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# The Balancing Act: A Look at Dynamic School District Boundaries

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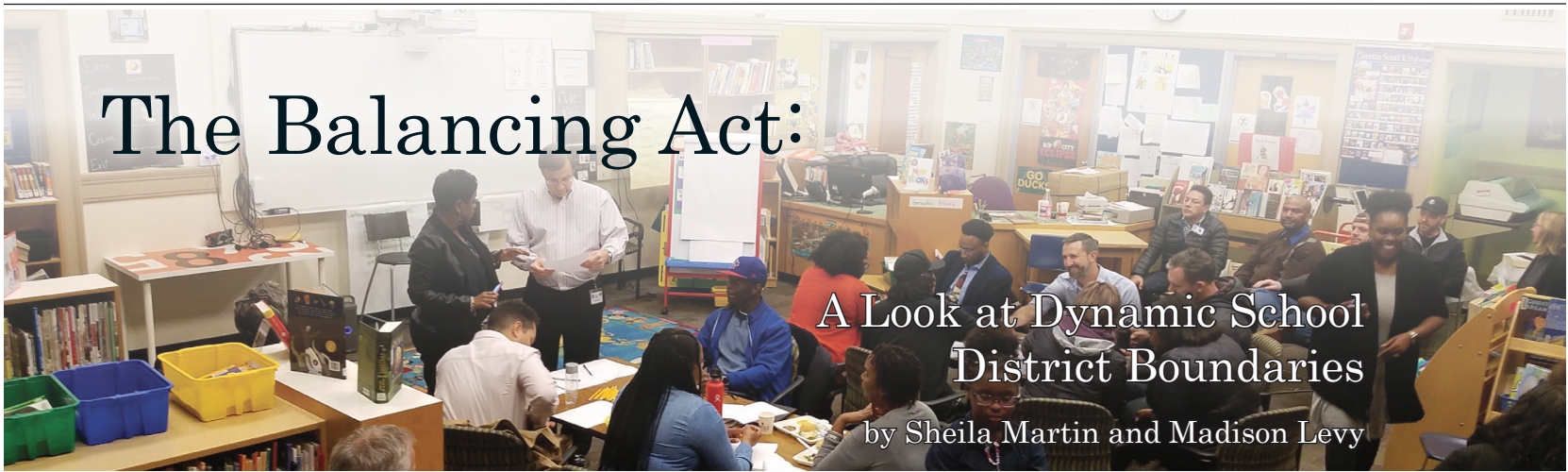
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# The Balancing Act:

## A Look at Dynamic School District Boundaries

by Sheila Martin and Madison Levy

*Harriet Tubman Middle School meeting at Boise Elliot Elementary School by Jon Weatherford*

**How do school districts throughout the Portland region respond to changes in student populations that cause overcrowding or under enrollment? In this article, we explore some of the key trends in school enrollment, describe the challenges faced by some of the districts in the region, and describe how different districts address those challenges.**

### **Why do districts need to adjust boundaries?**

Mary Peveto, a parent of a child at Chapman Elementary School in Northwest Portland, took the microphone at a community meeting at West Sylvan Middle School on November 16, 2015. “Last year, my daughter was one of forty-eight children who were placed in a basement room with two teachers.” Citing disruptions and chaos, she expressed disappointment that the district’s proposed changes to the Chapman boundary would, in her opinion, do very little to reduce the overcrowding at the school.

Meanwhile, in Northeast Portland, parents of children at Scott Elementary School are bemoaning the lack of programs for the middle-school-aged students. Because Scott is a small K-8 school--there were only 112 students in the sixth through eighth grades last year--the number of electives that can be offered is limited.<sup>1</sup> Nevertheless, the school building, which offers both a Spanish immersion program and a neighborhood program, is overcrowded with too few classrooms to accommodate the number of teachers required by the funding formula. Nicole Iroz Elardo, a Scott School parent, notes that the neighborhood program is limited to one “strand,” or classroom, per grade, which severely limits learning options: “Providing a robust two-class-per-grade program without reducing resources elsewhere, such as music or reading specialists, will require no less than forty-two neighborhood students in each grade from day one of the 2018–19 school year. Portland Public Schools should be aiming for 500 students minimum at Scott School.”

Two years earlier, across the region in Oak Grove, the North Clackamas School Board voted to close Concord Elementary due to costly seismic upgrades. The district’s budget shortfalls and the school’s shrinking enrollment made it difficult to justify the expense. But that doesn’t mean it was easy. “The process that led to closing Concord was very emotional,” says Tiffany Sherman, Chief of Staff of North Clackamas School District, who was Assistant Superintendent for Education

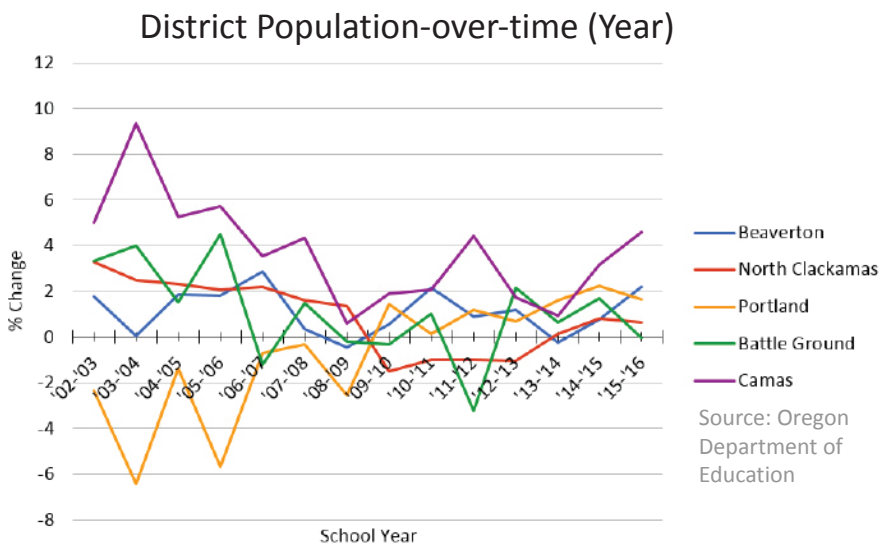
1. On average, middle schools in the Portland Public Schools system (PPS) offer sixteen exploratory courses, while some of the smallest K-8s offer as few as four. (Source: PPS, Office of System Planning and Performance.)

at the time. “Everyone has a stake in the outcome, and they know what it will mean for their family.” Moving forward, the district is facing rapid growth on their east side. In 2016, voters passed a bond measure that will allow North Clackamas to build and open a new elementary school and a new high school. Opening and filling these new buildings will require changes to existing boundaries for many of the other schools in the district. According to Sherman, “A district boundary realignment process should ensure strong neighborhood schools that reflect the demographics of the overall community. Every school must provide each student academically rich and consistent opportunities for learning.”

that others do not. And a partially empty building represents a waste of the district’s facilities, particularly if there are other schools that are overcrowded.

Districts employ a variety of tools to address over- and under-enrollment situations. Those tools include

- adjusting policies that allow students to transfer to/from a neighborhood school to a different school, either within or outside the district;
- creating or expanding programs that offer alternatives to traditional neighborhood schools (sometimes called choice or magnet schools);



- expanding alternative programs that serve students who meet certain criteria and aren’t well-served in traditional school settings, for example, programs for talented and gifted students;

- changing school attendance areas (also known as school boundaries);

- offering, expanding, or moving programs such as those for special education students or dual-

language immersion;

- adding capacity through facilities changes such as building portable classrooms or converting other space to classrooms;
- restructuring delivery of instruction, for example, changing grade configuration, staggering school hours, or sending students to off-site programs for part of the school day; and
- building new schools or closing an existing school.

*Select School Districts are included to represent districts with recent boundary changes and a mix of geography and size in the Portland Metro Region.*

These examples illustrate several situations that may lead to an enrollment rebalancing effort. Under enrollment can also be a big problem for school districts. A shrinking school population can mean that schools obtain less funding, limiting the programs that can be offered to students. This can lead to a situation that may be considered unfair if some district students have access to classes, programs, and resources

These tools can be used individually, but are usually used in some combination. For example, as schools become overcrowded or under enrolled, a boundary change might be combined with a change in transfer policy. The need to use these tools arises, in part, due to our tradition of neighborhood schools and using a student's address to determine what school they will attend. There are alternatives to this method of assigning students, which we will address later, but, first, let's discuss how schools in the metro area typically deal with the need to balance enrollment.

### **Objectives of enrollment balancing: Right-sized schools and program equity**

#### *What is a right-sized school?*

The definition of school capacity is fluid. Generally, schools are considered over enrolled if they do not have sufficient capacity to meet the needs of students.

Funding for each school is often determined by the number of students attending, which determines the quantity of teachers, which determines the number of classrooms needed. The calculation is more complex when you consider other factors, like the presence of special needs or English language learners who require extra classrooms, or at least meeting spaces, to accommodate the specialized programs.

Schools can increase their capacity by renting or purchasing portable classrooms or reallocating non-classroom spaces, such as cafeterias and library space, to classrooms. Converting these spaces to classrooms causes other problems, such as multiple lunch periods, cramped library quarters, or a lack of assembly space.

Schools that have too few students also face important challenges. Because money follows students, a school that has too few students will not be able to offer electives and other enrichments that larger schools

can fund. Such budget pressures may force a change in the structure of a building, for example, requiring larger classes.

New school or program options might also cause a school to become out of balance. An extremely popular magnet or immersion program might draw students into or out of a school disproportionately. Policies related to transfers, including transfers into the district, can be used to offset some of these shifts by making it more or less difficult to attend a school other than the neighborhood school.

The way in which buildings are used can also change the student capacity of a facility. For example, a shift to a more science- or arts-based curriculum might require more lab or performance spaces, thereby squeezing classrooms.

Changes in staffing ratios can also change the capacity of a facility. Washington State's Class Size Reduction Measure, Initiative 1351, requires reducing class sizes, especially in the lower grades. Efforts to reduce class sizes require more classrooms.

#### *School facilities planning*

To stay ahead of enrollment changes, schools typically forecast school enrollment by school attendance area, taking into account factors such as the birth rates, in- and out-migration, and expected new housing developments in the area. The Population Research Center at Portland State University works with many school districts to perform these forecasts.

School enrollment forecasts help school districts anticipate the need for new capacity (or excess capacity), but that doesn't mean that adapting schools to meet that need is easy. According to Judy Brennan, Director of Enrollment Planning for Portland Public Schools, adjustments are made every year to accommodate small changes in enrollment. Many of these changes are not even noticed by the students or their parents, like a small

facility or program change.

But when rapid growth or decline or big shifts in program preference occur, schools may become sufficiently out of balance to require larger and more difficult changes. And according to all the officials we interviewed, changing boundaries, closing schools, and building new schools are incredibly challenging in their own ways.

### Changing school boundaries

Boundary realignment processes are usually based upon a set of board policies that govern the rules for determining what children attend which schools. Some school boards also adopt goals for boundary changes at the start of a process. Then they will often convey those goals to an advisory committee and allow that committee to work with school district staff to develop recommendations for the superintendent or directly for the board. Finally, the board will consider the recommendation and either make its own changes to the recommendations or adopt them as proposed.

As school officials change school boundaries, they often employ many of the other available

enrollment balancing tools to make the numbers work. For example, a school board might change their transfer policies or they might change the feeder patterns that determine which elementary schools feed into middle and high schools.

Despite their efforts to balance the interests of multiple stakeholders, school leaders rarely complete a boundary change process

without a great deal of contention. “Boundary adjustment processes are acutely painful,” says Robert McCracken, Facilities Planning Coordinator of the Beaverton School District. “There is a great deal of disruption, and parents believe that they have a right to attend the school that their address was assigned to when they moved into their house.” In response to these complaints, districts often allow grandfathering of existing school assignments for students who would otherwise be reassigned. This means the boundary changes don’t have a very big impact until the grandfathered students graduate.

### Building new schools

Changing boundaries can only do so much to address overcrowding. With the steep rise in school enrollment for many districts, the only solution is to build new schools. And often, the barriers to building new schools can be daunting. The most difficult barrier, of course, is finding the money.

In Oregon and Washington, local school districts largely fund school construction and renovation with local, voter-approved bonds. In addition, school districts may impose a construction excise tax on construction projects that result in a new structure or additional square footage in an existing structure. In some cases, the state provides a small amount of matching funds through the Oregon School Capital Improvement Matching Program. In Washington, a statewide school construction assistance program (SCAP) provides partial funding for school construction and renovation. Funded from revenues on state forest land, the SCAP will partner with local districts to supplement local bond funding for school construction and renovation.

But passing bond measures and obtaining state match can be difficult. While Portland, Vancouver, Camas, Beaverton, North Clackamas, Lake Oswego, and other districts have recently held successful bond measure elections, voters have rejected bond mea-

### Schools and land use plans

*For schools on the Oregon side of the Columbia River, cities and counties are required by state law to coordinate with school districts in planning for their new facilities.<sup>1</sup> The local government is required to include a school facility plan, prepared by the district in consultation with the city or county, as an element of its comprehensive plan. Similarly, in Washington, cities and counties are required to plan for schools, and must locate them inside of urban growth areas.<sup>2</sup>*

1. ORS 195.110

2. RCW 36.70A

tures in other districts in the region, most recently in Molalla, Corbett, Battle Ground, and Centennial. And some Washington school officials find the state matching fund process limits their ability to plan efficiently when enrollment growth is projected. Doreen McKercher, Camas School District's Communications Director, and Linda Gellings, Battle Ground School District's Director of Business and Risk Management, both express frustration with the timing of this process. Because they must demonstrate that schools are already overcrowded, funding can't help them get ahead of enrollment increases.

### **What if students were assigned to schools based on other factors aside from their address?**

When we discuss school boundaries and balancing school enrollment, we are generally talking about neighborhood schools. But there are other systems for determining where students attend school.

Some districts have used a process of individual school assignment to balance enrollment. That is, rather than a student being assigned to a school determined directly by their address, some other set of criteria is used to determine which school a student might attend. These criteria might include distance from the school, school capacity, and the student (and parental) preference.

Portland Public Schools has expressed interest in a version of individual school assignment, called the "Soft Neighborhood Model."<sup>2</sup> This model, which is still being tested with actual student data, would eschew hard boundaries in favor of a system of student assignment that would take into consideration the capacity of school buildings as well as the distances between

students' homes and schools. Siblings are grouped together; thus families are assigned to one of several nearby schools. The system would prevent the phenomenon of under-enrolled schools next to over-enrolled schools by equalizing enrollment per classroom, per grade, and across schools within the schools' capacity constraints.

The creators of this model, Brooke Cowan and Matt Marjanović, believe the Soft Neighborhood Model will promote greater equity by breaking the link between a student's address and their school. They believe the system quells the urge to crowd close to a "good school" driving up rents and property values and gentrifying lower income students out. At the same time, they believe, the Soft Neighborhood Model promotes neighborhoods and family connectivity. Neighbors who live close to each other are all going to the same set of schools, rather than being separated by a hard boundary. The idea also promotes stability and consistency because boundaries don't constantly have to be tweaked each time enrollments are a little different than predicted. Marjanović notes, "Despite the illusion of stability, hard boundaries create unstable systems. The Soft Neighborhood Model eliminates the boundaries while preserving the desirable traits of traditional neighborhood schools."

Many details about how the Soft Neighborhood Model might be implemented have yet to be discussed. But the idea is catching on among parents and school leaders who are weary from the political battles of boundary change. Portland Public Schools is working with Dr. Cowan and Dr. Marjanović to provide them the data they need to conduct a full simulation of the effect of the model over several years of implementation.

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2. Brooke Cowan and Matt Marjanović, "The Soft Neighborhood Model: A Dynamic Enrollment-Balancing Framework." (March 7, 2016, v 3.1), <http://www.softneighborhoodmodel.org/soft-neighborhoods-current.pdf>

*"Also troubling was the difference in student access to courses such as advanced math, physics, and advanced placement courses."*

### **Race, socioeconomics and school boundaries**

Some of the tension around our discussion of school boundary changes stems from national and local history of school segregation, desegregation and resegregation. Last year, the US Government Accountability Office (GAO) released a report that detailed its findings about racial and income segregation in the nation's schools over time. The GAO found that, nationwide, the number of K-12 public schools with high percentages of poor and Black or Hispanic students (rather than being racially mixed) grew from 9 percent in 2000–2001 to 16 percent in 2013–2014. Also troubling was the difference in student access to courses such as advanced math, physics, and advanced placement courses.

While the average number of exploratory courses offered in PPS middle schools is sixteen, many K-8 schools in North and Northeast Portland have so few students in the middle grades that they offer many fewer, and those that offer the fewest electives are also schools with high minority populations, such as Lee elementary, with a school population that is 70 percent students of color, and Martin Luther King, Jr., with 88 percent students of color, based on the 2015–2016 report card. PPS has taken steps to provide the resources needed to improve program equity during the interim period prior to the implementation of boundary changes.

But advocates maintain that the middle schools need to open to improve equity. Jason Trombley, co-chair of PPS's District-wide Boundary Review Advisory Committee (DBRAC), warns that delaying can have adverse lifelong impacts on students of color. "Maintaining low-enrolled K-8 schools located in low-income communities or African American communities limits access to academic programs and electives to our students of color. These programs, such as career and technical education and exploratory courses are the foundational courses they need to succeed in the future, especially in an era where we are working to improve success in college and career."

### **Conclusion**

"Balancing enrollment is ultimately about student success," says Pam Kislak, co-chair of DBRAC. "Beyond the number of students attending the school, we also need to consider multiple complicating factors, such as avoiding concentrating poverty." Our desire to provide all students with quality schools, a comfortable, welcoming environment and strong academic offerings collides with our financial and physical constraints. Director Scott Bailey expresses that, for Portland Public Schools, "balancing enrollment can be challenging even when school districts are on top of their game. In the case of Portland Public Schools, we're trying to redraw boundaries after decades of neglect, while at the same time addressing equity issues by reconfiguring schools and expanding dual-language immersion programs. Gentrification and increasing housing segregation have not made our task any easier. There are a lot of moving parts, with very limited funding to deal with facilities issues that come up."

As schools throughout the region continue to struggle with striking the right balance, they will need to pursue innovative solutions while balancing stakeholder interests. The balancing act continues.

*Madison Levy found her way into planning through a passion for local government, love of data management, and a desire to create equitable public spaces. Madison's work as a researcher and as a leader in her program has recently been acknowledged by APA, APTA, and WTS.*

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