

Allocation Methodology Recommendations for SUN Service System

October 18, 2007

Parameters

When the Allocation Workgroup began meeting, the County Chair and the Director of the Department of County Human Services instructed us to make allocation methodology recommendations within the following parameters:

1. Assume that allocations between the different service areas of the SUN Service System (SUN Community Schools, anti-poverty services, Parent-Child Development services, Social and Support Services for Educational Success) would stay roughly the same; and
2. Assume that the County would continue to use approximately 30% of the total SUN Service System resources to fund culturally specific services.

Allocation Principles

1. Allocate resources based primarily on poverty.
 - For School-Based services: Poverty drives the location of services
 - For School-Linked services: Poverty drives the percentage of funding allocated to a service region
2. Assure a base level of service geographically spread across the county for both school-based and school-linked services.
 - For School-Based services: Use high school catchment areas as the geographic basis for allocating programming.
 - For School-Linked services: Use the six SUN Service System regions as the geographic basis for allocating other SUN Service System resources.

I. School-Based Services

DEFINITIONS

School-based Services: Includes the SUN Community School (SUN CS) program and school-based case management services currently delivered through the Touchstone program.

High School Catchment Areas: Refers to groupings of schools in which the elementary schools feed into the middle school and the middle schools feed into the high school. For purposes of these recommendations, high school catchment areas are defined as follows:

Barlow	Centennial	Cleveland	Corbett	David Douglas
Franklin	Grant	Gresham	Jefferson	Lincoln
Madison	Marshall	Parkrose	Reynolds	Riverdale
Roosevelt	Wilson			

Alternative, charter and magnet schools are not included in the high school catchments, and the recommendations for allocation of school-based services do not apply to these school sites since they draw their attendance from across the district(s) and not through a geographically based catchment system. The county and other providers currently provide services for eligible students attending these types of schools through a variety of other programs.

Poverty Index: The Poverty Index was developed by Multnomah County to rank the relative poverty of the populations attending each school in the county. Each school has a rank that equally weights the **percentage** of students participating in the federal Free and Reduced Price Lunch Program (FRL), and the **number** of students participating in the program. The rank is derived by first separately ranking the schools by the percentage of children participating in FRL and by the number participating in FRL. These two ranks are then averaged to yield the final rank.

The Committee then divided the ranked list of schools into quartiles such that the 1st quartile includes the schools with the highest ranks for poverty and the 4th quartile includes the schools with the lowest ranks for poverty. A copy of the index that includes the rank of each school and the quartile of the index into which each school falls is attached to these recommendations for reference.

RECOMMENDATIONS

1. Allocate a base level of resources in all high school catchments where the high school is in the top three quartiles for poverty using the Poverty Index. Lincoln, Riverdale and Corbett catchments do not qualify to receive a base level of funding because these three high schools are in the 4th quartile of the Poverty Index.

Allocate a base of 1 SUN CS site in each of the qualifying high school catchments. Maintain the currently operating sites serving the highest poverty population in the catchment area.

Based on this principle, the following currently operating SUN CS sites would continue operating:

- Hall ES (Barlow catchment)
- Centennial MS (Centennial catchment)
- Grout ES (Cleveland catchment)
- Alice Ott MS (David Douglas catchment)
- Arleta ES (Franklin catchment)
- Sabin ES (Grant catchment)
- East Gresham ES (Gresham catchment)
- King ES (Jefferson catchment)
- Rigler ES (Madison catchment)
- Marshall HS (Marshall catchment)
- Shaver (Parkrose catchment)
- Alder (Reynolds catchment)

- James John (Roosevelt catchment)
 - Markham (Wilson catchment)
2. Minimize site changes between high poverty sites within a cluster. Based on this principle, the Committee recommends that all existing SUN CS sites that are ranked in the 1st or 2nd quartiles of the Poverty index be maintained.
 3. Shift resources from currently operating sites with relatively lower poverty rankings. Based on this principle, the Committee recommends that all existing sites ranked in the 3rd and 4th quartiles of the Poverty Index in excess of the 1 “base” site **EITHER**
 - (a) receive a reduced government subsidy (75% of current funding level) with saved resources moving to higher poverty sites, **OR**
 - (b) relocate to a higher poverty site, prioritizing existing sites where time limited grants are funding current services.

The following currently operating sites would **either** be relocated **or** receive 75% of the current government subsidy:

- Dexter MS (3rd quartile; Gresham catchment)
 - Beaumont MS (3rd quartile; Grant catchment)
 - Mt. Tabor MS (3rd quartile; Franklin catchment)
 - Sellwood MS (3rd quartile; Cleveland catchment)
 - Buckman ES (4th quartile; Cleveland catchment)
 - Robert Gray MS (4th quartile; Wilson catchment)
 - Jackson MS (4th quartile; Wilson catchment)
 - Fernwood MS (4th quartile; Grant catchment)
 - Clear Creek MS (3rd quartile; Gresham catchment)
 - Metropolitan Learning Center (4th quartile; Lincoln catchment)
4. Consider multiple factors when determining relocation or funding reduction for a site including funder needs and restrictions, decisions on core services, school district and school site readiness/willingness to host a site, the ability of the school population to pay fees for after-school programs, and expiration of grant funding for current sites. Add new SUN CS sites with saved or new resources using the Poverty Index, with priority to schools in the top quartile of the Index.

Based on these factors, the Committee recommends the following:

- (a) The current SUN CS site located at the Metropolitan Learning Center be relocated because this site is in the Lincoln cluster, and as noted above, Lincoln High School is in the bottom quartile of the Poverty Index. High school catchment areas in which the high school falls in the bottom quartile of the Poverty Index are not guaranteed school based services. The Committee recommends this site be relocated to Alder Elementary (highest poverty school in city/county; grant funded services expiring at end of FY 2007/2008).

- (b) The current SUN CS site at Mt. Tabor MS be relocated to Ron Russell Elementary (highest poverty site without SUN CS services).
 - (c) The current SUN CS site at Beaumont MS be relocated to Marshall High school to assure ongoing operation of the program there where a majority of grant funds will expire at the end of FY 2007/2008.
 - (d) The Committee recommends that funding for SUN CS services at the remaining sites listed in recommendation 3 above be reduced to 75% of the current government subsidy as soon as current contracts for services expire. (Dexter MS, Sellwood MS, Buckman ES, Clear Creek ES, Fernwood MS, Jackson MS, Robert Gray ES)
 - (e) The Committee recommends that savings be applied first to maintain the current SUN CS program at Davis Elementary (top quartile in poverty index; grant funded services expire at end of FY 2007/2008), and next to the highest poverty school listed in the index without a SUN CS program.
5. If any schools in which the SUN CS program is operating are closed, or if new schools are opened subsequent to the implementation of these initial recommendations, the Committee recommends that the Coordinating Council discuss the impact of school closures or openings on the SUN CS system and make recommendations for relocation of SUN CS services if necessary.
6. The county should re-compute the poverty rankings of all schools in the county after three years of the contract period for SUN CS services has ended and provide the new rankings to the Coordinating Council. The Council should review the updated rankings and recommend adjustments in per site funding or location of services if necessary.

II. School-Linked Services: Anti-Poverty Services

The county currently allocates anti-poverty program funds as follows:

- 33% of total anti-poverty funding is allocated to culturally specific services which are countywide;
- 75% of the remaining funds are allocated to serve families in poverty with related children;
- 25% of the remaining funds are allocated to serve individuals in poverty;
- The percentage of families in poverty with related children and the percentage of all people in poverty is computed for each region based on 2000 census data;
- The percentage of families in poverty with related children for any given region is then multiplied by the total funds allocated to serve families in poverty to compute the allocation for the region. The same calculation is performed to arrive at the allocation of funds to serve individuals in poverty for each region.

RECOMMENDATION

The committee recommends that the county continue to use this formula to allocate anti-poverty funds, but that the data used to compute the percentage of families in poverty with

related children and the percentage of all people in poverty for each region be updated before the county contracts for these services in FY 2008/2009. The committee recommends that the county hire a qualified consultant to project poverty trends throughout the county based on the most recent available data on the number and percent of families with related children, and individuals in poverty in each region.

III. School-Linked Services: Social and Support Services for Educational Success

The county currently allocates funds for Social and Support Services for Educational Success (SSSES) as follows:

- Approximately 15% of available funds are allocated to regional providers (the “Regional Funds”) to provide services to 13-17 year olds at risk for academic failure. Each region receives the same allocation regardless of population.
- Approximately 85% of available funds are allocated to culturally specific services for children aged 6-18 who are at risk for academic failure (the “Culturally Specific Funds”) in the following cultural groups: African-Americans (19.7% of funds), African immigrants (8.11% of funds), Asian and Pacific Islanders (20% of funds), Latinos (28.7% of funds), Native Americans (13.9% of funds) and people of Slavic origins (9.59% of funds). Contractors for culturally specific services must provide services countywide.

RECOMMENDATIONS

The committee recommends that the county use the following formula to allocate Regional Funds:

1. Cease allocating an equal and flat amount of funds to each region and instead allocate funds based on the percentage of the target population living in a region.
 - a) Using the projection data developed in connection with the recommendation for allocation of anti-poverty funds, calculate the number of poor 10-18 year olds in the county, and in each region at a given point in time. Calculate the percentage of the entire population of poor 10-18 year olds that resides in each region.
 - b) Allocate funds for each region based on percentage of the total poor 10-18 year olds in that region.
 - c) If the funding level for a region falls below a reasonable “base amount” to provide services, consider contracting with fewer providers to offer services over a larger geographic area.
2. The committee considered, but could not agree, that the county should also take into account the percentage of the target population in the region that receives culturally specific services in allocating the regional funds. Committee members were divided on whether it would be worth the effort to gather and apply this data in the formula.

3. The committee recommends that the county gather or procure better and more accurate data on the portion of the county population that each cultural group makes up, and on the total number of members of each cultural group in the county.
4. In the context of committee discussion of allocation of resources for SSSES services, some members of the committee asked that the county reconsider its division of resources between the various components of the SUN System, as well as its division of resources between culturally specific services and mainstream services. A consensus was not reached on this point, but committee members advocated strongly on both sides of the issue.

IV. School-Linked Services: Parent Child Development Services

The county currently allocates funding for Parent Child Development Services as follows:

- One half of the funding goes to culturally specific services with six providers each receiving the same amount of funding to provide countywide services to the relevant cultural group (the “Culturally Specific Funds”).
- One half of the funding is divided equally between the six regions (the “Regional Funds”).

Recommendations

The committee recommends that the funds for Parent Child Development Services be allocated as follows:

1. Cease allocating an equal and flat amount of funds to each region and instead allocate funds based on the percentage of the target population living in a region.
 - a) Using the projection data developed in connection with the recommendation for allocation of anti-poverty funds, calculate the number of poor 0-5 year olds in the county, and in each region at a given point in time. Calculate the percentage of the entire population of poor 0-5 year olds that reside in each region.
 - b) Allocate funds to each region based on the percentage of the total poor 0-5 year olds in that region.
 - c) If the funding level for a region falls below a reasonable “base amount” to provide services, consider contracting with fewer providers to offer services over a larger geographic area.