

Questions Submitted by Bolton/Cedaroak Parent(s) on 10/22/2024 at the Community Engagement Forum

District Responses are in **YELLOW**.

Budget Concerns

1. **Budget:** We were informed that a budget shortfall of \$4 million unexpectedly ballooned to \$10 million, attributed to several factors:
 - a) **Reduced State Funding:** The reduction in state funding was expected with the end of COVID-related funds. However, we noted that this year's total revenue has actually increased in the 2024/25 budget compared to last year. **So, where is the shortfall coming from?**

Response: The State School Fund (SSF) revenue increases each second year of the biennium (2023-2025) because school districts use a 49/51 split for each year of the biennium. Each year's revenue makes general increases due to interest earning increases, property tax increases, etc. Budget numbers change throughout the year from the date of adoption as funding sources arrive at various times in the year. It is typical for the *actual* budget to look different from the *adopted* budget (which is based on an estimate in May/June prior to the upcoming fiscal school year). To see the answer for the budget shortfall (which affects not just WLWV, but all Oregon school districts), please refer to the FAQ section or read the explanation in the Superintendent's Message in the 2024-2025 Budget found on the [district website](#). In short, shortfalls are due to increases in labor, purchased services, inflation, etc.

- b) **Higher Costs of Insurance, Supplies, and Materials:** While these cost increases were foreseeable, the budget does not reflect a significant rise. A 15% increase in materials and supplies would amount to around \$860k, which is not enough to explain the drastic budget shortfall. **Did the district calculate more than \$860 thousand?**

Response: The budget shortfall for school districts is not simply due to rising costs in purchased services. There is **declining enrollment** which impacts revenue.

- c) **Errors in the Substitute Teacher Contract:** Last year, the district budgeted \$790k less for substitutes compared to the previous year. However, this year's budget allocates \$1.3 million more than what was actually spent in the 2022/23 school year.

This inconsistency raises serious questions about the accuracy of the budget planning.
How do you explain this discrepancy?

Response: Prior to 2022-2023, the district hired substitute teachers through its HR Office. This required staff's time to recruit, interview, hire and deploy substitute teachers. Starting in 2023, the district chose to contract this service to EduStaff. They recruit, hire and train all the substitutes (for multiple school districts in Oregon) and then deploy them to openings in our district as well as other districts using their services. This is now a vendor contract budgeted under "Purchased Services". The cost of using EduStaff is approximately the same as when the school district ran the process and paid the substitutes ourselves.

That said, school districts in Oregon are seeing substitute USAGE increase, however, as new legislation (e.g. Paid Leave Oregon) allows for Oregon employees to take more time off from work. Increased usage results in increased cost. The more substitutes we need, the more we need to allocate cost to cover payment for them.

d) **Increased Revenue:** The total revenue in the 2024/25 budget is \$159,040,621—an increase of \$2,755,849 from last year's adopted budget. Is this correct?

Response: That was correct when the budget was *adopted*. Please see answer 1a for why revenue is different in the second year of a biennium and why budgets change when the school year begins and "actuals" become recorded.

e) **Unaccounted Expenses:** Between the increased costs for insurance, materials/supplies, and substitutes, the total increase from last year's expenses only amounts to \$1,611,150. **This leaves \$8,388,850 unaccounted for. Please explain—where is this money going? Is it related to new school expenditures?**

Response: The district does not understand the reference to \$8,388,850. Purchased services are a component of every fund in the General Fund, as seen when looking through the budget document, eg. utilities, travel, transportation, vendor contracts.

2. **Long-Term Debt Concerns:** Utilization of Surplus Revenue: According to budget reports, the school district had a significant positive revenue in the previous two years. **How was this extra money utilized in the following years, and why is there now a shortage in school funds?**

Response: Federal Relief Funds during COVID contributed to school districts across Oregon and the country having a "bubble" of increased revenue to spend during COVID and through 2024 for staffing needs in response to the pandemic (e.g. hybrid schooling, PPE, additional health assistants). COVID federal funds were used to hire more staff during COVID and in the two years afterwards. These funds are now expended, and staffing that was hired with these funds are no longer sustainable with the general fund provided by the state. There are

[several articles](#) available on the internet that speak to this issue across Oregon schools and nationally.

3. Accountability for Tax Levy Funds: The tax levy passed on November 7, 2023, promised to maintain small class sizes and uphold similar school standards, including the use of aides, through 2029. **Where has this money gone, and how has it been utilized to result in the current claim that the district is facing a large budget deficit, both now and projected for 2025-26? How is splitting up school communities and increasing schools to near capacity “upholding similar school standards”?**

Response: The local option levy was renewed in November 2023 and continues to help fund current classroom teachers, counselors, and support staff across all 16 district schools in 2024-2025 (approximately \$13.5 million or 9% of general fund revenue). These positions were not eliminated during the budget reductions, rather they assisted the district with ensuring that class sizes stayed in the lower range even with budget reductions. Unfortunately, the majority of the funding the district receives is from the combination of property taxes and the State School Fund (approximately \$144 million or 82% of general fund revenue). This is where difficult decisions regarding staffing, programs and resources are made each year in order to balance the budget and maintain fiscal responsibility.

As a relatively higher-income and less-diverse school community, West Linn-Wilsonville School district receives less in federal and state grants to supplement the State School Fund. For example, surrounding school districts with higher enrollment of students who experience poverty receive significant additional grant funding to increase educational opportunities for students and hire additional teachers. In West Linn-Wilsonville, the local option levy fills that gap and allows the district to provide comparable programs, educational offerings, class sizes and student support staff similar to other more diverse districts.

4. Costs of School Consolidation and Student Mobilization: What are the estimated costs associated with consolidating schools and mobilizing students across the district in terms of logistical and operational planning? Additionally, if the district contracts an external consulting company to manage these changes, how much will this cost? **Ultimately, what will be the marginal gain from this entire process? Please actually show us the numbers that are being shown to the board.**

Response: To be clear, no decision has been made at this time about any of the schools. In the event of school consolidation, the first major process that would be required would be to update school boundaries so that families know which primary school their student would attend and school administrators could begin updating staffing models for whenever changes would take effect. Associated costs could include additional bus routes depending on school boundaries, but wouldn't be immediately known. As this process was directed by citizen committees, the district has not researched exact costs or shared figures with the School

Board. The School Board has not entered this process yet. They will get a recommendation of options from the Long Range Planning Committee in January. At that time, they will receive the recommended options from the LRPC and updated budget financials known at that time.

5. Staffing Cuts and Class Size Impact: What staffing positions are planned to be cut, and how much in staffing costs do you expect to save? Additionally, will class sizes be increased at the welcoming schools as a result of these changes? **We believe we are entitled to review the details of your plan before any final decision is announced.**

Response: No plans have been created or discussed with the School Board. The Small Schools Task Force was generated by the Long Range Planning Committee, a School Board-appointed citizen committee. If a decision was made to consolidate schools, cost savings would mitigate any increase to class size. A larger school does not mean larger class sizes. Our schools today that have varying school sizes have the same class size ranges as each other. At this time, each of the other three West Linn primary schools (Willamette, Trillium and Sunset) have capacity to receive more students. The growth in these schools would fill classrooms that now sit empty or are being used to other purposes (e.g. art room, health class, small reading groups).

6. Waterfront Project: Why has the Waterfront Project not been included in the Flo Analytics report for future developments and student enrollment projections? This project is expected to complete its planning phase this year, with construction beginning in 2025. It includes affordable housing options such as townhouses and multi-family residential units, all of which will fall within Bolton's boundaries. **How has the district calculated in the increased Bolton enrollment revenue these developments are likely to create by 2026-2027?**

Response: There are currently no solidified plans for the Waterfront Project. FLO Analytics met with City planners during their demographic report process, and were told there is no data to plan for at this point. While the Waterfront Project is a City process, there is no clear timeline for when any type of housing might be added. As a reminder, this is only a 10-year enrollment projection. If significant new development results in significant population increase in West Linn resulting in more students, there would be an update to the demographic report.

7. Request for Renovation Details: We would like to see the line-item renovations that Arcadis Architect suggested Bolton needs to reach facilities equity.

Response: The Long Range Planning Committee will review potential projects and their associated cost estimates at their December meeting. Information will be shared with the Small Schools Task Force and posted to the district website when it's available.

8. Cost of Contracting J3 Consulting Firm: How much will it cost the district to contract the J3 consulting firm solely for the purpose of “mediating” the task force process of closing schools?

Response: 3J Consulting has been hired using funding from the district’s contingency fund to facilitate the Small Schools Task Force process. The total amount for this SSTF contracted work was set at \$49,930.

9. Exploration of Fiscal Revenue Options: What other fiscal revenue options have been considered by the district? Additionally, **why hasn’t the school community been surveyed to gather their input on how they rank these different options?**

Response: The community is surveyed on budgetary priorities every spring during the budget process. The most recent survey was sent to all community members in April of 2024 ahead of the 2024-25 budget process. 1,299 community members submitted feedback. Those survey results are available on the [district website](#).

School districts in Oregon receive the majority of revenue to their General Fund through local property taxes and the state school fund. These two sources are combined and allocated to school districts in an equalization model legislated through state statute. To supplement this revenue, the district can ask voters for a Local Option Levy that designates additional property tax funds to that district. WLWV already has a Local Option Levy and will not be increasing that amount because the ballot sets a promised rate (ie, not to exceed \$3.00/\$1,000 assessed value).

Other revenue options:

The WLWV community used to have an Education Foundation (non-profit 501c3) which solicited donations for the district. In the past, that only yielded approximately \$100 - \$150,000 annually. Volunteers for the Education Foundation drifted, and the Foundation is currently suspended.

Increasing rental fees - the district recently increased fees for the use of our buildings and fields.

10. Consideration of Budget Cuts: What other budget cuts have been considered by the district? Furthermore, **why hasn’t the school community been surveyed to gather input on how these options should be prioritized?**

Response: Please see the answer to question 9. The district prioritizes positions that directly impact classroom learning when considering reductions. During the 2023-24 school year, the district prioritized reductions in services and supplies as well as positions at the district level. The District made \$10 million in budget cuts to the 2024-2025 school year already.

11. Sustainability of Enrollment and Revenue: The task force did not specify at what point a school's enrollment becomes unsustainable. **How much revenue does Bolton's current enrollment generate?**

Response: School districts are primarily funded on a per pupil basis, or what is called Average Daily Membership Weighted (ADMw). Currently, the district receives approximately \$11,000 per student. Bolton Primary has approximately 220 students enrolled, equating to approximately \$2,420,000 in revenue. To be clear, students would still be enrolled in the district in the event of school consolidation and revenue would still be received by the district. Cost savings would come from core costs such as building utilities, office/nutrition services/custodial staff, principal of that building, etc. (See the FAQ in the Budget Section).

12. Potential Developer Deals: Do you already have a deal with a developer for one of the school properties? It seems like the only way you would make any significant money from closing a school. Wouldn't it be fiscally prudent to not propose closing a school if you cannot prove the savings through a pre-planned agreement? **Who is the developer, and what is planned for that property?**

Response: Any decision about the final determination of any property would likely be made well into the future. To date, the Board has held no discussions about the potential of any school site, as no school has yet been identified as surplus. Should any school be consolidated and the building is not planned for any educational purpose, the School Board of Directors will make the final determination whether to keep the building and property for District use, lease it to another public entity, or determine that it is surplus real property to be sold.

13. Budget Committee Representation Concerns: At least three, and possibly four, of the five members on the budget committee live in Wilsonville. **Is this why the lion's share of our budget has been earmarked for Wilsonville priorities while West Linn is being neglected? Can we see the revenue generated by West Linn and Wilsonville residents and expenditures spent in each school?**

Response: The composition of the Budget Committee varies over the years as members exit and enter these positions. It is unclear how the assumption "the lion's share of the budget is earmarked for Wilsonville priorities" is claimed. School district budgets provide funds for each school's operation as well as funding based on students at each school (for classroom students). The WLWV School District budget is not a site-based budget format (by school); rather the budget is allocated by level (primary, middle, high).

14. Curriculum Approval and Its Consequences: A few years ago, the district approved the Lucy Calkins Units of Study curriculum, even though it did not meet Oregon's standards. When parents began organizing a lawsuit, the district chose to adopt a new curriculum. **If the district had initially selected a curriculum that met state standards, would we be in this financial position today? How much did that mistake cost us?**

Response: The Lucy Calkins Units of Study was an independent curriculum adoption and the district's process was approved by the Oregon Department of Education at that time. The district did not begin a renewal process because a few parents were upset, instead it was because of the 7-year recurring renewal requirement by the Oregon Department of Education. The ODE renewal cycle requirement meant that we began the process last year. The renewal process has resulted in new materials which have been purchased. There was no mistake, therefore no costly error.

15. Curriculum Adoption and Costs: Our current math curriculum, *Investigations*, also does not meet Oregon's standards, and we are beginning the process of adopting a new math curriculum this year. What will be the cost of this new adoption, and how can we avoid the expense of replacing curriculums every few years? **For literacy, we followed Lake Oswego's lead in selecting a curriculum. Is there a way we can leverage the research they've already done to make more cost-effective decisions for our district?**

Response: All Oregon school districts must adopt instructional materials according to a timeline developed by the Oregon Department of Education. The school district will comply with Oregon law for the process of adopting instructional materials for mathematics ([Chapter 337](#)). Districts are required to conduct a process that includes public comment and assistance from staff and administrators.

The district consulted with Lake Oswego School District and a number of other school districts in the Portland Metro Area to see where they were in the process and what they selected during the language arts adoption process, but each district is required to conduct their own process.

Costs incurred in state-required renewal processes include staff's time (substitute teachers) and the materials. Literacy adoptions are generally the most costly of the content areas as they include many student textbooks, novel sets choices, writing materials, etc. The mathematics adoption will likely be much less.

16. New Health Curriculum and PE Requirements: The district recently adopted a new health curriculum for primary grades, which now results in students receiving only two 30-minute blocks of PE per week. However, the state of Oregon requires students to receive 150 minutes of PE per week. **How do you plan to address this discrepancy? Additionally, how much did this new curriculum, which does not align with our weekly schedule requirements, cost the district?**

Response: The primary schedule of two 30-minute PE classes per week has been in place for over two decades and is not different from the schedule for the 2023-2024 school year. The district, along with other school districts in Oregon, is making strides to meet the challenge of 150 minutes of PE per week.

Meeting this requirement is proving to be a challenge for many districts in Oregon. It is already difficult to provide meaningful learning time for all the subjects and learning standards which

must be taught in primary schools: language arts, mathematics, social studies, science, social-emotional learning, health, etc. Adding more time for PE minutes means less time for academic learning in these content areas. Additionally, most primary schools do not have the gym space to provide more than two PE classes per week to all classes. In times of budget difficulties, adding additional PE teachers to teach more PE classes will result in decreased classroom teachers and higher class sizes. Instead of adding additional PE classes in the gym, the school district is examining ways to embed physical movement (which qualifies as PE) in the classroom environment, which is a strategy approved by the Oregon Department of Education.

17. Budget Management Comparison: Lake Oswego is able to balance their budget, so why can't our district do the same, especially when we generate more income from property taxes than they do? **How has the district evaluated our budget to theirs and what have you learned from the comparison?**

Response: Every school district's budget and budget priorities are unique. All Oregon school districts follow GFOA accounting standards. The WWLW School District balances its budget every year. Balancing a budget requires making sure revenue and expenditures result in an ending fund balance that is not negative. The district chooses to be transparent with its community and share when there are large reductions that need to be made in order to balance the budget. It's also worth noting that the Lake Oswego School District has [closed elementary schools](#) in the past 10 years to address enrollment and revenue declines, including Bryant Elementary and Uplands Elementary.

18. Concerns Regarding Budget Estimates and Decision-Making Timeline: We've noticed that the budget committee has been estimating both the beginning and ending balances for the district's budget, presumably due to a lack of actual figures at their disposal. Since at least 2021, these estimates have often been wildly underestimated—in some cases, by as much as \$25.9 million. For instance, in the 2023-2024 budget, the ending balance was over \$9 million less than the beginning balance projected for 2024-2025.

Currently, the 2024-2025 budget projects an ending balance of \$6.8 million. However, given the historical trends, this estimate could be much lower than the actual amount. Is the district operating under the assumption that there will only be \$6.8 million left in the general fund when making its decisions? If so, you might be basing your actions on potentially faulty information.

The actual financial figures for the 2024-2025 school year will be released in December, but by that time, it will be too late for the Small Schools Task Force to review this data before the board makes its final decision. In light of this, will the district agree to extend the exploratory period to ensure that closures are truly necessary based on the most accurate and up-to-date financial information?

Response: If one looks at the Revenue and Expenditures of the 2023-2024 Budget Document, they will see that the projected expenditures far exceed the revenue (in

2023-2024 by approximately \$17 million and in 2024-2025, even with the \$10 million reduction, by approximately \$14 million). Only because of the hefty reserves the district was carrying over (from COVID federal relief grants and state grants), was the district able to offset these over-expenditures. These reserves are now depleted (See Superintendent Messages in both the 2023-2024 Budget Document and the 2024-2025 Budget Document). The district must now work to stabilize the projected Expenditures to more closely align to the projected Revenue.

Looking towards 2025-2026, one can see that the District will only have a carry over of approximately \$6.8 million going into that year. If the gap between the district's projected revenue and projected expenditures for 2025-2026 are greater than what the reserve can cover, there will be a deficit. Therefore, it is very likely that the district will need to begin planning for another sizable expenditure reduction going into 2025-2026. The exact number is a moving target. Revenue changes come in throughout the year and expenditure changes occur throughout the year. What is clear, however, is that the District needs to get expenditures to a more sustainable level in line with annual revenue. As District enrollment declines, the revenue also declines.

Budget Solution Suggestions:

1. Substitute Teacher Payments: Is it true that substitute teachers were paid for six hours when they clocked in for four or more hours due to stipulations in the contract? If so, I understand that this is a fairly common practice with these contractors. Why wasn't this issue caught earlier? Why are we being penalized for these mistakes? Moreover, **why are we still using this contractor in next year's budget with an additional \$1.3 million allocated, especially when there's a supposed budget shortfall? Why not revert to managing this in-house?**

Response: The district has not experienced a significant increase in substitute teacher costs. Prior to 2022-2023, the district hired substitute teachers through its HR Office. This required staff's time to recruit, interview, hire and deploy substitute teachers. Starting in 2023, the district chose to contract this service to EduStaff. They recruit, hire and train all the substitutes (for multiple school districts in Oregon) and then deploy them to openings in our district as well as other districts using their services. This is now a vendor contract budgeted under "Purchased Services". The cost of using EduStaff is approximately the same as when the school district ran the process and paid the substitutes ourselves.

That said, school districts in Oregon are experiencing an increase in substitute USAGE, however, as new legislation (e.g. Paid Leave Oregon) allows for Oregon employees to take more time off from work. Increased usage results in increased cost. The more substitutes we need, the more we need to allocate cost to cover payment for them.

2. Transfer Rates and Potential Solutions: Fig. 11 shows that intra-district transfer rates for K-5 students are already relatively high, around 15%. Given this, relocating students

from overcrowded schools to the “small” schools could be a more viable, less complicated, and less expensive solution. **Has the district considered slight boundary changes?**

Response: The Small Schools Task Force is exploring all possibilities. It may be that they decide to discuss boundary changes. Slight boundary adjustments may increase enrollment at small schools, but would not directly mitigate the budget challenge.

3. Audit Firm Concerns: Why has the district recently started using the firm Pauly, Rogers & Co., given their history of failing to detect an embezzlement scheme with the city of West Linn, which led to a settlement, and their current involvement in another issue with the Columbia River Fire Department? **Will you continue to rely on them for your audits, despite these concerns?**

Response: The school district auditor is selected by the School Board. In addition to the selected auditor, several other entities review school district budgets including the Oregon Department of Education, the WLWV Budget Committee, the School Board, the County Tax Assessor, Oregon Secretary of State - Audits Division, Government Finance Officers Association, and the Oregon Department of Revenue.

Data concerns:

1. Demographic Report Concerns: The demographic report, specifically Fig. 3, relies heavily on census data up to 2020, which doesn't account for the significant changes during and after the COVID-19 period. Fig. 3 only includes population estimates between 2020 (based on real census data) and 2023 (projections/estimations), and even lists “N/A” for the estimated population of the WLWV school district. **The report lacks sufficient detail about the model used for these projections and doesn't clearly explain where the 2023 estimates were sourced from.** While some data was taken from a recent Portland State University report, the limitations outlined in the report's disclaimer do not inspire confidence. **How can this questionable data be used to make such critical decisions, like closing some of your best schools?**

Response: The enrollment forecasts were developed by Flo Analytics, a firm that regularly works with public K-12 school districts to prepare enrollment forecasts. Interested community members can learn more about the firm, staff involved, and a partial list of school district clients by visiting their [website](#).

The forecasts utilized data from the following sources:

- Decennial Census and American Community Survey, U.S. Census Bureau
- Birth data, Oregon Health Authority
- Population estimates and forecasts, Portland State University Population Research Center
- Enrollment data, WLWV School District

- Land use data, Clackamas County and the Cities of West Linn and Wilsonville
- Housing characteristics and spatial data, Metro
- Additional data was collected from Washington County and the City of Tualatin, as a small portion of this area is within the WLWV School District boundary

It is typical for consultant reports pertaining to the future to include qualifications of this kind. The report is an important factor, but is presented in a broader context that provides confidence in the conclusions drawn.

2. Historical Enrollment Data Concerns: The presentation of historical enrollment data by school (Fig. 10) obscures the impact of COVID-19 by calculating numbers between 2017-18 and 2023-24 without properly highlighting the significant drop in enrollment that occurred between 2019-2020 and 2020-21. **This data should have been presented as a line or bar plot over time to clearly show these trends.** In reality, the biggest drop in enrollment happened between 2019-2020 and 2020-21, and since then, from 2021-22 to 2023-24, there has been only a small change in enrollment across all primary schools, with West Linn schools showing a more positive trend (except for Willamette). **Why did you report data in a way that indicated historical low enrollment without attributing it clearly to the COVID years?**

Response: Figure 10 in the FLO Analytics report presents actual historical enrollment data. COVID-19 played a significant role in the decline of enrollment in West Linn-Wilsonville and across the entire nation. Public Education in the State of Oregon declined by approximately 40,000 students during COVID-19. Flo Analytics factored the impact of COVID-19 into its enrollment report and there was no intention to minimize its role.

3. Future Enrollment Growth and Overcrowding: Given the inevitable enrollment growth due to new developments like the **Waterfront Project, which was not accounted for in the current report**, we actually have concerns about future overcrowding. The data in **Figures 15-16** on birth rates and kindergarten enrollment ratios across all scenarios (low, middle, high) projects a slight increase in these variables. Similarly, **Figures 18-19**, which cover district-wide projections, show stabilization around 2028-29, with a slight increase in enrollment in the middle and high scenarios. Specifically, **Figure 19** highlights that the decline is most pronounced at the middle and high school levels, not at the primary school level. This aligns with the text on page 3 for the middle scenario, **which predicts a 10% increase in primary school enrollment and a decrease for middle and high schools.** Given these projections, what is the district's projections for overcrowding? Overcrowding negatively impacts our students' learning environments. It is concerning that the district appears to be neglecting the overcrowding issues at West Linn High School and Rosemont Middle School.

1. **What is the district's plan to deal with future overcrowding in West Linn schools?**

Response: The Flo Analytics Enrollment Report does not predict overcrowding of West Linn schools in the next 10 years.

2. Is West Linn being singled out for future, inadequate, overcrowded learning environments because of short term district budgeting problems?

Response: No. The Long Range Planning Committee created the Small Schools Task Force to explore the feasibility of small schools in West Linn.

3. Will more of our future tax dollars then be spent on building new schools after closing existing ones now?

Response: Based on enrollment projections, the district has no plans to build additional schools in the foreseeable future. There will be opportunities for community input before the School Board considers what projects may be included in a potential capital bond measure.

4. Lack of Confidence Intervals: The report does not mention any confidence intervals that would allow us to assess the significance of the positive or negative numbers, making it difficult to understand the uncertainty in these projections. **While the low-medium-high scenarios attempt to address this, they actually result in a wide range of estimates, which suggests the numbers should be taken with a grain of salt. What is your response to this lack of clarity and precision?**

Response: The enrollment forecasts were developed by Flo Analytics, a firm that regularly works with public K-12 school districts to prepare enrollment forecasts. Flo Analytics' methodology can be accessed in the 10-year enrollment report. Interested community members can learn more about the firm, staff involved, and a partial list of school district clients by visiting their [website](#).

The forecasts utilized data from the following sources:

- Decennial Census and American Community Survey, U.S. Census Bureau
- Birth data, Oregon Health Authority
- Population estimates and forecasts, Portland State University Population Research Center
- Enrollment data, WLWV School District
- Land use data, Clackamas County and the Cities of West Linn and Wilsonville
- Housing characteristics and spatial data, Metro
- Additional data was collected from Washington County and the City of Tualatin, as a small portion of this area is within the WLWV School District boundary

It is typical for consultant reports pertaining to the future to include qualifications. The report is an important factor, but is presented in a broader context that provides confidence in the conclusions drawn.

5. Outdated Data Concerns: Flo Analytics based most of their data and projections on the 2010-2020 census data, which is now outdated. This is particularly concerning given more recent population data from Portland State University's Population Research Center, which

contradicts these older numbers. **How could this discrepancy have been overlooked?**
How did the board review Portland State University's data?

Response: Flo Analytics' methodology can be accessed in the 10-year enrollment report. FLO Analytics used multiple data sources to inform the enrollment forecasts:

- Decennial Census and American Community Survey, U.S. Census Bureau
- Birth data, Oregon Health Authority
- *Population estimates and forecasts, Portland State University Population Research Center*
- Current enrollment data, WLWV School District
- Land use data, Clackamas County and the Cities of West Linn and Wilsonville
- Housing characteristics and spatial data, Metro
- Additional data was collected from Washington County and the City of Tualatin, as a small portion of this area is within the WLWV School District boundary

The Portland State University's Population Research Center data is a projection based on census data. For instance, PSU's 2019 estimate is based on 2010 census data. See "Developing the Population Estimates" for more information.
<https://www.pdx.edu/population-research/about-population-estimates>

It should be noted that the district has experienced an actual decline in enrollment of approximately 1,000 students since the 2018-19 school year.

6. Questionable Data Collection Methods: Flo Analytics factored in new births to district residents by surveying school cohorts from September to August. **Does this mean they simply asked around?** This approach doesn't seem like a reliable or rigorous method for gathering accurate data. **How can we trust projections based on such informal data collection?**

Response: Flo Analytics' methodology can be accessed in the 10-year enrollment report. Information about births of district residents can be found on Page 6 of the [report](#). Flo Analytics utilizes District-specific birth data from the Oregon Health Authority and actual historical enrollment data from the district.

7. Flo Analytics Report Costs: How much did the district pay for the report from Flo Analytics, and is it possible to get our money back? The report is not reflective of future trends, as verified by Dr. Michal Segal Rozenhaimer, a highly qualified data scientist at Cedaroak, who has already contacted you regarding this issue.

Response: FLO Analytics has responded to the information submitted by a community member. The responses can be viewed on the [District website](#).

The Flo Analytics Demographic Report cost a total of \$48,757.20. Flo Analytics began work in January of 2024 and the report was completed in July of 2024.

SSTF Report Concerns:

1. Request for Educational Adequacy Scoring Rubric and Results: We would like to review the scoring rubric and results for educational adequacy. If Bolton is the highest-performing school in the district but has one of the lowest scores for facilities supporting its educational program, there seems to be a significant discrepancy. This situation suggests that either the Bolton team are miracle workers, or we need to revisit Arcadis's scoring system. According to their assessment, it appears that facilities with higher scores are producing lower academic results. **How do you explain this inconsistency?**

Response: Educational Adequacy describes how conducive a building is for K-12 education. The rubric used for determining educational adequacy is based on the [Oregon Department of Education's recommended rubric](#). The rubric can be found on page 15 and includes categories for acoustics and noise, air quality, lighting, temperature, and school capacity and classroom space.

2. Capacity

Definition Changes: In 2018, the district changed how school capacity is defined. Previously, in 2014, capacity was based on the number of classrooms and desks/seats, with Bolton's capacity set at 363 students (22/class). Now, capacity is determined by square footage per child, which has increased Bolton's capacity to 475. With 16 classrooms at 475 students, class size would be 29.7. Why did the district alter the definition of capacity to inflate the appearance of under-capacity? **Why is the Small Schools Task Force being encouraged to use this inflated capacity model that will result in overcrowded classrooms?**

Response: Changes in capacity occurred due to calculation methodology. In the 2007 and 2013 analysis, learning space capacity was calculated using a class size and room utilization method. In the 2018 analysis, capacity was calculated using a square-foot-per-student ratio. Although class size and room use were factors in developing the correct ratio, the analysis resulted in slightly different capacity numbers for each facility. This square-foot-per-student ratio is derived through an analysis of many factors: national and regional standards, preferred class size, class schedules, academic programs, and District planning priorities. The District will continue to use the square-foot-per-student ratio in the updated Long Range Facilities Plan.

3. Class Size Concerns: The district seems to suggest that a new teacher is warranted when 22-25 more students enroll, implying that classroom sizes should top out at 25 students per class. If Bolton's classrooms top out at 25 students, we estimate that we would have a 400 student population. If capacity is 475, students per class would be 29.7. This is far from ideal and appears to contradict the district's own standards. **Is this really what the district is suggesting?**

Response: The Long Range Facilities Plan outlines the process used for establishing learning capacity.

4. Parent Preferences for Small Class Sizes: The district suggests that parents may transfer out to seek more peer options for their children. However, the reality is that many families have chosen West Linn specifically for the small class sizes, which they believe provide a better educational environment. Has the district provided parents data about class size and then surveyed parents about their opinion of ideal class sizes? The Small Schools Task Force listed two classes at each grade as a minimum for sustainability and equity, which Bolton has. Bolton has 19.25 kids per class if enrollment is spread evenly and two classes per grade, **why then, is it unsustainable and how does the district know if parents think 19.25 students/class is too small for their student?**

Response: With growing budget challenges, more reductions will be needed for the 2025-26 school year. While the exact dollar amount is unknown at this early point in the year, it is possible that the district will need to reduce teaching positions further, which will increase class sizes across the district. Overall class sizes of 19.25 are likely not sustainable given budget constraints.

5. Large Class Sizes and School Performance: The district acknowledges that large classes are not ideal, but are they aware that schools with 400 or more students typically underperform compared to both smaller and larger schools? This raises serious concerns about the impact of increasing class sizes on educational outcomes.

<https://smallschoolscoalition.org/how-big-is-a-small-school-a-comprehensive-analysis/> **So where did they get optimal numbers of 400-550? Are these numbers based on square footage of building capacity or student academic performance?**

Response: School size and class size are two significantly different calculations. Class sizes will likely increase next school year regardless of the outcome of the Small Schools Task Force process. Consolidating one or more schools would likely increase the overall enrollment at the impacted schools, but not class size. Financial savings from consolidating small schools would mitigate increases to class size by limiting the amount of teaching staff that would possibly need to be reduced.

6. Miscalculation of Core Costs: It appears the core costs have been miscalculated for Bolton specifically. For example, Siri, our former instructional coordinator, is no longer with us, and we now share a librarian—something that was already in place before COVID, so it's not a new development but isn't reflected in the letter. We want to see a line item of costs

associated specifically with Bolton's cost of operations as they should be public information. The core costs should be adjusted to reflect the bare minimum required to run a school effectively. **What did the District discover when reviewing how these numbers were calculated?**

Response: The memo provided to the Long Range Planning Committee was a general estimation for a typical smaller school in the district. Because of current funding challenges, and the smaller student and teacher population at Bolton Primary, there is no instructional coordinator this school year. All other core office costs match other schools across the district.

7. Double Standards in Cost of Core Operations: According to the LRPC memo, there's a concern about the cost of maintaining a school with a small enrollment. However, this seems to hold true only for small primary schools (~350 students) and not for the new Riverside High School, which currently has only ~170 students and is projected to reach ~350 by 2033-34 according to the demographic report. This reveals a clear bias and double standards in the assessment. **How is this being addressed by the LRPC and the board?**

Response: Planning for Riverside High School first began in 2017 with a comprehensive study of high school programming in West Linn-Wilsonville and across the state and nation. Through that study (found on the website), the district concluded that an additional high school was needed to relieve overcrowding at West Linn and Wilsonville High Schools while providing additional learning opportunities for WLWV students. It was determined that a smaller high school setting would be beneficial for many high school students in the district. Riverside High School is an option school, meaning there is no boundary and students who attend are choosing to go there. RHS currently has grades 9-11 with 12th grade being added starting in 2025-26. It is expected that enrollment will grow in the coming years. Riverside High School is both a Board and District priority.

8. Cost of Renovations and Consistency: According to the LRPC memo, there is concern about the cost of bringing small schools in alignment with others. Yet, Riverside High School, which enrolls only ~170 students, has undergone extensive renovations. **How does this align with the concern over renovation costs for small schools?** This inconsistency needs to be addressed.

Response: Please see answer to Question 7. As the school population at Riverside grows, additional building updates are planned to maintain Riverside as a comprehensive high school.

9. Equity Concerns: The board has expressed a desire for all students to have the same educational experience, regardless of the school they attend. However, shouldn't the distance from home to school also be considered? Long bus rides and extended waiting times can significantly impact students, especially younger ones. Additionally, parents of children without a nearby neighborhood school may have to rearrange work schedules or

hire childcare, which places an additional burden on families. **How has this been factored into your equity concerns?**

Response: The walking boundary for each school is posted on the [District website](#). The speed and distance traveled varies widely depending on the number of stops and traffic regulation (speed limit, stop signs, signals, etc). The District currently buses to and from primary schools within the required timeframe. Additionally, the District currently buses to and from middle schools and high schools within the required timeframe, which have considerably larger attendance areas than the primary schools.

Currently, our longest route (distance of travel to or from school) is 9 miles and these children get to school within 45 minutes. First Student Bus Company is contractually required to design routes that transport students to and from school in under 45 minutes.

10. Safety Concerns: While safety is mentioned as a component of educational adequacy, it's important to note that statistically, larger schools are less safe and often require more resources to ensure security, such as metal detectors and school police staff. Teachers are forced to shift from teaching to classroom discipline as risk factors increase. In contrast, smaller schools, where everyone knows each other, typically don't require these measures, fostering a safer and more close-knit environment naturally. **How has the district factored this into their safety calculations?**

Response: The District utilizes a three-tiered approach for evaluating and maintaining safety across district schools. The district is committed to providing equitable security measures (both protocols and building hardware) across each of its schools regardless of size. The size of a school does not impact the type of building features or upgrades that would be prioritized at a school building.

11. Long Range planning committee: What are the qualifications of the long range planning committee? **How can you reassure us that they do not have a conflict of interest in this matter?**

Response: Any time there is an opening for the Long Range Planning Committee, the School Board publicly solicits applications, reviews them, and appoints applicants to fill each position. LRPC terms are three years in length. Members must reapply each time their term expires. LRPC members are required to live within the West Linn-Wilsonville School District boundaries.

Student Welfare Concerns

1. Maintaining Bolton's Academic Status: If Bolton closes, studies show high achieving teams must be kept together in order to not lose any academic attainment and progress.

What is the plan to move all of the Bolton team together? If there is none, how can the district make a decision without a future plan in place?

Response: The process of transferring staff to work in new work locations is defined in the contract agreement between the West Linn-Wilsonville Education Association (WWEA) and the West Linn-Wilsonville School District. The district will work closely with WWEA to staff every school location with strong and high functioning teams.

2. Future of Specialized Programs: How will the district ensure the continuity of valuable educational opportunities like the Mandarin Immersion program at Bolton if the school closes? **What is the district's plan to keep the Bolton community together and also provide space for the growth the Mandarin program is expecting as more grades are added to the program? Will this then result in overcrowding at another West Linn school?**

Response: With current and upcoming funding and budgetary challenges, the district is evaluating all programs and systems across the district. In the event that a school were to close, the district would prioritize keeping student cohorts intact as much as possible, while balancing enrollment across West Linn. This work would begin if there was a decision from the School Board.

3. Impact on Student Test Scores Following School Closures: Research shows that test scores of students from both closed and welcoming schools are negatively affected following a school closure, with students from the closing school experiencing the largest negative impact. **What specific proposals does the district have in place to mitigate these negative effects on student performance?**

Response: Every school in the WLWV School District enrolls new students each school year, so schools are experienced at welcoming and integrating new students into their community. If students are enrolled into new schools as a result of a decision to consolidate primary schools, intentional and well-planned efforts will be made to welcome students to their new school. Staff will implement strategies across all schools to build positive classroom and school communities for returning and new students.

4. Balancing Student Achievement with Financial Constraints: Student achievement growth is the best measure of how well schools help students learn. As a general rule, school leaders should avoid closing schools with average or better growth, as doing so can reduce future student learning outcomes for everyone involved. We understand that factors like building age and low enrollment—primarily financial considerations—must be part of the conversation. However, a plan that saves money but fails to serve students effectively falls short of its purpose. **In what specific ways is the district ensuring that student welfare is being balanced with financial constraints in these decisions?**

Response: Students' academic, social and emotional welfare is the district's highest priority. One of the driving forces behind the community engagement forums is to hear directly from the

community about the factors which must be considered in planning for the future while also resolving significant budget challenges. Regardless of the outcome of any school board decisions on consolidating schools, school staff will maintain a focus on nurturing positive student belonging, strong student-staff relationships and research based instructional practices.

5. Equity Concerns and Transportation Impact: Has the district considered the longer bus rides that the majority of Bolton students—a large, walking-distance population—will face if the school is closed? The district’s previous decision to bus students from the lowest-income school populations to their furthest middle school, Athey Creek, while keeping higher-income communities at their closest middle school, Rosemont, raises serious concerns about equity. **How is closing schools in the lowest median income neighborhoods equitable? Has an equity analysis been conducted, and if so, can we see the results? If not, when will the district be running one and will it be done before recommendations are made for closures?**

Response: The Small Schools Task Force is a citizen group that was formed by the Long Range Planning Committee, a School Board-appointed citizen committee. The SSTF process was not initiated by the school district. No equity analysis has been performed. The district does monitor socio-economic impacts at each of its school neighborhoods. The Bolton neighborhood is not significantly different from other school communities in terms of the number of students who experience poverty. In 2023-24, 8% of Bolton students participated in free and reduced lunch. The district average for free and reduced lunch is 16%. Community members can review data on the [At-A-Glance State Report](#) Card for each WLWV school.

Student bus rides cannot exceed 45 minutes. Bus routes would be designed to minimize the amount of time that students spend on the bus. This process would only begin if the School Board made a decision to consolidate one or more small schools.

Community Concerns:

1. Impact on Future Enrollment and Homebuyers: What impact does the district think the public discussions of school closures are having on next year’s enrollment numbers, especially considering that parents, like us, who research school districts before buying a home, may now avoid these districts altogether? **How has the district attempted to measure this and how will they mitigate it going forward with transparency?**

Response: School districts across the nation, including Oregon, are facing budgetary and enrollment challenges. It would be difficult for the district to predict or measure how these public processes might influence what individual families choose to do in the future. It’s worth noting that the Small Schools Task Force is a citizen process that was created based on direction from the School Board-appointed Long Range Planning Committee.

2. It's clear that many families lost trust in the public system during COVID and have not returned. The proposed move to close or consolidate schools could further erode that trust. **What is your response to this?**

Response: The district does its absolute best to provide optimal learning environments and outcomes for all WLWV students.

3. Community Considerations for Bolton Primary: Bolton Primary is located in a historic section of West Linn and is part of the Historic Bolton Neighborhood Walking Tour. It sits on the original 1890 Bolton townsite and is an integral part of West Linn's local history. The school is surrounded by historic landmarks, as designated by the City of West Linn on their planning website. **What community considerations have been deliberated regarding Bolton Primary's historical significance, and can we see the results of those deliberations?**

Response: The Small Schools Task Force was created to investigate the long-term feasibility of the district's smallest schools amidst budgetary and enrollment challenges, in order to provide findings for the Long Range Planning Committee to consider. All reports and information generated as part of the SSTF process are being uploaded to the district website.