



Equity Funding has not closed the racial achievement gap in Portland Schools

By Ethan Rohrbach
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Non-white students have historically performed worse in Portland schools than white students. Knowing this, Portland Public Schools (PPS) announced in 2011 that:

Closing this achievement gap while raising achievement for all students is the top priority of the Board of Education, the Superintendent and all district staff. Race must cease to be a predictor of student achievement and success.¹

To attain this goal, the district was to “provide every student with equitable access to high quality and culturally relevant instruction...even when this means differentiating resources to accomplish this goal.”

With this policy adoption, the District intended to spend more in schools where academic achievement was low. This spending differential would be referred to as “equity funding.”

The primary purpose of the extra money would be to hire additional fulltime equivalent (FTE) staff, known as “Equity FTE.” Additionally, the district would improve instructional training for teachers to address racial disparities.

The Racial Educational Equity Policy, introduced in 2011, required the Superintendent to produce “action plans,” annual reports with information on financing to “identify specific staff leads on all key work, and include clear procedures for district schools and staff.”² The Equity Action Plan for each school was presented as a continuum of steps, and each school checked annually where it fell along the continuum. School staff were to see that “Leadership is trained” and form an equity team to “engage in structured dialogue about race to build racial awareness.”

The action plan is third in a series of paperwork, collectively called a School Improvement Plan (SIP), annually assigned to each school.³ The SIP should thus ensure that the needs of all students, especially Black and Native American students, are met.⁴ According to Dr. Renard Adams, the Director of the Office for Research, Assessment, and Accountability at PPS:

School based leaders are required to align their use of Equity FTE with school improvement plans or district goals... the use of funds is examined in accordance with the school-based theory of action outlined in the school improvement plan.⁵

In the 2013-2014 school year, with these action plans in use, Portland Public Schools introduced General Fund Equity allocation into the annual budgeting process. The primary purpose was to provide extra funding in order to increase the number of full-time teachers. These were the Equity FTE positions.



At the recommendation of Superintendent Carole Smith and the Board of Directors, certain K-8 schools would qualify for a maximum of 8% FTE in Equity financing—4% if at least 45% of their students were Historically Underserved, and another 4% if at least 30% qualified for free or reduced-price lunches.

To count as “historically underserved,” a student must be registered in the District as Black, Latino, Native American, or Pacific Islander; qualify for Special Education services; qualify for free or reduced-price meals through the Direct Certification platform, which means a low socio-economic status; or qualify for English as a Second Language (ESL) services.⁶ These were merely labels for the purpose of allocating money; there was no attempt to find out if any students had been historically underserved, or to even define what “underserved” meant in terms of instruction.

Schools surpassing the minimum requirements receive a specific amount of these funds as seen fit by PPS. However, high schools do not need to meet a specific floor to receive funding—all qualify for Equity FTE in some form.⁷ According to original budget documents, the money is generally intended for staffing. Importantly, after schools surpass a floor for Equity FTE, the PPS Board of Education determines how much individual schools get each year, not according to a fixed rate.⁸

The equity funding policy was problematic from the start. In February of 2013, Richard Tracy, then District Performance Auditor for the Portland School Board, determined “the district lacks a defined process for reviewing, approving, monitoring, and assessing school improvement.” Tracy gave several reasons for this vagueness.

First, school administrators often saw SIPs as “compliance exercise[s]” that do not require data analyses for specific areas of weakness.

Second, the deadline for SIP submissions was inconvenient, and the District oversight process before submission was difficult or even nonexistent.

Third, changes to federal requirements kept PPS in limbo over whether a new form of SIP documentation should be used and whether Title I and non-Title I schools should have the same criteria for completion. Title I schools receive money based on the number of students who qualify for free or reduced-price lunches.

Before the audit, most school improvement plans prioritized goals for family involvement, class accomplishments, and staff training, but statistical benchmarks were seldom mentioned and the district’s Chief Academic Officer gave little feedback. Tracy recommended that all this be changed so “PPS managers... see a more coherent connection between district milestones and school-based activities and a clearer process for assessing and documenting school and district accountability.”

While the district had an efficient process for getting financing to needy schools, Board members could never make a clear case that the funding was resulting in “educational equity.”

In 2016-17, with new reports that “fewer students...meet the economic disadvantage criterion,” the floor to qualify for Historically Underserved FTE (half of Equity FTE) was reduced to 15% of students and the floor for Socio-Economic Status to 40%. Totals in General Fund Equity were kept at 8% of the district’s General Fund, which remains so today. The goal was to expand resources to more needy schools and non-white students.⁹

The Community Budget Review Committee (CBRC), whose members are elected to three-year terms on a rolling basis, welcomed this action as “an important down payment on the promise of the new Racial Educational Equity Policy.”¹⁰

The district’s 2016-17 budget document emphasized in all caps that Equity FTE was “IN ADDITION” to core programming. For this reason, general fund allocations are separated into centrally allocated school resources and school-allocated FTE funding, which includes Equity FTE.¹¹

Concerns about what exactly Equity FTE funded, however, contradicted the district’s previous claims. As the CBRC reported in their 2016-17 review, “It was disappointing to learn...that some equity allocations were being used to provide the core program rather than supports for underserved populations.”

Following the revelations, the Committee recommended increased transparency in reporting data. For example, racial disparities in student discipline had actually increased, without any way of explaining the change. PPS management was not willing to entertain the possibility that disciplinary action is a function of student behavior. They assumed that racial disparity in discipline, as with academic achievement, was the result of systemic racism by their own employees.

The financial tools for tracking equity allocations, they also wrote, had failed and must be replaced. “Without this detail about how the equity allocation is being used,” they concluded, “its impact on equity remains unknown.”

Anjala Ehelebe, the Committee’s co-chair, also said PPS had not fulfilled any requests for reporting on the “linkage” between the budget and its goals.¹² According to another review by the CBRC in 2018, again contrary to earlier claims that PPS was distributing General Fund Equity to schools with intentions other than core programming, the Board stated that “Principals will use their staffing allocation to meet core program requirements... [which] will not be one size fits all.”¹³

“Ten Toes In” on Data-Backed Practices

During the 2018-19 school year, with new Superintendent Guadeloupe Guerrero in charge, PPS proceeded to introduce the Racial Equity and Social Justice (RESJ) Lens. While not directly linked to the Lens, all staff supported by equity funding (now called 8% of “integrated grants,” federal and state) are informed by it. These include vice principals, instructional specialists, school climate specialists, counselors, and social workers.¹⁴

The Lens is intended to give Equity FTE more substance. While primarily a goals-based system for ensuring students' needs are met equitably, the Lens has been described as a "compendium" of prompts, beliefs, and exercises designed to "interrupt ladders of inference," which are thinking processes that everything we see is molded primarily through lived experiences.¹⁵

The goal of the Lens is to disrupt racial biases in school administrations through "targeted universalism," a political theory that specific racial groups can receive preferential treatment without the stigma of "unfairly helping one group over another, seeding hostility and resentment." Further, the Lens functions as a way of educating staff and students about systemic racism and as a model for countering racist practices in teaching.¹⁶

Following the new RESJ Lens and strategic plans, an internal audit in January 2019 by ODE revealed several glaring district failures. According to the report, part of these were organizational in nature: administrators were given more money—approximately 22% more than the previous year—but not enough incentive to work for high-poverty schools.

Despite the implementation of the Lens, staff were 50% more likely to leave Title I schools than non-Title I schools or take paid time off, hurting racial minorities. New "reactionary" initiatives for reducing pressure on teachers with math curriculum changes and limiting bad student behavior were deemed overwhelming. "Unsatisfactory" teacher evaluations were also seldom recorded, and a suspect 0.2% of teachers left their job because of an evaluation, leading auditor Kip Memmott to recommend stricter reporting systems.

However, the biggest revelation came through a definition of ODE's own financing strategy: "Disparate sources of funding... splinter school improvement efforts, particularly for struggling students," Memmott wrote. "The agency... has a lack of coordination between teams... has limited agency on how legislative initiatives can fit into its existing structure... [and] has also struggled internally to mesh different personnel with the same school districts." Grants and other sources of federal funding do not carry obligations about where they are intended. The same is true for General Fund Equity.¹⁷

In 2020-21, during the COVID-19 shutdown, the Superintendent's Office claimed it would be making \$57.75 million in budget cuts. As the 2019 audit also foresaw, however, PPS planned to hire more high school social workers, hire more middle school counselors, and create social emotional learning curriculum with equity funding to correct for employee turnover. Equity FTE remained stable within the district's budget.¹⁸

The Superintendent's Strategic Plan and Budget Message also detailed new "shifts" in their administration. Among these, PPS would create a RESJ Community Accountability Committee and Advisory Team and attain an end-of-year goal of 20% of employees ("influencers") educated in RESJ professional development.

Four equity-related goals were also mentioned: third grade "students of color" must reach 60% proficiency in reading, fifth grade students of color must reach 60% proficiency in math, all

students must reach 51% proficiency in reading and math, and 56% of students of color must demonstrate some degree of college readiness.¹⁹

As of 2024, none of these goals have been fully met.

Meanwhile, CBRC members continued to question the imprecise “linkage” between PPS’s strategies and goals related to equity funding. Some members worried about a culture in PPS that has big and broad goals yet fails to guarantee adequate resources in a resource-constrained environment. Where money is allocated with respect to goals is unclear.²⁰ As one member noted in a 2020 meeting,

There has never really been a way for the district to quantify those [four] goals.... It is really hard without being directed to the numbers to be able to see how the district is crafting a budget that is going to achieve these goals.... At the same time, this is a budget for a district that doesn’t exist [because of the shutdown].²¹

The PPS Board of Directors also submitted queries to PPS staff in a series of email threads which were aggregated on the PPS website. Some queries in these threads are notable because they were never answered. For example, a Board member requested retention data for black employees; the number of black employees had stayed largely the same and corresponded with the share of black students in the district, but there was no way of assessing employee turnover from data on hand. PPS staff asked for clarification but never directly answered the request before adoption of the budget.²²

In response to inquiries from the CBRC, Superintendent Guerrero reiterated that money would, in one case, go to more counselors and “rank-and-file teachers” to ensure they are culturally responsive; in another case, money would go to “transformative curriculum and pedagogy” to replace decades-old textbooks with climate justice curricula, ethnic studies classes, and middle school redesign, besides more funding for lagging performing arts and physical education programs.

“It is hard to give you one action step that’s going to produce those improved outcomes,” Guerrero said, “but the combination of the coherent strategies is what we believe is going to move the needle across those grade levels.”

When asked again about the mechanics that might help PPS move the needle, Guerrero said PPS would hire more instructional specialists for struggling students, train professors in the “science of reading” (phonics), and hire more social workers and “student engagement coaches” for door-to-door support during COVID-19.²³

It appeared that PPS began using Equity FTE for core programming, which was not its original intention.

A new Student Success Act, signed into state law in 2020, guaranteed PPS over \$39 million in extra funding, which they advanced for a new strategic plan (2021-25) to buoy RESJ “partnerships.” The plan was called a Student Investment Accounts (SIA) Plan, or crosswalk

plan, to target 23 Focus schools.²⁴ Approximately \$7,192,000 of this money went toward projects that explicitly referenced equity, like ethnic studies curriculum, “hate-related crisis response” systems for teachers and counselors, and “culturally-responsive Physical Education curriculum.”

This did not include more than \$2 million for 27 new instructional specialists for needy schools and over \$3 million for 43 new social workers. The bulk of funds, however, were directed toward “RESJ contracts with culturally-specific organizations.” The specific identities of these organizations are unknown, though PPS currently contracts with the Black Parent Initiative (BPI), Horizons Counseling, a “wraparound service” provider for African Americans in Self Enhancement, Inc. (SEI), and the Urban League of Portland, among other nonprofits.

Of these, SEI is the most popular company contracted for individual schools. Except for PE program changes, the ends of equity funding reinforce promises by previous administrations to look beyond core programming.²⁵ According to the CBRC, however, it is difficult to tell what qualifies as core programming, particularly if any other strategies employed to eliminate the achievement gap yield few results.

PPS’s crosswalk plan is important to note because it is used for the same purposes as equity funding. Although funds emerge in the form of federal ESSER monies, PPS directs them largely to the same sources as Equity FTE. For example, in 2021, it was confirmed that \$10 million would go to equitable projects and more community-based partnerships supporting “mental and behavioral health” for needy communities.²⁶ The end goal of these projects is unclear from the district website.²⁷

The district spent a peak 189.03 FTE in General Fund Equity in 2018-19, but these investments have declined by 10% in subsequent years.²⁸ The decline coincides with a gradual increase in SIA funds for schools, so in terms of equity funding, equity-related allocations have only increased each year.²⁹

A follow-up audit by Memmott and ODE in March 2022 found recurring problems with budget oversight. The RESJ plan for the school year, which supported \$35 million in total investments for instructional specialists and \$53.4 million investments in textbooks (much of which was funded by Equity FTE) provided no “coordinated evaluation framework” to monitor its success.

Instead, “documentation consisted of a link to a website showing only the number of hours of service provided by individual contractors and the number of students served.” PPS conducted several hearings with various staff from high schools to assess discipline reporting, but none of these staff were from problematic or high-poverty schools like Jefferson, so oversight became impossible.

Scope of work plans recommended in 2020 to specify all contractual obligations and outcomes related to RESJ were adopted, but district officials only provided the number of hours worked rather than statistical outcomes. PPS either ignored employee turnover or failed to provide accountability data, corroborating earlier suspicions by the CBRC in 2019.

Besides this, the Board reduced the number of assessment performance indicators, most notably Growth Indicators, in 2020, but never replaced them. Relevant measures of student outcomes “do not appear to be required by a district policy or administrative directive,” Memmott wrote.³⁰

Chief Academic Officer Kimberlee Armstrong, when asked about research-driven methods to raise student test scores in an October 2022 work session, emphasized that professional development for teachers is the most effective way. When asked about any newer “inputs” PPS could invest in, Armstrong asserted that PPS had not yet implemented professional development training. She later stated,

When we adopt research-based standards of high quality and structures, we remove the guesswork on what teachers need to teach.... When teachers are in a position where they don’t know what to teach, this is where you see their implicit biases come forward more, even in the absence of more professional learning. We are just a year in at getting our foot in on these research-based best practices, and we have to hold the line and implement for fidelity.

Hermann Edwards, a Co-chair for the Board, also remarked that any efforts to expand these plans should be neither noncommittal nor used for good publicity, but rather “ten toes in” and ready with as much funding as necessary.³¹

The CBRC report in May 2023 congratulated PPS for keeping Equity FTE stable at 8% of the budget, even with cuts, but voices concern that leftover federal ESSER funds are being used for this task, an unsustainable practice. As of the 2023-24 school year, PPS has \$36.3 million to spend in ESSER funds. These will be directed mostly toward intervention and leadership teams (\$11.3 million), more professional development programs (\$8.8 million), a “Graduate Portrait” (\$7.55 million), “future-ready learning” (\$4.5 million) and extended-day and summer school classes (\$2.6 million) for *Forward Together*, a racial equity-focused pandemic recovery plan.³²

However, the CBRC notes that the majority of this funding is not for specific programs within schools; rather, it is district comprehensive and vaguely worded. The summer enrichment programs, coordinated through Schools Uniting Neighborhoods (SUN), are also only reserved for students who academically rank above the 10th percentile, which contradict promises that summer learning is an alternative approach for all non-white students to catch up.

In addition, PPS is prepared to spend \$3 million in equity funding for fine arts programs and \$4 million for instructional “coaches,” which the CBRC says is not in line with the Racial Educational Equity Policy.³³

Three conclusions must be emphasized in terms of these findings. First, the primary objects of equity payments are comprehensively stronger school administrations and more sensitive curricula, with hopes that each will enhance non-white student performance across the district by limiting bad student behavior and teacher turnover.

Second, these objects are often no different from equity-related reforms to core programming, even when the district claimed funds are not for the core or alloyed with other General Fund provisions. Dr. Adams notes today that Equity FTE has traditionally been used for core

programming, counter to many previous district claims.³⁴ If true, using Equity FTE in this manner suggests that the fund is not even needed as a separate mechanism to apportion materials to specific schools. In other words, there is a prescription for which schools ought to receive funds, but not for where in these schools funds should consistently go.³⁵

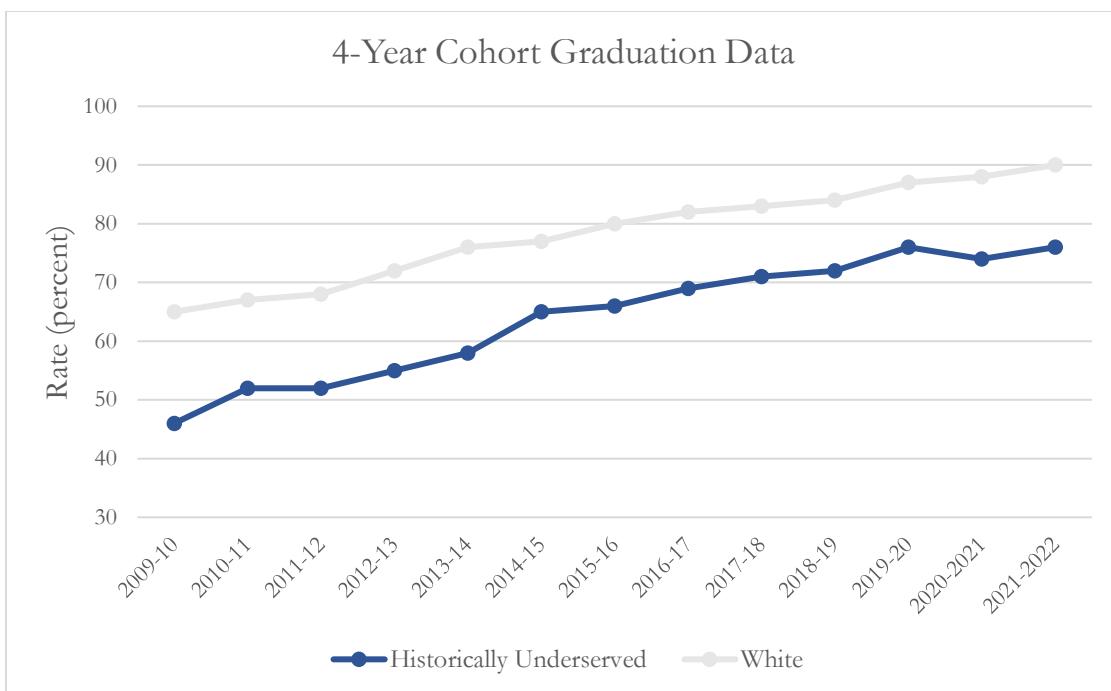
Third, the district does not have enough transparency to demonstrate whether any relevant investments are beneficial. While the RESJ Lens serves as a guide for Equity FTE payments, it does not successfully encourage employee retention, balance discipline rates for white and non-white students, or diminish any other problems historically linked to racial inequities. Today, current systemic biases are given as the main reason why non-white students are not on par, which is precisely what the RESJ Lens aims to eliminate.³⁶

A Problem Refusing to Go Away

PPS has been able to celebrate certain student outcomes including, notably, the percentage of those who graduate on time. Graduation rates for 4-year cohorts comprising all racial subgroups in the district have made strong year-over-year improvements. In 2009-10, for example, the graduation rate for Historically Underserved students was 46% and the completion rate was 58%. By 2014-15, graduation rates had improved to 66% and the completion rate was 68%. By 2021-22, the graduation rate and participation rates each improved to 76%.

Similarly, graduation rates for white students rose from 65% in 2009-10, to 77% in 2014-15, to 90% in 2021-22, with corresponding improvements in completion rates. Importantly, these improvements span three different superintendents and several administrations in Research, Assessment, and Accountability.

However, the gap between graduation rates in both subgroups narrowed just 5 percent from the 2009-10 school year to the 2021-22 school year: white students enjoyed a 25% increase whereas non-white students enjoyed an increase of 30%. As of 2021-22, white students were still 24% more likely to graduate in four years than non-white students.³⁷



Clearly, the gap problem is a tougher challenge than raising graduation rates themselves.

Attempts at improving exclusionary discipline through General Fund Equity have not yielded success, either. As of the 2021-22 school year, non-white students classified as Historically Underserved are about three times more likely to be expelled or suspended out of school than white students; black and Native American students are about five times more likely to be so.³⁸

These disparities are especially pronounced in Jefferson High School, Leodis V. McDaniel High School, Harriet Tubman Middle School, Jackson Middle School, and Sabin Elementary, which all receive General Fund Equity money. This is not an improvement from previous years.

In its most recent contract with the Portland Association of Teachers (PAT), the District appears to have given up completely. According to Article 9,

Student behavior is an expression of unmet needs, and makes sense when put in context. The disciplinary response process should be aimed at meeting these needs and create an environment that helps students find new ways to meet their needs. With this belief PPS will begin to move from exclusionary discipline to Restorative Practices for all Pre-K to 12 grades.

Abolishing exclusionary discipline may eliminate the racial discipline gap, but it will not improve the classroom learning environment. It will also give demoralized teachers a good reason to seek employment elsewhere.

State test results for students in low-income neighborhoods, says PPS, are another major target of General Fund Equity. For example, Jefferson High School has been routinely listed as a “Focus” school; it is the largest beneficiary of General Fund Equity payments.³⁹ Its students fall within

the lowest 10% of performers across the state.⁴⁰ As of the 2022-23 school year, 42% of the student body are black and 83% qualify as Historically Underserved.

For context, just 26.9% of all students in Portland Public Schools are a Historically Underserved race; more than double that number, about 55%, are white.⁴¹ Jefferson is located in the Albina neighborhood of Portland, an area hurt by the construction of Interstate 5 and a possible future site of the Center for Black Student Excellence. Because many Historically Underserved youth in the area attend the school, Jefferson has received serious attention beyond the achievement gap issue.

As Jefferson received General Fund Equity payments in larger shares since 2013, the gap in proficiency between Historically Underserved and white students narrowed. For the 2016-17 school year, Historically Underserved students performed better on the assessment than their white counterparts by nearly six percent. Nonetheless, the percentage of students meeting or exceeding assessment standards declined precipitously, even for High School ELA.⁴² This may have been due to lower participation rates on account of the COVID-19 pandemic, but the Oregon Department of Education already expected student performance to decline.⁴³

In 2018-19, when General Fund Equity was increased, student scores for Jefferson improved. However, the gap in proficiency again widened: where before whites performed about 18% better than non-whites in ELA, the gap widened to 32%. Where before whites performed about 16% better than non-whites in math, the gap widened to 34%. Relative outcomes were almost identical relative to the 2011-12 school year.⁴⁴ Increased equity funding has not made a lasting impact on general trends.

Despite an increase in Equity FTE, scores for white and Historically Underserved races in middle schools are also in gradual decline: Historically Underserved student scores are falling at about the same rate as white students. Meanwhile, the achievement gap remains about the same: non-white students perform 32% to 40% worse in math and 34% to 44% worse in ELA than white students.⁴⁵ None of the four academic goals set forth in 2020-21 were met, reportedly. As of 2023, more “realistic” goals set for these categories have also not been met.⁴⁶ As of 2021-22 statistics, 89% of non-white middle school students in the district do not meet math standards.

The most recent development in the series of PPS equity initiatives is the planned-for Center for Black Student Excellence (CBSE). According to its advocates, the CBSE will primarily function as “a monument to augment in-school learning and a resource hub of programs, aid, and multi-use spaces.” In turn, the community will “feel a sense of shared responsibility for Black student outcomes.”

The promotional materials make no mention of improving student effort, such as raising the school attendance levels by Black students. As of the 2022-23 school year, only 28% of Black students at Jefferson High School attended more than 90% of their enrolled school days, compared with 62% of all Oregon students.

According to the CBSE webpage, roughly \$17 million of the \$60 million reserved for the CBSE through the 2020 construction bond has been used for “community engagement” meetings,

which are “focus[ed] on… student-facing PPS capital projects such as the Jefferson High School modernization.”⁴⁷ None of the money has been spent on construction.

Until PPS releases data that is substantive and reflects individual student improvements attributable to equity funding, the likelihood of fewer disparate outcomes because of the Racial Educational Equity Policy, the RESJ Lens, or similar programs is murky. The primary source of funding in this regard, Equity FTE, is not even exclusively directed toward racial minorities. It rather appears to be an umbrella term for anything PPS deems helpful for the equity cause.

PPS does not appear to have any answer for the ambiguity of their equity programming, which could be due to the nature of student outcomes themselves. A gradual increase in graduation rates, but with stagnating performance, could mean academic performance has a ceiling only affected by a change in curricula or teaching, which evidence largely supports. If it is easier to graduate, those who may have traditionally dropped out might struggle to finish, but finish nonetheless.

The prevailing narrative at PPS is that certain groups of students have been “historically underserved,” but if that definition includes money, the narrative is wrong. PPS has invested disproportionately more state funds in low-income schools over time, such as Jefferson High School, Sabin Elementary, and Boise-Eliot-Humboldt—with consistently disappointing results.⁴⁸

Year-over-year investments over the past decade show PPS continues to impose the same general practices with Equity FTE; updates to the RESJ Lens this year are philosophically the same as Courageous Conversations material from 15 years ago.⁴⁹ Meanwhile, enrollment in the district has consistently declined, and most disenrolled students have not returned.⁵⁰

Although declining enrollment has resulted in a loss of some state funding, other sources such as local operating levies and bond measures are not determined by student enrollment, and local voters have continued to approve them. Thus, more money is being spent in needier schools on fewer students.

Portland Public Schools has a decades-long problem: They keep doing the same thing, and there is little evidence that it’s working. The starting premise for District administrators is that the racial achievement gap is caused by system racism, but when asked in a public records request to document the problem, the District was unable to provide any evidence specific to Portland schools.

Given that PPS faces growing budget cuts over at least the next three years, it might be a good time to stop spending scarce dollars on equity funding and shift the focus to factors that students themselves can control, such as attendance, homework and effort. Among other benefits, holding students accountable for their own behavior would raise morale among PPS staff, who are currently held 100% responsible for academic achievement.

About the Author

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About Cascade Policy Institute

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