepared By: Julie Catala

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Corvallis
SCHOOL DISTRICT

IX.B. Licensed Personnel Recommendations



Corvallis

SCHOOL DISTRICT

Prepared for: Corvallis School Board
Prepared by: Jennifer Duvall, Human Resources Director
Meeting Date: September 14, 2017

Licensed Personnel Action

ACTION REQUESTED

1. Issue:

a. Recommendation to Hire

Annette Lindenfeld: ELL/Leadership Teacher, 1.0 FTE, Linus Pauling Middle School, effective August 29, 2017 (Temporary)

Catherine Corkery: Physical Education Teacher, 1.0 FTE, Linus Pauling Middle School, effective August 29, 2017 (Probationary)

Katie Wilson: Second Grade Teacher, 1.0 FTE, Hoover Elementary School, effective August 29, 2017 (Temporary)

Sharyn Abbes: Special Education Teacher, 1.0 FTE, Garfield Elementary School, effective August 29, 2017 (Probationary)

Tony Mosley: Counselor, 1.0 FTE, Harding Center, effective August 29, 2017 (Probationary)

Alex Mowery: Language Arts & Physical Education Teacher, 1.0 FTE, Cheldelin Middle School, effective August 29, 2017 (Temporary)

Maria Simmons: ELL/Leadership Teacher, 1.0 FTE, Linus Pauling Middle School, effective August 29, 2017 (Temporary)

Delila Donaldson: Music Teacher, 1.0 FTE, Mt. View Elementary School, effective August 29, 2017 (Temporary)

Cathleen Oefelein: Fourth Grade Teacher, 1.0 FTE, Wilson Elementary School, effective August 29, 2017 (Temporary)

b. For Your Information

Mary Devine: Physical Therapist, 1.0 FTE, District Office, effective September 30, 2017 (Non-Representative Retirement). She will finish out the 2017-18 school year.



Corvallis
SCHOOL DISTRICT

MOTION REQUESTED:

“I move to approve the Licensed Personnel action as submitted.”



Corvallis
SCHOOL DISTRICT

IX.C. Declare Vacancies on the Budget Committee



Corvallis

SCHOOL DISTRICT

Prepared for: Corvallis School Board
Prepared by: Olivia Meyers Buch, Finance and Operations Director
Meeting Date: September 14, 2017

Budget Committee Vacancies

ACTION REQUESTED

Background

Pursuant to Board Policy DBEA, "Budget Committee," the Board will identify vacant budget committee positions that must be filled by appointment of the Board prior to October 1 each year.

The Budget Committee has 14 members: seven elected school board members and seven citizens appointed to three-year terms by the board. The citizen members are appointed by open vote of the School Board, as openings occur.

This year the terms of two members expired: LeeAnn Baker and Rick Osborn. Additionally, Therese Jones was appointed to serve on the school board. Therefore, there are currently two vacancies for full terms (three years each) expiring June 30, 2020, and one partial term extending to June 30, 2018.

The openings on the Budget Committee will be advertised in the Gazette Times and messages will be shared on social media and other district communication channels.

The recruitment schedule for these three open seats is proposed as follows:

- September 14 School Board Meeting – publicly identify vacant committee positions and approve recruitment calendar
- Mid-September to mid-October –advertisements, press release, social media promotions
- Monday, October 16 – application deadline
- October 17-November 3 – finance workgroup reviews applications
- November 10 - finance director recommends appointments
- November 16 School Board Meeting – appoint members

Involvement

Finance and Operations Department staff.

Cost Impact

There is no cost.

ACTION REQUESTED:

Identify these vacancies and adopt this recruitment schedule.

MOTION REQUESTED:

"I move that the Board identify three full-term openings on the 2018 Budget Committee and approve the 2017-18 recruitment schedule as presented by staff."



Corvallis

SCHOOL DISTRICT

X. CONSOLIDATED INFORMATION

X.A. Non-Licensed Personnel Information



Corvallis

SCHOOL DISTRICT

Prepared for: Corvallis School Board
Prepared by: Jennifer Duvall, Human Resources Director
Meeting Date: September 14, 2017

Non-licensed Personnel Information

NO ACTION REQUIRED

Recommendation to Hire

Kendra Callahan: Educational Assistant 2, 5.5 hrs, Mt. View Elementary, effective September 6, 2017 (Regular/Probationary)

Rebekah Titus: Educational Assistant 2, 4 hrs, Mt. View Elementary, effective September 6, 2017 (Regular/Probationary)

Stephanie Rose: Educational Assistant 2, 6.50 hrs, Corvallis High School, effective September 6, 2017 (Regular/Probationary)

Nora LePage: Educational Assistant 2, 4.5 hrs, Mt. View Elementary, effective September 6, 2017 (Regular/Probationary)

Heather Fenske: Educational Assistant 2, 7.50 hrs, Corvallis High School, effective August 29, 2017 (Regular/Probationary)

Elizabeth Street: Educational Assistant, 6 hrs, Lincoln Elementary, effective September 5, 2017 (Limited Term)

Ashley Maxwell: Educational Assistant, 7 hrs, Cheldelin Middle School, effective September 6, 2017 (Regular/Probationary)

Sandra De Carolis: Educational Assistant 2, 4 hrs, Hoover Elementary, effective September 5, 2017 (Regular/Probationary)

Nathan Wheeler: Educational Assistant Life Skills, 7 hrs, Jefferson Elementary, effective September 6, 2017 (Limited Term)

Tara Cree: Educational Assistant 2, 6.5 hrs, Franklin Elementary, effective September 6, 2017 (Regular/Probationary)

Keenan Beil: Educational Assistant 2, 6.5 hrs, Cheldelin Middle School, effective August 29, 2017 (Limited Term)

Juliette Mulholland: Educational Assistant 2, 4 hrs, Adams Elementary, effective August 29, 2017 (Limited Term)



Corvallis

SCHOOL DISTRICT

Maya Suchaneck: Educational Assistant Life Skills, 7 hrs, Corvallis High School, effective August 29, 2017 (Regular/Probationary)

Barbara Rebuhn: Educational Assistant 2, 5 hrs, Lincoln Elementary, effective August 29, 2017 (Regular/Probationary)

Zulema Mendoza: Administrative Assistant 1-Elementary Office, 4 hrs, Lincoln Elementary, effective August 29, 2017 (Limited Term)

Laquita Garbarino: Educational Assistant 2, 4 hrs, Lincoln Elementary, effective August 29, 2017 (Regular/Probationary)

Reem Al-Harchan: Educational Assistant 2, 4 hrs, Adams Elementary, effective August 29, 2017 (Regular/Probationary)

Heather Davis: Educational Assistant 2, 8 hrs, Harding Center, effective August 29, 2017 (Regular/Probationary)

Armando Arriaga Munoz: Student Behavior Support 2, 7.5 hrs, Linus Pauling Middle School, effective August 29, 2017 (Limited Term)

Alexandra Rominger: Educational Assistant 2, 7.5 hrs, Linus Pauling Middle School, effective August 29, 2017 (Regular/Probationary)

Danielle Walls: Educational Assistant 2, 6.5 hrs, Linus Pauling Middle School, effective August 29, 2017 (Regular/Probationary)

Samuel Dickson: Educational Assistant 2, 6.5 hrs, Linus Pauling Middle School, effective August 29, 2017 (Regular/Probationary)

Robert Yde: Educational Assistant 2, 7 hrs, Crescent Valley High School, effective August 29, 2017 (Regular/Probationary)

Kathryn Borninski: School to Career Transition Specialist, 5.5 hrs, Crescent Valley High School, effective August 29, 2017 (Regular/Probationary)

Kylah Reynolds: Educational Assistant Life Skills, 7 hrs, Linus Pauling Middle School, effective August 29, 2017 (Regular/Probationary)

Robert Bowman: Educational Assistant Life Skills, 8 hrs, Corvallis High School, effective August 29, 2017 (Regular/Probationary)

Omar Abdulaziz: Information Services Technical Support 1, 7 hrs, Corvallis High School, effective September 1, 2017 (Regular/Probationary)



Corvallis

SCHOOL DISTRICT

Chelsea Welever: Educational Assistant Life Skills, 7 hrs, Jefferson Elementary, effective August 29, 2017 (Regular/Probationary)

Sadie McMullen: Educational Assistant Life Skills, 7 hrs, Linus Pauling Middle School, effective August 29, 2017 (Regular/Probationary)

Amanda Owen: Educational Assistant Life Skills, 7 hrs, Linus Pauling Middle School, effective August 29, 2017 (Regular/Probationary)

Samantha Gonzalez: Educational Assistant Life Skills, 7 hrs, Linus Pauling Middle School, effective August 29, 2017 (Regular/Probationary)

Shyla Warnock: Food Service Assistant, 4 hrs, Central Kitchen, effective September 8, 2017 (Regular/Probationary)

Victorian Rausch: Food Service Assistant, 2 hrs, Crescent Valley High School Kitchen, effective September 11, 2017 (Regular/Probationary)

Alexander Bullock: Food Service Assistant, 4 hrs, Central Kitchen, effective September 11, 2017 (Regular/Probationary)

Termination/Resignation/Layoff/Retirement

Amanda Owen: Educational Assistant Life Skills,, 7 hrs, Linus Pauling Middle School, effective September 8, 2017 (Resignation)

Brianna Tilleman: Educational Assistant 2,, 5 hrs, Mt. View Elementary, effective August 28, 2017 (Resignation)

Tori Amato: Educational Assistant 2, 7 hrs, Franklin Elementary, effective June 30, 2017 (Resignation)

Tressa Remington: Food Service Assistant, 4.75 hrs, Central Kitchen and Philomath Clements, effective June 30, 2017 (Resignation)

Shannon Fast: Educational Assistant 2, 6.75 hrs, Cheldelin Middle School, effective June 22, 2017(Resignation)



Corvallis

SCHOOL DISTRICT

X.B. Unaudited Financial Statements - July 31, 2017



Corvallis

SCHOOL DISTRICT

Prepared for: Corvallis School Board

Prepared by: Olivia Meyers Buch, Finance and Operations Director

Meeting Date: September 14, 2017

July Financial Statements (Unaudited)

NO ACTION REQUIRED

Background

The Statement of Resources and Requirements for the General Fund for the period ending July 31, 2016 and July 31, 2017 follow this report.

Year-to-date operating revenues through the end of July 2017 total \$5.53 million or 8.0% of total budgeted operating revenues as compared to \$5.04 million or 7.9% through the end of July 2016. As usual, revenues from the state school fund constitute the significant source of funds at this point in the year.

The beginning fund balance reflects an increase of \$0.67 million over the adopted budget of \$9.47 million. Overall, total resources in 2016-17 were 100.5% of budget while total expenditures were 98.2% of budget.

Year-to-date operating expenditures through the end of July 2017 total \$2.07 million or 3.0% of total budgeted operating expenditures as compared to \$2.02 million or 3.1% through the end of July 2016. Contracted payroll increases account for the majority of the increase.

Projected resources and requirements through June 30, 2018 result in an ending fund balance of \$11.8 million, or 16.8% of projected operating revenues. All General Fund reserves are projected to be at or above the designations outlined in board policy on June 30, 2018. The projected ending fund balance reflects a change in fund balance, or operating surplus, of \$1.7 million; however, as state school funds are being distributed equally over the biennium, a large portion of surplus funds will be set aside to cover a portion of roll up costs in 2018-19.

Fiscal year 2016-17 financial records are in the process of being closed and staff are preparing schedules in anticipation of the annual fall visit from the auditors. The district's auditors will be on site in October to complete final fieldwork. Staff are also preparing a supplemental budget scheduled for board review on December 7th that will propose increasing appropriations to account for school discretionary carryover allowances and staffing or programmatic changes made after the budget was adopted.

January 31, 2017 Financial Statements (Unaudited), continued.

Please contact me with questions or if you would like any additional information.

Supplementary Materials

1. Statements of Resources and Requirements as of July 31, 2016 and 2017
2. Schedule of Investments as of July 31, 2017
3. Schedule of Cash Disbursements greater than or equal to \$1,000 for the period of July 1 – July 31, 2017

Corvallis School District 509J
Statement of Resources and Requirements
Fiscal Year to Date as of July 31, 2016 and 2017 Respectively (Unaudited)

General Fund

	FY 2016-17					FY 2017-18				
	Amended	Actuals Thru	% of	Actuals Thru	% of	Adopted	Actuals Thru	% of	Projected Thru	% of
	Budget	07/31/2016	Budget	06/30/2017	Budget	Budget	07/31/2017	Budget	06/30/2018	Budget
RESOURCES										
State School Fund Formula Revenue										
State School Fund - General Support	\$ 31,748,251	\$ 5,041,041	15.9%	\$ 30,803,517	97.0%	\$ 34,106,224	\$ 5,526,633	16.2%	\$ 35,967,992	105.5%
Property Taxes Levied by District	26,014,907	-	0.0%	26,014,937	100.0%	26,747,906	-	0.0%	26,729,029	99.9%
Common School Fund	834,692	-	0.0%	1,184,612	141.9%	829,828	-	0.0%	829,828	100.0%
County School Funds	140,000	-	0.0%	373,614	266.9%	140,000	-	0.0%	140,000	100.0%
Local Option Taxes Levied by District	4,545,040	-	0.0%	4,554,757	100.2%	4,769,350	-	0.0%	4,764,824	99.9%
Earnings on Investments	180,000	1,741	1.0%	314,241	174.6%	170,000	-	0.0%	170,000	100.0%
State School Fund Prior Year Adjustment	(54,226)	-	-	274,920	-	-	-	-	(186,878)	-
Other	795,003	1,614	0.2%	1,032,618	129.9%	2,165,500	3,046	0.1%	2,158,474	99.7%
Total Operating Revenues	\$ 64,203,667	\$ 5,044,396	7.9%	\$ 64,553,217	100.5%	\$ 68,928,808	\$ 5,529,679	8.0%	\$ 70,573,269	102.4%
Beginning Fund Balance	\$ 10,278,573	\$ 8,388,192	81.6%	\$ 10,278,573	100.0%	\$ 9,469,325	\$ 10,278,573	108.5%	\$ 10,137,427	107.1%
TOTAL RESOURCES	\$ 74,482,240	\$ 13,432,588	18.0%	\$ 74,831,790	100.5%	\$ 78,398,133	\$ 15,808,252	21.1%	\$ 80,710,696	102.9%
REQUIREMENTS										
Salaries	\$ 34,920,419	\$ 533,226	1.5%	\$ 34,848,046	99.8%	\$ 36,724,126	\$ 583,256	1.6%	\$ 36,356,885	99.0%
Associated Payroll Costs	19,366,811	269,812	1.4%	18,568,482	95.9%	20,509,491	\$ 285,618	1.4%	20,304,396	99.0%
Purchased Services	7,702,555	183,473	2.4%	7,882,385	102.3%	8,046,871	\$ 177,308	2.2%	7,966,402	99.0%
Supplies and Materials	2,929,169	297,254	10.1%	2,449,145	83.6%	3,071,333	\$ 214,026	7.0%	3,040,620	99.0%
Capital Outlay	86,000	-	0.0%	106,601	124.0%	286,000	\$ 22,900	8.0%	283,140	99.0%
Other Objects	861,009	732,241	85.0%	839,703	97.5%	926,809	782,798	84.5%	917,541	99.0%
Total Operating Expenditures	\$ 65,865,963	\$ 2,016,006	3.1%	\$ 64,694,362	98.2%	\$ 69,564,630	\$ 2,065,906	3.0%	\$ 68,868,984	99.0%
Transfers	\$ -	-	-	-	-	\$ -	-	-	-	-
Contingency	1,530,092	-	-	-	-	1,723,220	-	-	-	-
Rainy Day Reserves	3,210,183	-	-	-	-	3,446,440	-	-	-	-
Unappropriated Reserves	2,553,183	-	-	-	-	2,750,794	-	-	-	-
Unappropriated Reserve (PERS)	1,322,819	-	-	-	-	913,049	-	-	-	-
TOTAL REQUIREMENTS	\$ 74,482,240	\$ 2,016,006		\$ 64,694,362		\$ 78,398,133	\$ 2,065,906		\$ 68,868,984	
ENDING FUND BALANCE		\$ 11,416,582		\$ 10,137,427		\$ 13,742,346			\$ 11,841,712	
Contingency				1,613,830	2.5% *				1,764,332	2.5% *
Rainy Day Reserves				3,227,661	5.0% *				3,528,663	5.0% *
Unappropriated Reserves				3,973,117	6.2% *				4,166,098	5.9% *
Unappropriated Reserve (2018-19 Roll up)				-	0.0% *				1,469,570	14.5% *
Unappropriated Reserve (PERS)				1,322,819	2.0% *				913,049	1.3% *
* Percent of Operating Revenue				10,137,427	15.7% *				11,841,712	16.8% *

Corvallis School District 509J

Schedule of Investments

July 31, 2017

Type of Investment	Investment Date	Maturity/ Call Date	No. of Days	Bond Equivalent Yield	Purchase Price	Par (Maturity) Value
US Government-Sponsored Enterprises (Total):	03/29/16	09/29/17	549	0.850%	\$100.00	1,000,000
	05/17/16	11/17/17	549	0.875%	\$100.00	1,000,000
	11/17/16	02/08/18	448	0.825%	\$100.06	1,000,000
	11/17/16	03/08/18	476	0.850%	\$99.94	1,000,000
	11/17/16	04/09/18	508	0.869%	\$99.84	1,000,000
	11/17/16	05/14/18	543	0.891%	\$99.76	1,000,000

Total Investments outside of Local Government Investment Pool: \$ 6,000,000

Local Government Investment Pool:	Average Annualized Rate	
General Account	1.45%	\$ 20,589,459
Debt Service Account	1.45%	538
Subtotal LGIP ¹		<u>\$ 20,589,997</u>

Local Government Investment Pool - Pension Bond Debt Service:

Pension Bond Debt Service Account:⁴ 1.45% \$ 390,616

Total Investments \$ 26,980,612

1. The maximum amount (in any combination of accounts) that the Local Government Investment Pool (LGIP) allows in an account is \$47,012,858
2. The PERS Bond Debt Service Account is outside of the LGIP limit, and collects the PERS intercept payments from the Basic School Fund for payment twice a year to the bond holders of the PERS bond debt.
3. This investment was purchased at a premium to (or in excess of) the par (maturity) value. The investment includes semi-annual coupon payments, that together with the par values exceed their purchase price and yield the Bond Equivalent Yield displayed.

Compliance with Investment Policy

Type of Investment	Maximum Percent of Portfolio per Policy	Current Percent
US Government-Sponsored Enterprises (Total):	90.0%	22.2%
US Treasury Obligations	100.0%	0.0%
Local Government Investment Pool	100.0%	77.8%
Bankers Acceptances	25.0%	0.0%
Repurchase Agreements	25.0%	0.0%
State and Local Government Securities	25.0%	0.0%
Time Certificates of Deposit & Collateralized Money Market	50.0%	0.0%
Commercial Paper (bonds and promissory notes issued by corporations)	10.0%	0.0%
TOTAL		100.00%

Benchmarks as of 7/31/17:

3-Month U. S. T-Bill bond equivalent yield: 1.08%

3-Mo. Jumbo CDs 1.26%

Corvallis School District 509J
Schedule of Cash Disbursements greater than or equal to \$1,000
For the period of July 1, 2017-July 31, 2017

Vendor by Fund and Object	Check Total
100 - General Fund	
Charter School Payments	
INAVALE COMMUNITY PARTNERS, INC	128,211.20
Computer Software	
FOLLETT SCHOOL SOLUTIONS, INC	51,171.88
PERFORMIO SOLUTIONS, INC. DBA EDCALIBER	12,500.00
RENAISSANCE LEARNING, INC	52,357.89
SCHOOLDUDE.COM	22,099.09
SHOWBIE, INC	6,650.00
WEST INTERACTIVE SERVICES CORPORATION	11,940.25
Consumable Supplies and Materials	
CHRISTENSON ELECTRIC, INC.	1,836.00
HOME DEPOT CREDIT SERVICES	1,434.27
OETC	28,807.20
PLATT ELECTRIC SUPPLY CO	1,805.33
TOTAL FILTRATION SERVICE INC	3,833.28
WAXIE SANITARY SUPPLY	10,664.80
Dues and Fees	
COSA	22,355.00
OREGON SCHOOL BOARDS ASSOCIATION	8,658.25
Instructional, Professional and Technical Service	
J STUART ABLON Ph D	10,000.00
Other Communication Services	
COMCAST/INSTITUTIONAL NETWORKS	15,053.44
Other Non-instructional Professional and Technical	
INK INTERNATIONAL INCORPORATED	8,500.00
SELECTEMP EMPLOYMENT SERVICES	1,148.16
Other Property Services	
US Bank Equipment Finance	4,090.41
Periodicals	
OREGON SCHOOL BOARDS ASSOCIATION	1,095.00
Postage	
POSTMASTER - CORVALLIS	4,626.60
Repairs and Maintenance Services	
HOODZ OF CLACKAMAS	1,453.00
KONE INC	6,143.76
SYNERGY SECURITY SOLUTIONS	9,598.00
Telephone	
CENTURYLINK	4,386.75

Corvallis School District 509J
Schedule of Cash Disbursements greater than or equal to \$1,000
For the period of July 1, 2017-July 31, 2017

Vendor by Fund and Object	Check Total
Travel, Out of District	
Garcia, Elizabeth A	1,117.54
Mudd, Kira C	1,260.10
Swenson, Stephanie L	1,216.62
Taxes and Licenses	
DEPARTMENT OF CONSUMER & BUSINESS SVCS	1,379.84
Legal Services	
OREGON SCHOOL BOARDS ASSOCIATION	1,600.00
Technology Taggable Equip <\$5,000	
APPLE INC C/O APPLE FINANCIAL SERVICES	120,540.00
APPLE INC. C/O APPLE FINANCIAL SERVICES	114,165.00
APPLE, INC	12,435.00
100 - General Fund Total	684,133.66
203 - Food Service Fund	
Food - Food Service Only	
DUCK DELIVERY PRODUCE INC	4,195.57
FRANZ FAMILY BAKERIES	1,065.84
LOCHMEAD DAIRY	1,430.39
Inventories	
MCDONALD WHOLESALE CO	18,657.84
Repairs and Maintenance Services	
GENERAL PARTS LLC	1,426.50
Travel, Out of District	
Gibson, Sharon M	1,727.51
203 - Food Service Fund Total	28,503.65
298 - Designated Revenue Fund	
Consumable Supplies and Materials	
PC & MACEXCHANGE	12,030.00
298 - Designated Revenue Fund Total	12,030.00
601 - Insurance Fund	
Group Insurance	
SAIF CORPORATION	201,618.00
Property Insurance Premiums	
BARKER-UERLINGS INSURANCE, INC	432,007.00
601 - Insurance Fund Total	633,625.00
Grand Total	1,358,292.31



Corvallis
SCHOOL DISTRICT

XI. ADJOURNMENT

*All times are approximate.

Note: The Chair of the Board may alter the order of business as they deem proper and necessary.



Corvallis

SCHOOL DISTRICT

Agendas – Agendas and supporting materials are available online at <https://v3.boardbook.org/Public/PublicHome.aspx?ak=1000829> a few days before each School Board meeting. For more information, please contact Kim Nelson at kimberly.nelson@corvallis.k12.or.us.

Communication With The School Board – Communication with the Board can be made by telephone, letter, e-mail and public testimony. Letters may be addressed to individual Board members or the Board as a whole and sent to 1555 SW 35th Street, Corvallis, OR 97333. E-mail may be sent to schoolboard@corvallis.k12.or.us and will be sent to all board members simultaneously as well as to key District Office staff. For more information, please contact Kim Nelson at kimberly.nelson@corvallis.k12.or.us.

Consolidated Action Agenda – The purpose of the consolidated action agenda is to expedite action on routine agenda items. All agenda items that are not held for discussion at the request of a Board member or staff member will be approved/accepted as written as part of the consolidated motion. Items designated or held for discussion will be acted upon individually.

Public Comment –

Guidelines are at: <https://www.csd509j.net/about-us/school-board/provide-input-and-be-informed/>

Executive Session – Permissible purposes of Executive Sessions include: ORS 192.660(2)(a) – Employment of Public Officers, Employees and Agents; ORS 192.660(2)(b) – Discipline of Public Officers and Employees; ORS 192.660(2)(d) – Labor Negotiator Consultations; ORS 192.660(2)(e) – Real Property Transactions; ORS 192.660(2)(f) – Exempt Public Records; ORS 192.660(2)(h) – Legal Counsel; ORS 192.660(2)(i) – Performance Evaluations of Public Officers and Employees; ORS 192.660(2)(j) – Public Investments.

Grievance Process - ORS 192.705

Grievances alleging a violation by a governing body of provisions in Public Meetings Law may be submitted in writing to Kim Nelson at kim.nelson@corvallis.k12.or.us or submitted between 8:00 am – 5:00 pm Monday through Friday at 1555 SW 35th Street, Corvallis, OR 97333. Additional information is available on the district website.

SCHOOL BOARD MEMBERS			
Judah Largent	541-231-8415	Terese Jones, Co-Vice Chair	541-230-1673
Sami Al-Abdrabbuh	541-283-6611	Shauna Tominey, Co-Vice Chair	541-829-8411
Chris Hawkins	541-602-2045	Luhui Whitebear, Chair	541-714.3305
Bernie Wang	541-704-7298		

EXECUTIVE STAFF MEMBERS	
Ryan Noss, Superintendent	541-757-5841
Melissa Harder, Assistant Superintendent / Human Resources Director	541-766-4857
Lauren Wolfe, Finance Director	541-757-5874
Byron Bethards, Student Growth & Experience Director	541-757-5470
Kim Patten, Operations Director	541-757-3849
Kim Nelson, Executive Assistant to the Superintendent; Board Secretary	541-757-5841