SUN Service System Sponsors Meeting
October 21, 2008
1:30 -3:30 p.m.
American Institute of Architects Offices, 403 NW 11th Avenue

MEETING NOTES

Attendance

Sponsors Present: Ted Wheeler, Bob McKean, John Miner, Bruce Goldberg, Dan Saltzman, Ronald Gould, Ron Hitchcock, Karen Gray, Sam Adams, Barbara Rommel, Zeke Smith, Joyce Henstrand, Nate Waas Shull

Council Members Present: Lolenzo Poe, Lisa Turpel, Lisa Pellegrino, Joanne Fuller, Jerry Burns, Gloria Wiggins, Willie Poinsette, Barbara Kienle, Krista Larson, Bill Scott, Lori Silverman, Keith Biggs

Also Attending: Hector Roche, Maxine Thompson, Jim Schlachter, Peggy Samolinski, Mary Li, Dunya Minoo, Jane Ames, Diana Hall, Erin Whitemore, Lori Kenney

Executive Summary

Sponsors met to address what full Mutual Responsibility for the SUN Service System means, individually and collectively. After receiving an overview on work being done in three Coordinating Council workgroups, Sponsors engaged in a discussion about how to move forward with SUN during this time of deep economic uncertainty and budget shortfalls.

Key Themes from the Discussion:

Core Mission
- If "Every School a SUN Community School" is part of our core mission, and it seems to be that to DHS, we need to look at where our resources go and develop a different funding strategy.
- We should look at where we are delivering services; study how to leverage $$ to mutually meet our core missions.
- Do we find new resources or use existing resources based on a targeted mission? Do we need to use existing resources in a different and better way?
- If we have the right model that leads to academic success and self-sufficiency, our core mission will be the leading edge of all partners' individual missions.
- We should look at delivering services in ways to mutually match our missions.
- For our school district, not all the SUN goals are the school's core mission.

Commitment to SUN
- SUN is our community template for delivering anti-poverty services in an efficient manner.
- Would like to see expansion. "SUN is absolutely core. I'm not willing to let it go."
- We are committed to SUN. In order to move kids through the system, the regular school day isn't enough. We need to address education in different ways. If we don't address anti-poverty now, we will end up doing so in the classroom.
- SUN allows us to get to families through the schools.
- We are going to spend money somewhere to address these issues. We are committed to using the SUN model. It works. We can monitor, modify and adjust according to the data, but don't start moving families.

- Fully, absolutely committed as a full partner.
- We already have lots of money invested in our schools (buildings and services). We have to start thinking differently to work more efficiently and effectively. After Katrina, a New Orleans community explored how to rebuild itself and determined it was most efficient to house everything in one facility (schools), rather than building separate buildings for DHS, Parks, etc. They were surprised they had not thought of this innovative solution before.
- We want to keep what we have because it is working, and expand it.
- SUN is a core service for our schools; every school that has SUN wants to keep it.
- These difficult times offer an opportunity to work together to prove our leadership.
- I am interested in client-based service delivery and like school-based delivery for children.

System and Funding Comments
- We should be contacting the business community for funds. Although they are actively involved at individual sites, they are not at the Sponsor level at this time.
- From a historic context, we have always served families; we just moved the focus from the community to being school-based. With kids in the classrooms, we can effectively reach the families through that child.
- We need to focus on improving the lives of families and ensure the links are there for families.
- Want to align existing funds in the smartest way. We need to find out who is doing what and determine if it is the most effective way.
- I like the levy idea, but think the community is not ready right now.
- Approximately $2 million is passed through from DHS in wrap around services, devoted to anti-poverty.
- Currently, there is not much funding for case management.
- Last year we undertook an extensive process to define poverty and the levels of poverty as part of the definition of allocation methodology. This led to some shifting in funding.

Resource Realignment
- Karen Gray, Parkrose, offered to bring some Title I funding to the table. Since Parkrose lost its 21CCLC grant this year, they have been using Title I to fund after school activities.
- Bob McKean, Centennial, will reconsider use of Title I funds.
- Zeke Smith, Portland Public Schools, can absolutely look at Title I, SES and other support dollars. A contribution might fit in a different box as we move forward.
- Bruce Goldberg, DHS, sees this as part of their core mission and is willing to put resources on the table for Anti-Poverty, Mental Health and Early Childhood. He is also willing to consider the option of redeploying case workers into schools. He doesn't see this as a "one size fits all" situation - it's not either school or community delivery, but both.
- John Miner, Gresham Barlow, is willing to mutually match missions and look at Title I funds.
- Recognition that those who put cash into the system tend to be more fully committed to sustaining it.

Issues to be Resolved/Action Items
- Sponsors need to know what kind of cash it will take to maintain SUN.
- Uncertainty about what Mutual Responsibility means for each organization and which column on the Contributions sheet it refers to. How we define mutual responsibility in terms of this conversation is key.
- Sam Adams queried whether SUN is the best way to reach families. Could the Prosperity Alliance serve as a stronger platform for reaching families? Perhaps SUN could stay with education and students; the Alliance would work with families. During this time of budget cuts, he would like to focus on procuring rather than providing services and a trackable client-based system and delivery of services.
- Would like to know who is doing what, and if it is the best way to be doing things.

- Lolenzo Poe reminded Sponsors of another area of concern: The disproportionate suspension and expulsion of students of color needs to be addressed.

Next Steps

- Lolenzo Poe received agreement from Sponsors to address some of the issues raised today through the Coordinating Council and/or its workgroups.
- Chair Wheeler said the County budget would be released next week, giving more clarity on what funding will be needed to maintain the system.
- Coordinating Council will follow up with districts willing to discuss Title I funds.
- A follow up meeting will be scheduled in the next several months to address funding issues prior to partner budgeting.

Detailed Meeting Notes

Welcome

Chair Wheeler welcomed everyone and thanked Sponsors for their leadership and commitment to provide oversight of policy decisions and guidance for the SUN Service System. He welcomed Ron Hitchcock from the Multnomah ESD and said although Ron is not an official "Sponsor", the issues we are addressing called for his presence and participation. The Chair also thanked Maxine Thompson and Leaders Roundtable for their financial contribution covering fees for the meeting space.

Self Introductions and Hopes for the SUN Service System

Facilitator Hector Roche asked everyone to introduce themselves and asked Sponsors to briefly describe their hopes for the SUN Service System. Hopes shared were:

- Ability to serve students most in need
- Continued work to integrate all services in schools
- Be in all elementary and middle schools
- Sustain the current level of funding and services for SUN and expand, with creativity
- Hope: SUN in all schools. Fear: We'll reduce services just when we need it most
- Don't want to lose any SUN services. Expansion is a great goal. Would like expanded place for youth voice at the table.
- System integration and data evaluation are two key areas
- Continue to work toward a common set of outcomes
- SUN is supporting kids in important ways; Dream of having services fully integrated and more SUN Schools
- Evidence-based prioritization of services

Meeting Purpose

Chair Wheeler reminded Sponsors that we had agreed to come back together when important issues merited our attention and require leaders to engage in joint problem solving. The Chair's hope for the meeting is to engage in a frank discussion about mutual responsibility for the SUN Service System and

what that means, particularly during difficult economic times. He noted several examples of how Sponsors are collaborating already, contributing, and engaging in alignment efforts:

- Continued commitment of operating cash and in-kind contributions of many Sponsors and partners.
- The City of Portland, as part of what was called the Schools Family Housing effort, contributed rent assistance money into the SUN Service System, leveraging the Touchstone school based case management capacity in the system and stabilizing over 120 families in this joint effort.
- DHS initiated a focused integration effort with SUN and dedicated a .5 FTE staff person to make action happen.
- School districts continue to provide significant in-kind in the way of building space, nutrition services and staff time. In addition:
  - PPS is integrating Supplemental Educational Services bringing targeted tutoring in a number of SUN Community School sites
  - Mid and East County schools are partnering to provide transportation
  - David Douglas is planning at the district level for a significant amount of Title I $ to support academic and family involvement as part of SUN
- CHIF is supporting both operational and programmatic pieces in after school, using the SUN infrastructure to do so.

Before the discussion of mutual responsibility, we want a chance to hear updates from the Coordinating Council and have a chance to dialogue about their work and recommendations. These updates will help inform and support the discussion. The Chair recognized the commitment and level of partnership demonstrated by the Council, which has been meeting every two weeks for over a year and a half.

SUN Coordinating Council Overview of Priority Work Areas

Coordinating Council Chair Poe thanked Council members for their hard work over the summer on system integration, data and evaluation, and mutual responsibility. As part of that work, the Council has recognized that to achieve maximum efficiency and integration, we need SUN in every school. He introduced the work group chairs to give the following updates:

System Integration and Alignment
Joanne Fuller reviewed the Update to Sponsors document from the workgroup, including the initial charge for the group. She reported that the System Integration and Alignment work group will be working on integration and alignment for a long time and highlighted the work that has happened so far.

The work group has broadened the group of people/organizations they are working with, focusing primarily on students and families in poverty. She echoed Chair Poe's suggestion that system alignment efforts would occur much more easily if every school was a SUN Community School, making it much easier for the myriad systems involved to plug into a known and successful platform. She recognized the irony of bringing this up at a time when everyone is struggling financially, but emphasized it is an aspirational goal and these are the times when families we serve are hit hardest, and thus the need for support is even greater.

Jerry Burns provided an overview of the alignment effort underway between DHS and SUN, despite funding deficits. He stressed that these are the times we most need to work together, staying at the table to address these tough issues together.

The DHS/SUN Partnership began with DHS dedicating .5 FTE to lead systems integration work. They discovered that although there is overlap in the clients served, the two systems each have minimal

knowledge of the details of each other's processes and services. There have not been any individually identified contact points, shared service provision, or joint case management efforts. He described a few of the steps they have taken so far:

- Meeting regularly to identify and act on concrete alignment efforts.
- SUN staff attended summer trainings for all DHS staff to increase knowledge about System services.
- Questions about children's progress/success in school have been added to DHS's comprehensive assessment, recognizing how critical school success is to self-sufficiency. This has now spread to be part of the statewide assessment tool.
- Many of the ideas generated this summer at an Economic Self-Sufficiency brainstorming are being addressed:
  - o Piloting an on-line food stamp application with SUN and PPS
  - o Identifying a point person/liaison at each SUN Service System site and DHS branch
  - o Piloting a shared case management approach – the plan is to start with the Teen Branch of DHS and SUN providers to support high school completion
- Although DHS is understaffed, they are committed to dedicating staff to this important and mutually beneficial alignment effort.

Joanne described the good cross section of "return to work" professionals who attended a conversation on Economic Self-Sufficiency alignment opportunities on August 21st, and shared the actions that have come from that discussion. Plans are underway to focus on mental health as the next area of integration and alignment. Mental health began the year providing training for PPS counselors and staff about mental health issues, services and access. Her intention is to focus on ways to provide better mental health services for the students in our system.

Questions/Comments:

Q: Can we get SUN into all Schools with existing resources?
A: No, but we can work on how to better align and deepen services with existing resources. In addition to having a SUN Community School Site Manager at each school, which is key, regional and culturally specific services wrap around and flow through regional centers. We would need to determine how to enhance needed services at each site. We are currently in 53 out of the 150 schools in the County.

Data and Evaluation
Lisa Pellegrino provided an overview of the work group efforts to identify common outcome measures and data points that can be tracked for all funders of the SUN Service System. Each of the current funders (Multnomah County, Children's Investment Fund and Connected by 25) tracks different data and outcomes, as shown on a matrix provided for participants. Most of the needed data resides within schools and school districts. Different organizations make requests at different times to the same entities for the same or similar data. The goal is to define what data is needed, how to best get that data and then to approach the school districts and the Multnomah ESD to see what is feasible in terms of streamlining.

Progress has been made in reducing the number of data points for which funders would require data. As the workgroup looked at common data points, they reviewed a wide range of research on community schools, before and after school programming, effects on student performance and outcome measurement. The current data points fall into various categories including attendance, grades and benchmarks. Because their objective is to provide key information about how children are performing and indicators of success, the workgroup agreed it is important to track progress being made toward benchmarks in addition to those who are meeting benchmarks. Information on poverty will be collected to better understand the population SUN serves. Partners will continue collecting some behavior points on their own, given the variance in specific interests across the partners.

If schools are supportive at the district level, the workgroup would like to develop an agreement to allow the ESD to provide aggregate data and will be working to determine the most efficient way to do that. Lisa let sponsors know the workgroup will be contacting them to discuss these issues further.

Questions/Comments:

Q. Why does data need to be collected by each funder? Wouldn't all funders buy in to one set?
A.   We need to be accountable to specific funders' interests and requirements but it would enhance efficiency a great deal to not have to go to several places for different data.

The workgroup has also been discussing three potential areas for evaluation:
- System Evaluation: To determine the extent to which the SUN Service System is working well and meeting stated goals (creating effective interagency coordination amongst partners, developing an integrated system that facilitates client access, information sharing among providers, and information and referral systems for community partners).
- Service Quality Evaluation: To determine whether all components of the system are delivering quality services and how quality can be improved.
- Outcome Evaluation: To determine whether and to what extent the SUN Service System results in child specific or adult outcomes.

Lisa noted that causal evaluation is very difficult to undertake (i.e. did program/intervention "x "cause student "y" to do better, while controlling for all other variables that may also be contributing to the result). There is general agreement amongst workgroup members that a causal evaluation would be prohibitively expensive, given the number and variety of interventions throughout the SUN Service System.

The workgroup is interested in evaluating service quality and system performance. The most beneficial aspect to the system could be looking at the quality of service delivery with the goal of refining it, developing best practices and implementing quality standards.

Questions/Comments:
- The evaluation the work group is recommending would help us determine whether what we are providing is producing the outcomes we want
- Pleased to hear that we are not planning home-grown longitudinal studies. Believe that there is proxy data based on current research that can show the results from effective use of best practices.
- Outcomes are important to the County as a major funder because the County will get asked why the County is involved in education. SUN's presence in education is the County's major anti-poverty strategy.
- Data collection is a huge challenge for all of us. Factoring in all the different interventions occurring in each district would be very tough. We need to develop a broader picture of what the data means, including use of anecdotal information.
- Commend the workgroup for what they have accomplished in integrating across systems. We need to recognize that SUN is not just another educational tool. It offers a real value for schools to align in support of the many outcomes we are working toward.
- As we talk about Mutual Responsibility, we need to be clear this is not just educational money. We need to look at how we can align a wide range of services to support educational outcomes.

Q. What does it mean when you talk about higher quality leading to better outcomes?
A. One example would involve organizations offering incentives to increase staff retention, thereby enhancing the possibility for students to develop relationships with staff that supports their success.

Mutual Responsibility

Lisa Turpel provided some background on the Coordinating Council's interest in focusing on mutual responsibility. In many ways, deepening services and improving outcomes depends on a greater commitment to mutual responsibility for the system. Moving beyond our cooperative relationship to a more collaborative partnership is analogous to the Early Childhood difference between parallel and interactive play. She referred Sponsors to the written definition developed for Mutual Responsibility, noting that Mutual Responsibility involves greater collaboration as well as greater return. She also shared the work group's recommendations for the commitments required of true mutual responsibility and the benefits from that level of collaboration.

Both the Mutual Responsibility and System Integration workgroups saw need for a succinct overview of the SUN Service System so those outside the system could easily grasp what it was about. Joanne Fuller walked the group through the two-page *Overview of the SUN Service System*, noting how the atomic diagram shows each partner has work outside SUN but that all partners come together where their work for school-age children and families overlaps within the SUN Service System. The contributions information describes cash, in-kind and matching contributions to the SUN Service System. System Outcomes describes outcomes in a variety of areas, including academics, behavior, attendance, family stability and mental health. This document will be helpful to our discussions as we work toward "Every School a SUN Community School."

Lolenzo Poe introduced a short video depicting the dramatic impact of the SUN Service System on a student's academic performance and his vision of what might be possible in his future. Through this student's involvement in SUN, he was supported and challenged to imagine a greater scope of possibilities for the future. Although the student initially wasn't sure he would graduate from high school, through the support of SUN, he turned into an A student, became an accomplished athlete and emerged as a positive leader amongst his peers.

Sponsors Take the Lead: Mutual Responsibility

Chair Wheeler began the discussion by making several key points:

- When this system was started by the County, City and schools, it was a visionary system, based on a collaborative model.
- Over time, the County became one of the major players, primarily because of the wrap-around services.
- In the past two years, conversations with a number of sponsors repeatedly come back to this great vision and the positive outcomes it has produced.
- Everyone at the table has made an investment in this model. Although the County has made the biggest investment, it cannot continue being the primary partner. The County is facing a budget shortfall and another set of expiring 21CCLC grants. The grants expire in a staggered format, with diminishing annual funding. Marshall's grant will expire next year; two expire in 2010; one in February of 2011; one in June of 2011.
- While we clearly do not have the resources needed for expansion, with the current budget projection, we may not even be able to meet current services.
- We are all under the same financial pressures, but we need to problem solve about this together. Perhaps we should be looking at joint operating levies or making regional asks.

The Chair asked Sponsors to take leadership in describing what a true mutual responsibility for the support of the SUN Service System means, asking, "If we all care about the System, how are we going to support it?"

The Chair talked about getting beyond incremental chunks of funding that cobble together a system and focusing on an overall funding strategy. Sponsors recognized the need for a sustainable system based on values, but cobbling together is what they have always done. If our model both provides avenues for academic success and economic self-sufficiency, then it meets the County's core mission.

See the Executive Summary at the beginning of this document for information on the discussion that followed.

Next Meetings

Next Sponsors Meeting: To be determined

SUN Service System Coordinating Council:
Friday, November 21, 2008
8:30-10:30 a.m.
Multnomah Building,
Room 112
501 SE Hawthorne