



## Bureau of Planning and Sustainability

Innovation. Collaboration. Practical Solutions.

**DATE:** February 11, 2015

**TO:** Planning and Sustainability Commission

**FROM:** Deborah Stein, Principal Planner; Bob Glascock, Senior Planner

**CC:** Susan Anderson, Director; Joe Zehnder, Chief Planner; Eric Engstrom, Principal Planner

**SUBJECT:** **School Capacity at David Douglas School District, February 24 PSC Work Session**

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This report focuses on the City's role in collaborating with David Douglas School District (DDSD) to address the district's school capacity challenges, in the context of the Comprehensive Plan. This report is intended to inform the Planning and Sustainability Commission work session on February 24, 2015.

### Testimony

Most testimony on this topic favored slowing housing growth in DDSD to relieve school overcrowding. By slowing housing growth, there may also be less pressure on overtaxed streets and other infrastructure. There is a recognition that most DDSD schools are already over capacity.

### Discussion Questions

1. **Schools/growth policy** — How do we best manage housing growth in areas of sustained school overcrowding (focusing on the David Douglas School District)?
2. **Search for school sites** — Should the City take a more active role in helping DDSD to find and acquire new school sites?

*\*NOTE: This report only addresses program-related actions to address school capacity at DDSD. Several mapping actions in DDSD will be addressed in the Residential Densities staff report for the March 10, 2015 PSC work session. For details, see Pages 7 and 8 of this report. Mapping actions include:*

- *Down-designations, particularly in Powellhurst-Gilbert, to address deficiencies in infrastructure and connectivity.*
- *Down-zonings (with no change to Comprehensive Plan map designations) to directly address DDSD's school capacity challenges.*



## Attachments

- A — Sample Intent to Collaborate on Schools.
- B — School Facility Planning – a Checklist for Superintendents.
- C — Status of David Douglas School District’s Long Range Facilities Plan.
- D — Housing Allocations by Elementary School in David Douglas School District, June 2014.
- E — Washington County Experience with School Service Letters.



## Background

### *Why is school capacity important to address through the Comprehensive Plan?*

- **Community context**—East Portland and overcrowded schools in DDSD.
- **Legal context**—ORS 195.110, last amended in 2007, allows for the District to influence decisions on residential development applications when objective criteria to determine whether adequate capacity exists have been adopted by the District and local jurisdictions.
- **Testimony**—DDSD and others in East Portland have requested that the City address DDSD school capacity issues.
- **Policy context**—Education and youth success is one of the cornerstones of the Portland Plan, which provides direction to the update of the city's Comprehensive Plan.

### Community context

East Portland has experienced rapid growth in population and school enrollment. Multi-dwelling housing development has replaced low-density single dwellings in many locations since adoption of the Outer Southeast Community Plan in 1996. Average family size is larger than the citywide average. More students live in poverty, and nearly a hundred languages are spoken by students of David Douglas, Reynolds, Parkrose and Centennial school districts. This strains school district resources and makes it hard for school districts to provide the variety of services their diverse students deserve and demand.

The state of Oregon distributes income tax revenues to school districts based on the number of enrolled students. Property tax limitations (1990's) capped local revenue to school districts. Most East Portland school districts, with increasing enrollment, receive more state funds for operations, but lack the capital (tax base) to fund new facilities.

Between 1996 and 2014, DDSD grew from 7,260 to 10,823 students. One projection is that DDSD could see an additional 6,000 students over the next 20 years (with current zoning). DDSD reports that several of its schools are above target enrollment (overcrowded). Most of its schools are projected to exceed target enrollment in the future. In testimony, DDSD says it may need two additional elementary schools, two K-8 schools, and one additional high school to accommodate the current projected growth.

The exception is Parkrose School District, which has upgraded its facilities with a successful bond measure. In May 2011, its voters approved a \$63 million bond package (replacing its middle school, renovating/adding onto four elementary schools, and districtwide technology, security, maintenance and repair). Parkrose School District reports excess capacity at its middle school.

### Legal context

In Oregon, the regulatory context for school facility planning rests with ORS 195.110. First adopted in 1993, the state legislature has since amended school facility planning statutes in 2001 and 2007. If a large school district adopts a school facility plan, the City must take three actions:

1. Include the plan in the City's comprehensive plan.



2. Cooperate with the school district in identifying land for school facilities and take necessary actions, including imposing appropriate zoning or adding one or more sites for designated school facilities.
3. Accept and apply school districts' objective criteria (listed in a school facilities plan and used for determining whether adequate capacity exists to accommodate projected development). However, the City's obligation to use or apply these criteria is limited to two purposes: a) approving or denying applications for comprehensive plan amendments, and b) adopting amendments to "residential land use regulation[s]".

The City can deny an application for residential development based on the lack of school capacity if three elements are present:

1. The school district raises the issue of its lack of capacity.
2. The lack of capacity is based on a school facility plan formally adopted in compliance with state law.
3. The City has "considered options to address school capacity."

The school district must formally adopt a school facility plan, in order for the City to address the school district's capacity issues for land use purposes in its comprehensive plan and zoning code. This is a prerequisite to City actions on school capacity.

Portland Public Schools completed its school facility plan in 2012. DDSB has made substantial progress toward completing its school facility plan, and will likely adopt a plan in time for Comprehensive Plan implementation.

### Testimony

Testimony can be generally grouped into three categories:

1. *Supply (school capacity)*
  - a. The DDSB School Board Chair wrote, "Within the DDSB boundaries, there currently is not adequate land available to accommodate the additional facilities, nor does the District have the bonding capacity to fund the additional schools needed to accommodate the current projected growth."
  - b. A close-in resident opposes use of school capacity as a reason to downzone. The testifier asserts that the affected school district can use the additional funds it gets from extra pupils, to expand the schools.
2. *Demand (housing with school-age children)*
  - a. Leaders of David Douglas School District request that the Comprehensive Plan significantly reduce high-density housing in DDSB.
  - b. East Portland residents and a state representative for East Portland propose or support additional zoning changes to reduce residential density, citing limited school capacity (in DDSB) and lack of infrastructure (sidewalks, parks, community centers, connecting streets, crosswalks, etc.).
  - c. Neighbors or others (not necessarily from East Portland) support downzoning, in part to avoid school overcrowding/capacity pressures.
3. *Process (adoption, implementation)*



- a. Southwest residents cite state statutes (ORS 195.110, ORS 197.768) as requiring that the Comprehensive Plan include long range school facility plans (of large school districts) and holding public hearings for these plans. Portland Public Schools (PPS) has completed its school facility plan and DDSD is in the process.
- b. The Bureau of Development Services (BDS) asks that the Comprehensive Plan define “school facility plan” and its key components, if school district capacity is added to adequacy of services criterion for zoning map amendments. BDS wrote that school districts should be prepared to respond to individual land use review cases in a timely, site-specific way and explain how they determine adequacy of school facilities (in service letters).

### Policy context

During the Portland Plan process, school districts and the City agreed to partner to advance Thriving Educated Youth as an integrated strategy. Equity is also relevant for DDSD, with a highly diverse student population, high percent subsidized population (80% of families qualify for free or reduced-price school lunches), subsidized housing, and lagging job growth in East Portland.

Proposed Comprehensive Plan Goal 8.K., School Facilities, is adapted from Portland Plan guiding policy T-10. All Portlanders, not just students, can benefit as local school districts upgrade existing facilities and design new campuses to meet 21<sup>st</sup> century opportunities and challenges. Schools can serve as hubs for social gathering and physical as well as education (both formal and informal) for people of all generations, cultures and abilities—a concept strongly supported by “age-friendly city” advocates.

In developing the proposed Comprehensive Plan, BPS convened eight policy expert groups (PEGs) to discuss policy recommendations. The **Education & Youth Success** PEG reviewed Comprehensive Plan background materials and analyses to understand issues related to education / youth as addressed in the Comprehensive Plan. The Education and Youth Success PEG advised the City to:

- Link school-related enrollment, capacity and funding issues to City levers in managing growth. City levers include zoning, infrastructure improvements and incentives.
- Coordinate urban renewal and other public/private financial investments to benefit and support schools.
- Initiate closer, sustained coordination with all school districts. This includes, but is not limited to, tracking shifts in building activity and demographics related to school enrollment, and coordinating on shared use of recreational fields and planning for community uses in schools.

The proposed Comprehensive Plan recognizes that public schools are essential public facilities, even though the City of Portland is not an education service provider. The proposed Comprehensive Plan provides an avenue to include school facility plans and address a mismatch between housing growth and school capacity, in DDSD.



## ***Staff approach***

To develop this proposal, BPS staff followed these steps in collaborating with DDS:

1. Briefed the Superintendents' Council on several occasions. In May 2013, BPS staff previewed population growth forecasts for school districts in Portland. In November 2013, BPS staff identified school district and City roles in school facility plan process, as outlined by the Oregon Department of Education. See Attachment B for a task checklist for school districts and the City.
2. Participated in DDS's school facility plan process (five meetings between February and June 2014). See Attachment C for DDS's current status on the task checklist.
3. Prepared growth-related data for DDS to use in its plan process (June 2014). BPS provided Year 2035 housing allocation data by elementary school in DDS. See Attachment D.
4. Provided DDS with a fiscal impact analysis tool, for use in modeling different enrollment scenarios.
5. Researched methods to implement school capacity for zoning map amendments. See Attachment E for a summary of Washington County's experience with school service letters.

## **Discussion Question 1. How do we best manage housing growth in areas of sustained school overcrowding (focus on David Douglas School District)?**

### ***Potential City actions***

- A. Improve collaboration between DDS and the City of Portland.
- B. Provide development-related information.
- C. Add school capacity as a required public service for zoning map amendments.
- D. Change the Comprehensive Plan map and/or zoning map within DDS's boundaries to reduce the potential for additional housing development in DDS that would further strain the district's school capacity.



### **A: Improve collaboration between DDSD and the City of Portland.**

A range of possible collaboration activities between school districts and the City were discussed by the Education & Youth Success PEG. With this in mind, BPS has prepared a draft letter of intent to collaborate (see Attachment A of this report). The letter of intent can be tailored to the mutual interests of each school district and the City. The Memorandum of Understanding format allows the parties to enter into a voluntary agreement. The City would adopt each MOU by resolution, not by ordinance.

Collaborative activities may include designating liaisons for particular functions, seeking opportunities to leverage each others' community engagement processes, seeking opportunities to promote youth/adult partnerships, and sharing data and expertise of mutual interest. Spinoff binding agreements between a school district and the City may include coordination on school facilities planning; joint use of school buildings, school fields and grounds; and safe routes to schools. Binding agreements are typically adopted by ordinance, in the form of Intergovernmental Agreements (IGA's).

### **B: Provide development-related information.**

The Bureau of Development Services provides monthly development permit data to DDSD. Due to a software limitation, those monthly reports do not record the number of bedrooms in residential structures. BDS also sends DDSD notices of Type III land use cases. Potentially, BDS could send DDSD more land use notices (Type II and pre-application conferences). Information, alone, will not relieve DDSD of school overcrowding, but can enable the school district to comment on land use cases and anticipate localized growth in its school catchment areas.

### **C: Add school capacity as a required public service for approval of zoning map amendments.**

BPS staff has identified two Portland-area school districts that have adopted a) school facility plans and b) objective criteria to determine school capacity. In 2010, Beaverton School District amended its school facility plan, and added the objective criteria. In 2012, Gresham-Barlow School District adopted its school plan, with objective criteria based on Beaverton School District's formula. The formula is based on building area and a ratio of area per student. For the collaboration between Beaverton School District and Washington County, see Attachment D.

To activate a school service provider process, the City would need to include the school facility plan in the comprehensive plan, cooperate with the school district in identifying land for new school facilities, and accept the school district's objective criteria on school capacity. Then, ORS 195.110 allows the City to deny applications for two land use actions:

- Comprehensive plan amendments.
- Amendments to residential land use regulations.

The school service provider process would effectively add DDSD as a required service provider to approve certain zoning map amendment applications. Approval criteria for zoning map amendments (for a base zone change) are compliance with the Comprehensive Plan Map and adequate public services. BDS already sends to DDSD notices of Type III (mandatory hearing) reviews and monthly



development reports. Zoning map amendments are a Type III review. DDS, in turn, would need to send BDS a detailed service letter response within a 30-day window, confirming whether there is available school district capacity to serve the new residential units.

DDS may also want to receive all the notices that neighborhood associations receive, for land use applications in their boundaries. This would enable the school district to stay informed of potential new residential development that could place demands on school capacity. In early February, DDS administrators confirmed that they would commit administrative staff to make timely and detailed responses in school service provider letters.

### ***Other approaches***

According to the City Attorney, moratoria in Oregon based on school capacity are no longer legal. ORS 195.110(11), states, “The capacity of a school facility is not the basis for a development moratorium under ORS 197.505 to 197.540.” The City Attorney advises it is not possible under any circumstances for the City to adopt a moratorium based on the lack of school facilities—in David Douglas School District or any other school district within the City.

### **D: Change the Comprehensive Plan map and/or zoning map within DDS’s boundaries to reduce the potential for additional housing development in DDS that would further strain the district’s school capacity.**

There are two ways this approach can be implemented (listed below). Staff proposes a combination of these two approaches. More discussion and details will follow in the PSC’s March 10, 2015 work session (Residential Densities).

- i. **Change Comprehensive Plan map designations to decrease the potential for future residential development.** This has been proposed in portions of East Portland (particularly in the Powellhurst-Gilbert neighborhood) where there is a combination of infrastructure and connectivity deficiencies, including but not limited to school capacity. This action signals that during the planning period covered by the Comprehensive Plan (through 2035), residential densities that are allowed under today’s Comprehensive Plan are more intense than what the current and planned infrastructure (including school district capacity) can support.
- ii. **Retain current Comprehensive Plan map designations, but change zoning map designations to allow lower density residential development than is allowed today.** This is proposed in portions of David Douglas School District to address the district’s current capacity challenges. The retention of the Comprehensive Plan designation signals that once the current pressures are alleviated with new facilities and/or programmatic changes, the zoning can change through legislative or quasi-judicial zoning map changes to match the higher densities allowed by the Comprehensive Plan map designations. The presumption would be that the higher densities can be supported by infrastructure and connectivity long-term, but not in the short term. Properties





seeking a zone change would be subject to the school service letter process outlined in Potential City Action B, above.

**E: Adjust boundaries between school districts. The City has no direct role in this option.**

East Portland is served by several school districts, in addition to David Douglas. To the north is Parkrose School District. Centennial School District (which serves Portland and Gresham) and Reynolds School District (which serves Portland, Gresham, Fairview, Wood Village and Troutdale) are located to the east. To the west is Portland Public Schools (which encompasses a portion of Lents and Powellhurst-Gilbert just east of I-205).

Each school district has decision-making autonomy and addresses fiscal, facilities and enrollment issues (among others) under the direction of its elected school board. Superintendents from all Multnomah County school districts meet monthly as a Superintendents Council to coordinate, share information and problem-solve about issues of mutual interest and concern. The City has been invited to provide information to the Superintendents' Council and, if invited, could help to facilitate conversations between school districts, but has no authority to weigh in on the boundaries between school districts.

## **Discussion Question 2. Should the City take a more active role in helping DDSD to find and acquire new school sites?**

### ***Potential City actions***

- A. Confirm suitable land for school sites in DDSD. This is the minimum legal requirement.
- B. Facilitate safe access to schools.
- C. Make or facilitate other capital improvements that benefit DDSD schools.



**A: Confirm suitable land for school sites in DDSD. This is the minimum legal requirement.**

During the school facility planning process, DDSD identified acquiring new school sites as an immediate priority. Since June 2014, DDSD has acquired a commercial site to relocate its administrative offices from the high school campus.

To date, DDSD has not asked the City to evaluate specific properties as potential new school sites.

Generally, public schools are allowed by right in mixed use and employment zones and as conditional uses in residential zones. Schools are prohibited in industrial zones. (Note that the new Campus Institution designation is proposed for all public high schools in Portland as part of the proposed Comprehensive Plan. This designation is also proposed for private high schools over ten acres in size. At this time, no zone changes are proposed on any school campus irrespective of Comprehensive Plan designation.)

**B: Facilitate safe access to schools.**

DDSD is a partner to the City’s Safe Routes to Schools program. Several of the DDSD school facilities have been evaluated for safe access, and some safe routes improvements have been identified. Safe Routes to School is an ongoing program identified within the Transportation System Plan.

**C: Make other capital improvements that benefit DDSD schools.**

The PSC will consider priority transportation projects in the TSP. Other City services are outlined in the Citywide Systems Plan. Project-by-project investment decisions are made with the annual City budget process. Regardless of funding responsibility, the City may identify specific growth-related capital improvement needs identified by our partner agencies within the CSP as a means to elevate their importance. Inclusion of DDSD facilities in the citywide CSP project list does not translate directly to funding, but may be a way to memorialize the need for facility related coordination.

The Portland Plan includes an action item to “Develop a funding Strategy for the Gateway Education Center as a partnership of Parkrose and David Douglas school districts, Mount Hood Community College, Portland State University, and the City of Portland” (5-year Action #48). Noting this action item in the CSP may be a way to communicate the City’s interest in advancing the DDSD facilities discussion.



## ATTACHMENTS

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## ATTACHMENT A. Sample Intent to Collaborate on Schools

### City of Portland and \_\_\_\_\_ School District Collaboration Memorandum of Understanding

This Memorandum of Understanding serves to forge a productive and sustainable relationship between the City of Portland, Oregon and \_\_\_\_\_ School District.

- The City of Portland provides urban services and strives to improve the quality of life for citizens and visitors.
- \_\_\_\_\_ School District has served the East Portland Community for well over a century. It has \_\_\_\_ schools serving approximately \_\_\_\_ students.

#### Purpose

Portland's overarching goal is to be a prosperous, educated, healthy and equitable city. To accomplish this, public agencies and others should look for opportunities to collaborate. Each Party's decisions and actions affect each other directly and indirectly, so it is vital to consult and coordinate on an ongoing basis.

Both Parties promote cooperation, friendly relationships and mutual benefit, while respecting each other's missions and decision-making authority.

The community benefits when the City partners with school districts on school facility planning and siting. By encouraging school facilities to be multi-functional neighborhood anchors, designed and programmed to serve community members of all generations and abilities, these policies also help implement the concept of Portland as an age-friendly city.

This MOU sets a framework, but does not legally obligate any party.

#### Collaborative Activities

1. **Find connections between the Parties' missions, and consult early.**
  - a. City agrees to consult with school districts at early stages of such activities as significant Comprehensive Plan changes, tax exemption programs, bond measures or levies on ballot, significant infrastructure decisions, Portland Parks & Recreation master plans, and community uses in school facilities.
  - b. \_\_\_\_\_ School District agrees to consult with the City at early stages of such activities as boundary changes, reconfigurations, bond measures or levies on ballot, facilities planning/major upgrades or rebuild projects, and community uses in school facilities.
2. **Clear and timely communication.**
  - a. Designate liaison(s) for particular functions, to build relationships and enable efficient and timely information-sharing.
  - b. Establish systematic communication channels and protocols.
  - c. Consult at appropriate levels within each organization.
  - d. Consider use of existing forums, such as Superintendents' Council, to share information.



3. **Seek opportunities to leverage each others' community engagement processes, to expand audience and be inclusive.**
  - a. City engages the public, formally and informally, on City services and development issues.
  - b. \_\_\_\_\_ School District engages the school community through its school board and committees as well as parent-teacher organizations at school sites.
4. **Seek opportunities to promote youth/adult partnerships.**
  - a. Promote student participation in community affairs.
  - b. Promote opportunities for mentorships, student job shadowing and career development.
5. **Share data and expertise.**
  - a. City may provide data on population forecasts, demographics, land use and transportation, and infrastructure asset management.
  - b. \_\_\_\_\_ School District may provide data on school facilities (use and condition), community uses in those facilities, enrollment projections, student transportation, languages used, and access to technology.
6. **Shared advocacy.**
7. **What do we do if we disagree on policies or practices?**

### Potential Agreements

With this framework, the City of Portland and \_\_\_\_\_ School District may pursue legally-binding agreements. Examples include (but are not limited to) these potential agreements:

1. **Coordinate on facilities planning.** If \_\_\_\_\_ School District prepares and adopts a 10-year school facility plan, the City of Portland will assist with population growth projections, cooperate in identifying land for school facilities, and include the school facility plan in the Portland Comprehensive Plan (as specified in ORS 195.110).
2. **Joint use.** This may include community uses in school buildings, school fields and grounds.
3. **Safe Routes.** Each school district can negotiate with the City of Portland to use the City's Safe Routes to School (SRTS) program as the primary mechanism to address student transportation safety concerns throughout the school district within the City of Portland.

### Confidentiality

In the interests of privacy, each party may condition the use and reporting of certain data by the other Party. Examples include English Language Proficiency assessment scores, other student records, employment insurance data of businesses, and real estate negotiations.

This Memorandum of Understanding is the complete agreement between the City of Portland and \_\_\_\_\_ School District, and may be amended only by written agreement signed by each of the parties involved. The MOU becomes effective from the date of both signatures. The Parties acknowledge that a Party may at any time wish to stop its involvement in this Memorandum of Understanding. Such termination shall be in writing to the other Party.



## ATTACHMENT B. School Facility Planning - a Checklist for Superintendents

State law (ORS 195.110) calls on cities and counties to work with large school districts (those with over 2,500 students) on school facilities plans. Since the City of Portland is in the process of updating its Comprehensive Plan, this is an opportune time for school district and City of Portland staff to confer and coordinate efforts.

This checklist provides an “at-a-glance” look at large school districts’ responsibilities to comply with ORS 195.110. Tasks in **bold \*** are active City roles.

In Progress	Completed	ORS 195.110 Tasks for School Districts
<input type="checkbox"/>	<input type="checkbox"/>	1. Project student enrollment (by school age group)
<input type="checkbox"/>	<input type="checkbox"/>	2. Determine school facility capacity (set criteria)
<input type="checkbox"/>	<input type="checkbox"/>	3. Assess building condition (& identify physical improvements needed to meet SD’s minimum standards)
<input type="checkbox"/>	<input type="checkbox"/>	4. Analyze alternatives to new school facility construction and major renovation, and measures to increase efficient use of school sites
<input type="checkbox"/>	<input type="checkbox"/>	<b>5. Identify school facility needs based on population growth projections and land use designations in Comprehensive Plan *</b>
<input type="checkbox"/>	<input type="checkbox"/>	6. Identify desirable school sites (as needed)
<input type="checkbox"/>	<input type="checkbox"/>	7. Provide financial plans to meet school facility needs (with tools)
<input type="checkbox"/>	<input type="checkbox"/>	8. Provide 10-year capital improvement plans
<input type="checkbox"/>	<input type="checkbox"/>	9. Provide site acquisition schedules and programs
<input type="checkbox"/>	<input type="checkbox"/>	<b>10. Analyze suitable land required for 10 years (permitted or conditional use, within UGB) *</b>
<input type="checkbox"/>	<input type="checkbox"/>	<b>11. Update school facility plan during city and/or county’s periodic review *</b>



## ATTACHMENT C. Status of David Douglas School District's Long Range Facilities Plan

The Oregon Department of Education has identified eleven tasks to complete and adopt a school facility plan. Large school districts are responsible for most tasks. The City of Portland (as the local land use agency) is responsible for Tasks 5, 10 and 11, shown with \*.

David Douglas School District is preparing a school facility plan. BPS staff participated in the five public meetings of DDSD's Facility Planning Citizen Committee, tasked with helping to shape the facility plan. This staff report was prepared before release of DDSD's Long Range Facilities Plan, and represents a status report. BPS intends to review the DDSD plan for completeness, and use feedback from the PSC to insert the DDSD plan into CP 2035.

- **Task 1 (DONE):** Project student enrollment (by school age group). PSU forecasts 1,300 more students by years 2033-34.
- **Task 2 (DONE):** Determine school facility capacity (set criteria). DDSD has discussed these targets, by grade level: 600 students at elementary school; 900 students at middle school; and 3,000 students at high school.
- **Task 3 (DONE):** Assess building condition (& identify physical improvements needed to meet SD's minimum standards). DDSD has assessed building condition, for its nine elementary schools, three middle schools, high school, and administrative facilities. DONE.
- **Task 4 (DONE):** Analyze alternatives to new school facility construction and major renovation, and measures to increase efficient use of school sites. DDSD has identified several no-build alternatives (adding portables, year-round schedule, online high school classes). Still, DDSD will need to build and rebuild schools to meet capacity and end overcrowding.
- **\* Task 5 (IN PROGRESS):** Identify school facility needs based on population growth projections and land use designations in Comprehensive Plan. DDSD projects school overcrowding to worsen over time. In June 2014, BPS provided housing allocations for the July 2014 CPU draft. With that data, DDSD made these projections about their nine elementary schools:
  - By 2018, four elementary schools will be over target capacity.
  - By 2033, six elementary schools will be over target capacity.

BPS will update the housing allocations with additional zoning changes to reduce housing density in DDSD.

- **Task 6 (IMMEDIATE NEED):** Identify desirable school sites (as needed). To date, DDSD has not identified desirable school sites. Recently, DDSD acquired property on NE Halsey for administrative offices, freeing up space on the high school campus.
- **Task 7 (IN PROGRESS):** Provide financial plans to meet school facility needs (with tools). In 2012, DDSD replaced its General Obligation bond levy, without increasing DDSD's property tax rate. The 2012 bond pays for the new Earl Boyles Early Child Education Center; plus roofing, flooring, HVAC and safety upgrades at other school facilities. In spring 2014, DDSD discussed options for future bond measures. A bond cap of \$3 per \$1,000 would leave many needed facility projects unfunded.



- **Task 8 (IN PROGRESS):** Provide 10-year capital improvement plans. The school facility plan committee did not recommend a specific CIP to address school capacity. DDSD has not shared a CIP with BPS.
- **Task 9 (UNKNOWN):** Provide site acquisition schedules and programs. To date, DDSD has not shared a site acquisition schedule and program with BPS.
- \* **Task 10 (NOT DONE):** Analyze suitable land required for 10 years (permitted or conditional use, within UGB). DDSD has not asked the City for this analysis.
- \* **Task 11 (DOES NOT APPLY):** Update school facility plan during city and/or county's periodic review. DDSD is completing its first school facility plan (no need to update an existing school facility plan).





## ATTACHMENT D. Housing Allocations by Elementary School in David Douglas School District

In June 2014, BPS projected new housing units, by type, for the plan year (2035). This chart shows existing housing units and two 2035 projections, for the nine elementary school in David Douglas School District. The chart shows about 9,000 fewer new housing units as a result of the July 2014 draft.

The term “default” uses current Comprehensive Plan map designations. The term “proposed” uses Comprehensive Plan map designations in the July 2014 proposed Comprehensive Plan.

On March 10, 2015, the Planning and Sustainability Commission will consider additional map changes affecting Residential Densities. To align with PSC feedback from that worksession, the housing projections, below, will be updated.

School	Existing Units	Year 2035 Projections					Proposed 2014 Minus Default
		Total Units (Default 2012)	New Single Dwellings (Proposed 2014)	New Multi Dwellings (Proposed 2014)	Combined New Units (Proposed 2014)	Total Units (Proposed 2014)	
CHERRY PARK ES	3,601	13,173	336	3,183	3,534	7,135	-6,038
EARL BOYLES ES	1,788	2,407	196	217	421	2,210	-197
GILBERT HEIGHTS ES	2,579	4,000	833	337	1,211	3,790	-210
GILBERT PARK ES	3,129	4,621	821	126	962	4,091	-530
LINCOLN PARK ES	2,509	3,590	528	292	845	3,353	-237
MENLO PARK ES	2,836	4,650	309	839	1,161	3,997	-653
MILL PARK ES	2,395	3,587	515	1,329	1,869	4,264	677
VENTURA PARK ES	3,149	6,613	402	1,084	1,522	4,671	-1,942
WEST POWELLHURST ES	2,271	3,448	623	487	1,136	3,407	-41
<b>TOTALS</b>	<b>24,258</b>	<b>46,089</b>	<b>4,562</b>	<b>7,895</b>	<b>12,660</b>	<b>36,918</b>	<b>-9,171</b>

Source: BPS Buildable Lands Allocation Model | 6.18.14



## ATTACHMENT E. Washington County Experience with School Service Letters

Like David Douglas School District (DDSD), Beaverton School District (BSD) is one of the fastest growing, large school districts in the state. BSD's 2010 plan estimated the need for an additional 42 to 90 acres for new schools in the district by 2025 (without portable classrooms) and from 56 to 130 acres (without portable classrooms). At that time, BSD identified the "upper bound" need for new sites to build three new elementary schools, one middle school, and either one new comprehensive high school site and two new Options schools or two new comprehensive high schools.

Since 2010, BSD has reduced its enrollment capacity gap through major bond-funded capital investments. In 2014, Beaverton voters approved a \$680 million bond measure. The 2014 Bond Program pays for capacity increases, modernization, and technology. Capacity actions seek to relieve crowding and provide for growth. At present, BSD is working to locate a new comprehensive high school, and continues to use a combination of attendance boundary adjustments and portable classrooms to address overcrowding.

In contrast, DDSD asserts that its voters would not likely approve a major new bond measure (big enough to expand facilities to meet projected enrollment capacity).

Since 2002, Beaverton School District has sent school service provider letters on to Washington County. BSD applies objective criteria based on building square footage. Washington County evaluates all legislative and quasi-judicial comprehensive plan amendments that will impact the planned density of residential land in BSD, and all residential land use regulation amendments, to determine their impact on District-wide school capacity.

### Policy direction

Both agencies committed to participate in the service provider process, by adopting these plans:

- Washington County Comprehensive Framework Plan for the Urban Area (1983)—defined schools as essential services, adopted a schools policy and adopted objective criteria for school capacity.
- Washington County zoning code—defined schools as essential services, and specified the documentation needed in service provider letters.
- Beaverton School District's School Facility Plan (1994, with updates in 2002 and 2010)—BSD adopted (and amended) a school facility plan to comply with ORS 195.110. The 2010 update recommended new schools for growing enrollment, building improvements, and acquiring new school sites, and weighing replacement vs. renovation of existing schools. Their immediate need was for a new high school.

BSD decided to update the 2002 Facility Plan, incorporating recent facility improvements, address new facility and enrollment information and maintain compliance with the requirements of ORS 195.110. Gresham-Barlow School District adopted a similar objective school capacity formula, in its 2012 Long Range Facility Plan.





## Bureau of Planning and Sustainability

Innovation. Collaboration. Practical Solutions.

**DATE:** February 11, 2015

**TO:** Planning and Sustainability Commission

**FROM:** Deborah Stein, Principal Planner; Bob Glascock, Senior Planner

**CC:** Susan Anderson, Director; Joe Zehnder, Chief Planner; Eric Engstrom, Principal Planner

**SUBJECT:** **School Capacity at David Douglas School District, February 24 PSC Work Session**

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This report focuses on the City's role in collaborating with David Douglas School District (DDSD) to address the district's school capacity challenges, in the context of the Comprehensive Plan. This report is intended to inform the Planning and Sustainability Commission work session on February 24, 2015.

### Testimony

Most testimony on this topic favored slowing housing growth in DDSD to relieve school overcrowding. By slowing housing growth, there may also be less pressure on overtaxed streets and other infrastructure. There is a recognition that most DDSD schools are already over capacity.

### Discussion Questions

1. **Schools/growth policy** — How do we best manage housing growth in areas of sustained school overcrowding (focusing on the David Douglas School District)?
2. **Search for school sites** — Should the City take a more active role in helping DDSD to find and acquire new school sites?

*\*NOTE: This report only addresses program-related actions to address school capacity at DDSD. Several mapping actions in DDSD will be addressed in the Residential Densities staff report for the March 10, 2015 PSC work session. For details, see Pages 7 and 8 of this report. Mapping actions include:*

- *Down-designations, particularly in Powellhurst-Gilbert, to address deficiencies in infrastructure and connectivity.*
- *Down-zonings (with no change to Comprehensive Plan map designations) to directly address DDSD's school capacity challenges.*



## Attachments

- A — Sample Intent to Collaborate on Schools.
- B — School Facility Planning – a Checklist for Superintendents.
- C — Status of David Douglas School District’s Long Range Facilities Plan.
- D — Housing Allocations by Elementary School in David Douglas School District, June 2014.
- E — Washington County Experience with School Service Letters.



## Background

### *Why is school capacity important to address through the Comprehensive Plan?*

- **Community context**—East Portland and overcrowded schools in DDSD.
- **Legal context**—ORS 195.110, last amended in 2007, allows for the District to influence decisions on residential development applications when objective criteria to determine whether adequate capacity exists have been adopted by the District and local jurisdictions.
- **Testimony**—DDSD and others in East Portland have requested that the City address DDSD school capacity issues.
- **Policy context**—Education and youth success is one of the cornerstones of the Portland Plan, which provides direction to the update of the city’s Comprehensive Plan.

### Community context

East Portland has experienced rapid growth in population and school enrollment. Multi-dwelling housing development has replaced low-density single dwellings in many locations since adoption of the Outer Southeast Community Plan in 1996. Average family size is larger than the citywide average. More students live in poverty, and nearly a hundred languages are spoken by students of David Douglas, Reynolds, Parkrose and Centennial school districts. This strains school district resources and makes it hard for school districts to provide the variety of services their diverse students deserve and demand.

The state of Oregon distributes income tax revenues to school districts based on the number of enrolled students. Property tax limitations (1990’s) capped local revenue to school districts. Most East Portland school districts, with increasing enrollment, receive more state funds for operations, but lack the capital (tax base) to fund new facilities.

Between 1996 and 2014, DDSD grew from 7,260 to 10,823 students. One projection is that DDSD could see an additional 6,000 students over the next 20 years (with current zoning). DDSD reports that several of its schools are above target enrollment (overcrowded). Most of its schools are projected to exceed target enrollment in the future. In testimony, DDSD says it may need two additional elementary schools, two K-8 schools, and one additional high school to accommodate the current projected growth.

The exception is Parkrose School District, which has upgraded its facilities with a successful bond measure. In May 2011, its voters approved a \$63 million bond package (replacing its middle school, renovating/adding onto four elementary schools, and districtwide technology, security, maintenance and repair). Parkrose School District reports excess capacity at its middle school.

### Legal context

In Oregon, the regulatory context for school facility planning rests with ORS 195.110. First adopted in 1993, the state legislature has since amended school facility planning statutes in 2001 and 2007. If a large school district adopts a school facility plan, the City must take three actions:

1. Include the plan in the City’s comprehensive plan.



2. Cooperate with the school district in identifying land for school facilities and take necessary actions, including imposing appropriate zoning or adding one or more sites for designated school facilities.
3. Accept and apply school districts' objective criteria (listed in a school facilities plan and used for determining whether adequate capacity exists to accommodate projected development). However, the City's obligation to use or apply these criteria is limited to two purposes: a) approving or denying applications for comprehensive plan amendments, and b) adopting amendments to "residential land use regulation[s]".

The City can deny an application for residential development based on the lack of school capacity if three elements are present:

1. The school district raises the issue of its lack of capacity.
2. The lack of capacity is based on a school facility plan formally adopted in compliance with state law.
3. The City has "considered options to address school capacity."

The school district must formally adopt a school facility plan, in order for the City to address the school district's capacity issues for land use purposes in its comprehensive plan and zoning code. This is a prerequisite to City actions on school capacity.

Portland Public Schools completed its school facility plan in 2012. DDSB has made substantial progress toward completing its school facility plan, and will likely adopt a plan in time for Comprehensive Plan implementation.

### Testimony

Testimony can be generally grouped into three categories:

1. *Supply (school capacity)*
  - a. The DDSB School Board Chair wrote, "Within the DDSB boundaries, there currently is not adequate land available to accommodate the additional facilities, nor does the District have the bonding capacity to fund the additional schools needed to accommodate the current projected growth."
  - b. A close-in resident opposes use of school capacity as a reason to downzone. The testifier asserts that the affected school district can use the additional funds it gets from extra pupils, to expand the schools.
2. *Demand (housing with school-age children)*
  - a. Leaders of David Douglas School District request that the Comprehensive Plan significantly reduce high-density housing in DDSB.
  - b. East Portland residents and a state representative for East Portland propose or support additional zoning changes to reduce residential density, citing limited school capacity (in DDSB) and lack of infrastructure (sidewalks, parks, community centers, connecting streets, crosswalks, etc.).
  - c. Neighbors or others (not necessarily from East Portland) support downzoning, in part to avoid school overcrowding/capacity pressures.
3. *Process (adoption, implementation)*



- a. Southwest residents cite state statutes (ORS 195.110, ORS 197.768) as requiring that the Comprehensive Plan include long range school facility plans (of large school districts) and holding public hearings for these plans. Portland Public Schools (PPS) has completed its school facility plan and DDSD is in the process.
- b. The Bureau of Development Services (BDS) asks that the Comprehensive Plan define “school facility plan” and its key components, if school district capacity is added to adequacy of services criterion for zoning map amendments. BDS wrote that school districts should be prepared to respond to individual land use review cases in a timely, site-specific way and explain how they determine adequacy of school facilities (in service letters).

### Policy context

During the Portland Plan process, school districts and the City agreed to partner to advance Thriving Educated Youth as an integrated strategy. Equity is also relevant for DDSD, with a highly diverse student population, high percent subsidized population (80% of families qualify for free or reduced-price school lunches), subsidized housing, and lagging job growth in East Portland.

Proposed Comprehensive Plan Goal 8.K., School Facilities, is adapted from Portland Plan guiding policy T-10. All Portlanders, not just students, can benefit as local school districts upgrade existing facilities and design new campuses to meet 21<sup>st</sup> century opportunities and challenges. Schools can serve as hubs for social gathering and physical as well as education (both formal and informal) for people of all generations, cultures and abilities—a concept strongly supported by “age-friendly city” advocates.

In developing the proposed Comprehensive Plan, BPS convened eight policy expert groups (PEGs) to discuss policy recommendations. The **Education & Youth Success** PEG reviewed Comprehensive Plan background materials and analyses to understand issues related to education / youth as addressed in the Comprehensive Plan. The Education and Youth Success PEG advised the City to:

- Link school-related enrollment, capacity and funding issues to City levers in managing growth. City levers include zoning, infrastructure improvements and incentives.
- Coordinate urban renewal and other public/private financial investments to benefit and support schools.
- Initiate closer, sustained coordination with all school districts. This includes, but is not limited to, tracking shifts in building activity and demographics related to school enrollment, and coordinating on shared use of recreational fields and planning for community uses in schools.

The proposed Comprehensive Plan recognizes that public schools are essential public facilities, even though the City of Portland is not an education service provider. The proposed Comprehensive Plan provides an avenue to include school facility plans and address a mismatch between housing growth and school capacity, in DDSD.



## ***Staff approach***

To develop this proposal, BPS staff followed these steps in collaborating with DDS:

1. Briefed the Superintendents' Council on several occasions. In May 2013, BPS staff previewed population growth forecasts for school districts in Portland. In November 2013, BPS staff identified school district and City roles in school facility plan process, as outlined by the Oregon Department of Education. See Attachment B for a task checklist for school districts and the City.
2. Participated in DDS's school facility plan process (five meetings between February and June 2014). See Attachment C for DDS's current status on the task checklist.
3. Prepared growth-related data for DDS to use in its plan process (June 2014). BPS provided Year 2035 housing allocation data by elementary school in DDS. See Attachment D.
4. Provided DDS with a fiscal impact analysis tool, for use in modeling different enrollment scenarios.
5. Researched methods to implement school capacity for zoning map amendments. See Attachment E for a summary of Washington County's experience with school service letters.

## **Discussion Question 1. How do we best manage housing growth in areas of sustained school overcrowding (focus on David Douglas School District)?**

### ***Potential City actions***

- A. Improve collaboration between DDS and the City of Portland.
- B. Provide development-related information.
- C. Add school capacity as a required public service for zoning map amendments.
- D. Change the Comprehensive Plan map and/or zoning map within DDS's boundaries to reduce the potential for additional housing development in DDS that would further strain the district's school capacity.





### **A: Improve collaboration between DDSD and the City of Portland.**

A range of possible collaboration activities between school districts and the City were discussed by the Education & Youth Success PEG. With this in mind, BPS has prepared a draft letter of intent to collaborate (see Attachment A of this report). The letter of intent can be tailored to the mutual interests of each school district and the City. The Memorandum of Understanding format allows the parties to enter into a voluntary agreement. The City would adopt each MOU by resolution, not by ordinance.

Collaborative activities may include designating liaisons for particular functions, seeking opportunities to leverage each others' community engagement processes, seeking opportunities to promote youth/adult partnerships, and sharing data and expertise of mutual interest. Spinoff binding agreements between a school district and the City may include coordination on school facilities planning; joint use of school buildings, school fields and grounds; and safe routes to schools. Binding agreements are typically adopted by ordinance, in the form of Intergovernmental Agreements (IGA's).

### **B: Provide development-related information.**

The Bureau of Development Services provides monthly development permit data to DDSD. Due to a software limitation, those monthly reports do not record the number of bedrooms in residential structures. BDS also sends DDSD notices of Type III land use cases. Potentially, BDS could send DDSD more land use notices (Type II and pre-application conferences). Information, alone, will not relieve DDSD of school overcrowding, but can enable the school district to comment on land use cases and anticipate localized growth in its school catchment areas.

### **C: Add school capacity as a required public service for approval of zoning map amendments.**

BPS staff has identified two Portland-area school districts that have adopted a) school facility plans and b) objective criteria to determine school capacity. In 2010, Beaverton School District amended its school facility plan, and added the objective criteria. In 2012, Gresham-Barlow School District adopted its school plan, with objective criteria based on Beaverton School District's formula. The formula is based on building area and a ratio of area per student. For the collaboration between Beaverton School District and Washington County, see Attachment D.

To activate a school service provider process, the City would need to include the school facility plan in the comprehensive plan, cooperate with the school district in identifying land for new school facilities, and accept the school district's objective criteria on school capacity. Then, ORS 195.110 allows the City to deny applications for two land use actions:

- Comprehensive plan amendments.
- Amendments to residential land use regulations.

The school service provider process would effectively add DDSD as a required service provider to approve certain zoning map amendment applications. Approval criteria for zoning map amendments (for a base zone change) are compliance with the Comprehensive Plan Map and adequate public services. BDS already sends to DDSD notices of Type III (mandatory hearing) reviews and monthly



development reports. Zoning map amendments are a Type III review. DDS, in turn, would need to send BDS a detailed service letter response within a 30-day window, confirming whether there is available school district capacity to serve the new residential units.

DDS may also want to receive all the notices that neighborhood associations receive, for land use applications in their boundaries. This would enable the school district to stay informed of potential new residential development that could place demands on school capacity. In early February, DDS administrators confirmed that they would commit administrative staff to make timely and detailed responses in school service provider letters.

### ***Other approaches***

According to the City Attorney, moratoria in Oregon based on school capacity are no longer legal. ORS 195.110(11), states, “The capacity of a school facility is not the basis for a development moratorium under ORS 197.505 to 197.540.” The City Attorney advises it is not possible under any circumstances for the City to adopt a moratorium based on the lack of school facilities—in David Douglas School District or any other school district within the City.

### **D: Change the Comprehensive Plan map and/or zoning map within DDS’s boundaries to reduce the potential for additional housing development in DDS that would further strain the district’s school capacity.**

There are two ways this approach can be implemented (listed below). Staff proposes a combination of these two approaches. More discussion and details will follow in the PSC’s March 10, 2015 work session (Residential Densities).

- i. **Change Comprehensive Plan map designations to decrease the potential for future residential development.** This has been proposed in portions of East Portland (particularly in the Powellhurst-Gilbert neighborhood) where there is a combination of infrastructure and connectivity deficiencies, including but not limited to school capacity. This action signals that during the planning period covered by the Comprehensive Plan (through 2035), residential densities that are allowed under today’s Comprehensive Plan are more intense than what the current and planned infrastructure (including school district capacity) can support.
- ii. **Retain current Comprehensive Plan map designations, but change zoning map designations to allow lower density residential development than is allowed today.** This is proposed in portions of David Douglas School District to address the district’s current capacity challenges. The retention of the Comprehensive Plan designation signals that once the current pressures are alleviated with new facilities and/or programmatic changes, the zoning can change through legislative or quasi-judicial zoning map changes to match the higher densities allowed by the Comprehensive Plan map designations. The presumption would be that the higher densities can be supported by infrastructure and connectivity long-term, but not in the short term. Properties



seeking a zone change would be subject to the school service letter process outlined in Potential City Action B, above.

**E: Adjust boundaries between school districts. The City has no direct role in this option.**

East Portland is served by several school districts, in addition to David Douglas. To the north is Parkrose School District. Centennial School District (which serves Portland and Gresham) and Reynolds School District (which serves Portland, Gresham, Fairview, Wood Village and Troutdale) are located to the east. To the west is Portland Public Schools (which encompasses a portion of Lents and Powellhurst-Gilbert just east of I-205).

Each school district has decision-making autonomy and addresses fiscal, facilities and enrollment issues (among others) under the direction of its elected school board. Superintendents from all Multnomah County school districts meet monthly as a Superintendents Council to coordinate, share information and problem-solve about issues of mutual interest and concern. The City has been invited to provide information to the Superintendents' Council and, if invited, could help to facilitate conversations between school districts, but has no authority to weigh in on the boundaries between school districts.

## **Discussion Question 2. Should the City take a more active role in helping DDSD to find and acquire new school sites?**

### ***Potential City actions***

- A. Confirm suitable land for school sites in DDSD. This is the minimum legal requirement.
- B. Facilitate safe access to schools.
- C. Make or facilitate other capital improvements that benefit DDSD schools.



**A: Confirm suitable land for school sites in DDSD. This is the minimum legal requirement.**

During the school facility planning process, DDSD identified acquiring new school sites as an immediate priority. Since June 2014, DDSD has acquired a commercial site to relocate its administrative offices from the high school campus.

To date, DDSD has not asked the City to evaluate specific properties as potential new school sites.

Generally, public schools are allowed by right in mixed use and employment zones and as conditional uses in residential zones. Schools are prohibited in industrial zones. (Note that the new Campus Institution designation is proposed for all public high schools in Portland as part of the proposed Comprehensive Plan. This designation is also proposed for private high schools over ten acres in size. At this time, no zone changes are proposed on any school campus irrespective of Comprehensive Plan designation.)

**B: Facilitate safe access to schools.**

DDSD is a partner to the City’s Safe Routes to Schools program. Several of the DDSD school facilities have been evaluated for safe access, and some safe routes improvements have been identified. Safe Routes to School is an ongoing program identified within the Transportation System Plan.

**C: Make other capital improvements that benefit DDSD schools.**

The PSC will consider priority transportation projects in the TSP. Other City services are outlined in the Citywide Systems Plan. Project-by-project investment decisions are made with the annual City budget process. Regardless of funding responsibility, the City may identify specific growth-related capital improvement needs identified by our partner agencies within the CSP as a means to elevate their importance. Inclusion of DDSD facilities in the citywide CSP project list does not translate directly to funding, but may be a way to memorialize the need for facility related coordination.

The Portland Plan includes an action item to “Develop a funding Strategy for the Gateway Education Center as a partnership of Parkrose and David Douglas school districts, Mount Hood Community College, Portland State University, and the City of Portland” (5-year Action #48). Noting this action item in the CSP may be a way to communicate the City’s interest in advancing the DDSD facilities discussion.

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## ATTACHMENTS

- A — Sample Intent to Collaborate on Schools.
- B — School Facility Planning – a Checklist for Superintendents.
- C — Status of David Douglas School District’s Long Range Facilities Plan.
- D — Housing Allocations by Elementary School in David Douglas School District, June 2014.
- E — Washington County Experience with School Service Letters.



## ATTACHMENT A. Sample Intent to Collaborate on Schools

### City of Portland and \_\_\_\_\_ School District Collaboration Memorandum of Understanding

This Memorandum of Understanding serves to forge a productive and sustainable relationship between the City of Portland, Oregon and \_\_\_\_\_ School District.

- The City of Portland provides urban services and strives to improve the quality of life for citizens and visitors.
- \_\_\_\_\_ School District has served the East Portland Community for well over a century. It has \_\_\_\_ schools serving approximately \_\_\_\_ students.

#### Purpose

Portland's overarching goal is to be a prosperous, educated, healthy and equitable city. To accomplish this, public agencies and others should look for opportunities to collaborate. Each Party's decisions and actions affect each other directly and indirectly, so it is vital to consult and coordinate on an ongoing basis.

Both Parties promote cooperation, friendly relationships and mutual benefit, while respecting each other's missions and decision-making authority.

The community benefits when the City partners with school districts on school facility planning and siting. By encouraging school facilities to be multi-functional neighborhood anchors, designed and programmed to serve community members of all generations and abilities, these policies also help implement the concept of Portland as an age-friendly city.

This MOU sets a framework, but does not legally obligate any party.

#### Collaborative Activities

1. **Find connections between the Parties' missions, and consult early.**
  - a. City agrees to consult with school districts at early stages of such activities as significant Comprehensive Plan changes, tax exemption programs, bond measures or levies on ballot, significant infrastructure decisions, Portland Parks & Recreation master plans, and community uses in school facilities.
  - b. \_\_\_\_\_ School District agrees to consult with the City at early stages of such activities as boundary changes, reconfigurations, bond measures or levies on ballot, facilities planning/major upgrades or rebuild projects, and community uses in school facilities.
2. **Clear and timely communication.**
  - a. Designate liaison(s) for particular functions, to build relationships and enable efficient and timely information-sharing.
  - b. Establish systematic communication channels and protocols.
  - c. Consult at appropriate levels within each organization.
  - d. Consider use of existing forums, such as Superintendents' Council, to share information.



3. **Seek opportunities to leverage each others' community engagement processes, to expand audience and be inclusive.**
  - a. City engages the public, formally and informally, on City services and development issues.
  - b. \_\_\_\_\_ School District engages the school community through its school board and committees as well as parent-teacher organizations at school sites.
4. **Seek opportunities to promote youth/adult partnerships.**
  - a. Promote student participation in community affairs.
  - b. Promote opportunities for mentorships, student job shadowing and career development.
5. **Share data and expertise.**
  - a. City may provide data on population forecasts, demographics, land use and transportation, and infrastructure asset management.
  - b. \_\_\_\_\_ School District may provide data on school facilities (use and condition), community uses in those facilities, enrollment projections, student transportation, languages used, and access to technology.
6. **Shared advocacy.**
7. **What do we do if we disagree on policies or practices?**

### Potential Agreements

With this framework, the City of Portland and \_\_\_\_\_ School District may pursue legally-binding agreements. Examples include (but are not limited to) these potential agreements:

1. **Coordinate on facilities planning.** If \_\_\_\_\_ School District prepares and adopts a 10-year school facility plan, the City of Portland will assist with population growth projections, cooperate in identifying land for school facilities, and include the school facility plan in the Portland Comprehensive Plan (as specified in ORS 195.110).
2. **Joint use.** This may include community uses in school buildings, school fields and grounds.
3. **Safe Routes.** Each school district can negotiate with the City of Portland to use the City's Safe Routes to School (SRTS) program as the primary mechanism to address student transportation safety concerns throughout the school district within the City of Portland.

### Confidentiality

In the interests of privacy, each party may condition the use and reporting of certain data by the other Party. Examples include English Language Proficiency assessment scores, other student records, employment insurance data of businesses, and real estate negotiations.

This Memorandum of Understanding is the complete agreement between the City of Portland and \_\_\_\_\_ School District, and may be amended only by written agreement signed by each of the parties involved. The MOU becomes effective from the date of both signatures. The Parties acknowledge that a Party may at any time wish to stop its involvement in this Memorandum of Understanding. Such termination shall be in writing to the other Party.



## ATTACHMENT B. School Facility Planning - a Checklist for Superintendents

State law (ORS 195.110) calls on cities and counties to work with large school districts (those with over 2,500 students) on school facilities plans. Since the City of Portland is in the process of updating its Comprehensive Plan, this is an opportune time for school district and City of Portland staff to confer and coordinate efforts.

This checklist provides an “at-a-glance” look at large school districts’ responsibilities to comply with ORS 195.110. Tasks in **bold \*** are active City roles.

In Progress	Completed	ORS 195.110 Tasks for School Districts
<input type="checkbox"/>	<input type="checkbox"/>	1. Project student enrollment (by school age group)
<input type="checkbox"/>	<input type="checkbox"/>	2. Determine school facility capacity (set criteria)
<input type="checkbox"/>	<input type="checkbox"/>	3. Assess building condition (& identify physical improvements needed to meet SD’s minimum standards)
<input type="checkbox"/>	<input type="checkbox"/>	4. Analyze alternatives to new school facility construction and major renovation, and measures to increase efficient use of school sites
<input type="checkbox"/>	<input type="checkbox"/>	<b>5. Identify school facility needs based on population growth projections and land use designations in Comprehensive Plan *</b>
<input type="checkbox"/>	<input type="checkbox"/>	6. Identify desirable school sites (as needed)
<input type="checkbox"/>	<input type="checkbox"/>	7. Provide financial plans to meet school facility needs (with tools)
<input type="checkbox"/>	<input type="checkbox"/>	8. Provide 10-year capital improvement plans
<input type="checkbox"/>	<input type="checkbox"/>	9. Provide site acquisition schedules and programs
<input type="checkbox"/>	<input type="checkbox"/>	<b>10. Analyze suitable land required for 10 years (permitted or conditional use, within UGB) *</b>
<input type="checkbox"/>	<input type="checkbox"/>	<b>11. Update school facility plan during city and/or county’s periodic review *</b>





## ATTACHMENT C. Status of David Douglas School District's Long Range Facilities Plan

The Oregon Department of Education has identified eleven tasks to complete and adopt a school facility plan. Large school districts are responsible for most tasks. The City of Portland (as the local land use agency) is responsible for Tasks 5, 10 and 11, shown with \*.

David Douglas School District is preparing a school facility plan. BPS staff participated in the five public meetings of DDSD's Facility Planning Citizen Committee, tasked with helping to shape the facility plan. This staff report was prepared before release of DDSD's Long Range Facilities Plan, and represents a status report. BPS intends to review the DDSD plan for completeness, and use feedback from the PSC to insert the DDSD plan into CP 2035.

- **Task 1 (DONE):** Project student enrollment (by school age group). PSU forecasts 1,300 more students by years 2033-34.
- **Task 2 (DONE):** Determine school facility capacity (set criteria). DDSD has discussed these targets, by grade level: 600 students at elementary school; 900 students at middle school; and 3,000 students at high school.
- **Task 3 (DONE):** Assess building condition (& identify physical improvements needed to meet SD's minimum standards). DDSD has assessed building condition, for its nine elementary schools, three middle schools, high school, and administrative facilities. DONE.
- **Task 4 (DONE):** Analyze alternatives to new school facility construction and major renovation, and measures to increase efficient use of school sites. DDSD has identified several no-build alternatives (adding portables, year-round schedule, online high school classes). Still, DDSD will need to build and rebuild schools to meet capacity and end overcrowding.
- **\* Task 5 (IN PROGRESS):** Identify school facility needs based on population growth projections and land use designations in Comprehensive Plan. DDSD projects school overcrowding to worsen over time. In June 2014, BPS provided housing allocations for the July 2014 CPU draft. With that data, DDSD made these projections about their nine elementary schools:
  - By 2018, four elementary schools will be over target capacity.
  - By 2033, six elementary schools will be over target capacity.

BPS will update the housing allocations with additional zoning changes to reduce housing density in DDSD.

- **Task 6 (IMMEDIATE NEED):** Identify desirable school sites (as needed). To date, DDSD has not identified desirable school sites. Recently, DDSD acquired property on NE Halsey for administrative offices, freeing up space on the high school campus.
- **Task 7 (IN PROGRESS):** Provide financial plans to meet school facility needs (with tools). In 2012, DDSD replaced its General Obligation bond levy, without increasing DDSD's property tax rate. The 2012 bond pays for the new Earl Boyles Early Child Education Center; plus roofing, flooring, HVAC and safety upgrades at other school facilities. In spring 2014, DDSD discussed options for future bond measures. A bond cap of \$3 per \$1,000 would leave many needed facility projects unfunded.



- **Task 8 (IN PROGRESS):** Provide 10-year capital improvement plans. The school facility plan committee did not recommend a specific CIP to address school capacity. DDSD has not shared a CIP with BPS.
- **Task 9 (UNKNOWN):** Provide site acquisition schedules and programs. To date, DDSD has not shared a site acquisition schedule and program with BPS.
- **\* Task 10 (NOT DONE):** Analyze suitable land required for 10 years (permitted or conditional use, within UGB). DDSD has not asked the City for this analysis.
- **\* Task 11 (DOES NOT APPLY):** Update school facility plan during city and/or county's periodic review. DDSD is completing its first school facility plan (no need to update an existing school facility plan).



## ATTACHMENT D. Housing Allocations by Elementary School in David Douglas School District

In June 2014, BPS projected new housing units, by type, for the plan year (2035). This chart shows existing housing units and two 2035 projections, for the nine elementary school in David Douglas School District. The chart shows about 9,000 fewer new housing units as a result of the July 2014 draft.

The term “default” uses current Comprehensive Plan map designations. The term “proposed” uses Comprehensive Plan map designations in the July 2014 proposed Comprehensive Plan.

On March 10, 2015, the Planning and Sustainability Commission will consider additional map changes affecting Residential Densities. To align with PSC feedback from that worksession, the housing projections, below, will be updated.

School	Existing Units	Year 2035 Projections					Proposed 2014 Minus Default
		Total Units (Default 2012)	New Single Dwellings (Proposed 2014)	New Multi Dwellings (Proposed 2014)	Combined New Units (Proposed 2014)	Total Units (Proposed 2014)	
CHERRY PARK ES	3,601	13,173	336	3,183	3,534	7,135	-6,038
EARL BOYLES ES	1,788	2,407	196	217	421	2,210	-197
GILBERT HEIGHTS ES	2,579	4,000	833	337	1,211	3,790	-210
GILBERT PARK ES	3,129	4,621	821	126	962	4,091	-530
LINCOLN PARK ES	2,509	3,590	528	292	845	3,353	-237
MENLO PARK ES	2,836	4,650	309	839	1,161	3,997	-653
MILL PARK ES	2,395	3,587	515	1,329	1,869	4,264	677
VENTURA PARK ES	3,149	6,613	402	1,084	1,522	4,671	-1,942
WEST POWELLHURST ES	2,271	3,448	623	487	1,136	3,407	-41
<b>TOTALS</b>	<b>24,258</b>	<b>46,089</b>	<b>4,562</b>	<b>7,895</b>	<b>12,660</b>	<b>36,918</b>	<b>-9,171</b>

Source: BPS Buildable Lands Allocation Model | 6.18.14



## ATTACHMENT E. Washington County Experience with School Service Letters

Like David Douglas School District (DDSD), Beaverton School District (BSD) is one of the fastest growing, large school districts in the state. BSD's 2010 plan estimated the need for an additional 42 to 90 acres for new schools in the district by 2025 (without portable classrooms) and from 56 to 130 acres (without portable classrooms). At that time, BSD identified the "upper bound" need for new sites to build three new elementary schools, one middle school, and either one new comprehensive high school site and two new Options schools or two new comprehensive high schools.

Since 2010, BSD has reduced its enrollment capacity gap through major bond-funded capital investments. In 2014, Beaverton voters approved a \$680 million bond measure. The 2014 Bond Program pays for capacity increases, modernization, and technology. Capacity actions seek to relieve crowding and provide for growth. At present, BSD is working to locate a new comprehensive high school, and continues to use a combination of attendance boundary adjustments and portable classrooms to address overcrowding.

In contrast, DDSD asserts that its voters would not likely approve a major new bond measure (big enough to expand facilities to meet projected enrollment capacity).

Since 2002, Beaverton School District has sent school service provider letters on to Washington County. BSD applies objective criteria based on building square footage. Washington County evaluates all legislative and quasi-judicial comprehensive plan amendments that will impact the planned density of residential land in BSD, and all residential land use regulation amendments, to determine their impact on District-wide school capacity.

### Policy direction

Both agencies committed to participate in the service provider process, by adopting these plans:

- Washington County Comprehensive Framework Plan for the Urban Area (1983)—defined schools as essential services, adopted a schools policy and adopted objective criteria for school capacity.
- Washington County zoning code—defined schools as essential services, and specified the documentation needed in service provider letters.
- Beaverton School District's School Facility Plan (1994, with updates in 2002 and 2010)—BSD adopted (and amended) a school facility plan to comply with ORS 195.110. The 2010 update recommended new schools for growing enrollment, building improvements, and acquiring new school sites, and weighing replacement vs. renovation of existing schools. Their immediate need was for a new high school.

BSD decided to update the 2002 Facility Plan, incorporating recent facility improvements, address new facility and enrollment information and maintain compliance with the requirements of ORS 195.110. Gresham-Barlow School District adopted a similar objective school capacity formula, in its 2012 Long Range Facility Plan.

