



Building a Brighter Future for Kids and their Families

Core Services & Allocation Methodology Recommendations

SUN Service System Coordinating Council

December 7, 2007

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INTRODUCTION

This document contains an overview of the Coordinating Council work and its recommendations to leaders and policy makers on two specific areas related to the SUN Service System: core services and allocation methodology. These recommendations will be considered and incorporated into the budgetary and programmatic decisions of the SUN Service System partners.

BACKGROUND

In February 2007, the School Age Services Task Force culminated with the release of a report containing recommendations for how the County, with its partners, could strengthen and streamline services for children and families. The report included a recommendation to establish a Coordinating Council for the SUN Service System for the purpose of ensuring shared responsibility, coordination, and system oversight.

The SUN Service System Coordinating Council began meeting in April 2007. Membership configuration is based on the recommendations of the School Age Services Task Force and is comprised of key system partners, including Multnomah County, school districts, non-profit organizations, Oregon Department of Human Services, and the City of Portland. Lorenzo T. Poe, representing Multnomah County Office of Chair Ted Wheeler, is the Chair of the Coordinating Council. A list of Coordinating Council members can be found in Appendix C.

COORDINATING COUNCIL CHARGE

The charge of the Coordinating Council as set forth by the School Age Services Task Force is as follows:

The Council should consider and recommend the key functions of the SUN Service System, including but not limited to:

- a. Sustainability of the SUN Service System*
- b. Sustainable funding & allocation of resources*
- c. Structure and purpose of the system*
- d. Evaluation and achievement of outcomes*
- e. Service standards & best practices*
- f. Guidance for percent of resources to be dedicated to direct services*
- g. Definition of roles and responsibilities for the SUN Service System*
- h. Further definition of core services*
- i. System expansion/contraction*
- j. Coordination of technical assistance*
- k. Review and adjustment (as necessary) of Memoranda of Understanding related to the System*

Upon formation, the Coordinating Council prioritized its work based on the necessary sequencing of tasks and critical timelines among the partner organizations. As the workplan and timeline were developed, two priority areas of work emerged: definition of core services and allocation methodologies.

PROCESS

The timeline for identification of recommendations for core services and allocation methodologies was hastened by an immediate need by the County to define these issues for the SUN Service System procurement process to take place in Winter 2008 and by budget timelines in all the jurisdictions. In order to accomplish this in the established timeframe and ensure broad input and participation by community groups and other stakeholders, the Coordinating Council formed two workgroups, the Core Services Workgroup and Allocation Methodology Workgroup. Both workgroups were chaired and had participation from members of the Coordinating Council, along with participation from a broader group of community and partner representatives.

Core Services Workgroup

This workgroup met nine times from June-October 2007, including a culminating joint meeting with the Allocation Methodology Workgroup. A total of 31 people participated in the workgroup, representing community organizations and local government, including City of Portland, Multnomah County Department of County Human Services, Health Department, and Commission on Children and Families, Oregon Department of Human Services, and local school districts and service providers. Joanne Fuller, Director of Multnomah County Department of County Human Services, served as the Chair of this workgroup. A list of Core Services Workgroup participants can be found in Appendix C.

The Core Services work included recommendations for the following:

- Target population
- Long-term system outcomes
- Partnership definitions
- Core services

Allocation Methodology Workgroup

This workgroup met ten times from June-October 2007, including a culminating joint meeting with the Core Services Workgroup. A total of 21 people participated in the workgroup, representing community organizations and local government, including the City of Portland, Multnomah County Department of County Human Services, Oregon Department of Human Services, and local school districts and service providers. Lisa Pellegrino, Director of the Children's Investment Fund for the City of Portland, served as the Chair of this workgroup. A list of Allocation Methodology Workgroup participants can be found in Appendix C.

The Allocation Methodology work included recommendations for the following:

- Overarching allocation principles
- Specific allocation methodology for school-based and school-linked services

Coordinating Council

The recommendations were presented to the Coordinating Council in October 2007. Coordinating Council members then briefed and solicited input from key leaders and groups they represent in order to incorporate this feedback into the final recommendations. The recommendations were finalized and approved by the Coordinating Council at the end of November 2007.

CORE SERVICES RECOMMENDATIONS

OUTCOMES

Based on the School-Age Services Task Force recommendations, the following long-term outcomes were identified for the SUN Service System:

- ❖ Prosperity
- ❖ Desirable Places to Live
- ❖ Academic Success
- ❖ Healthy Kids & Families
- ❖ Children Ready to Enter School (0-5 years)

TARGET POPULATION

The primary target population of the SUN Service System is school-age children and their families (K-12) with the long-term vision of expanding this to include early childhood services and programs.

PARTNERSHIP DEFINITIONS

The SUN Service System consists of two levels of partner participation. The expectations, roles and responsibilities of the partners are dependent on their level of participation in the system.

COLLABORATION <i>Creating A New System</i>	COORDINATION <i>Sharing Resources</i>
Integrated	Coordinated
Collaboration	Partnership
Shared vision, mission, results and impacts	Resources shared for common issues
Priority Referrals	Referrals
Must use SUN Service System Allocation Methodologies	May use SUN Service System Allocation Methodologies
Included in the SUN Service System Memorandum of Understanding	Working Agreement Established
A SUN Service System Core Service	Not a SUN Service System Core Service
Funding and program decisions made jointly	Shared decisions for common issues
Must jointly contribute to the system	May contribute to the system

For most partners, not all the services that the partner delivers are involved in the SUN SS on a collaborative or coordinated level. A partner may have some services that are involved at a collaboration level, some at a coordination level, and some that are not involved in the SUN SS.

The core services of the SUN Service System are those that partners plan, fund, and deliver in *collaboration*.

CORE SERVICES

The following services were identified as core to the SUN Service System. These services are critical drivers to the long-term outcomes, and partner participation in relation to these services needs to exist on a *collaboration* level in order for the SUN Service System to be successful in meeting its outcomes. These services are delivered school-based, school-linked, or a combination of both.

Service Access, I&R, Linkage

Facilities

Transportation

Site Management/Service Integration

Academic Support and Skill Development

- Case Management¹
- Attendance Support
- Tutoring/Mentoring
- Enrichment/Recreation
- Homework Assistance
- Summer Programs
- Student Internships, Youth Employment Training, Meaningful Youth Job Opportunities
- Life Skills Development²

Parent & Family Involvement/Support for Academic Success

- Parent Support & Life Skills Development
- Interpretation/Translation Services
- Parent & Family Engagement

Anti-Poverty

- Capacity for relationships with families (Case Management)¹
- Anti-Poverty Education and Support
 - Financial Literacy
 - Adult Education
 - Life Skills
 - Self Advocacy
 - Linkage/Brokering
 - Soft Employment Skills
- Housing Stability
 - Rent Assistance
 - Housing Support
 - Permanent Supportive Housing
 - Systemic Landlord Support
- Economic Self-Sufficiency

- Workforce System Connection/Linkages
- Vocational Education & Training
- Niche Work and Classes
- Basic Needs
 - Shelter
 - Food
 - Energy
 - Transportation
 - Clothing

Health

- School-Based Health
 - Primary Health Care
 - Prevention

Mental Health

- School-Based Mental Health
 - Screening & Assessment
 - Crisis Intervention
 - Individual, Family and Group Treatment
 - Environmental Intervention
- Addiction Services
 - Screening & Assessment
 - Treatment
 - Prevention & Outreach

1. **Case Management** is defined as a method of providing services and a collaborative relationship between a service provider and a participant. The functions of participant-centered case management include:

- Assessing strengths and needs
- Developing individualized action plans
- Coordinating all agencies, providers, and resources involved in the plan
- Monitoring, revising, following-up on, and evaluating action plans (as appropriate)
- Documenting contacts and services
- Advocating for organizational, community, and institutional responsiveness
- Using required knowledge of and access to resources in delivering direct services and client assistance funds (as available)
- Motivating, supporting, and mentoring individuals to maximize potential of achieving action plan goals and possibility for engaging in the larger community
- Looking beyond individual action plans to wider trends for the purpose of evaluating and refining the service system
- Seizing opportunities to influence social change
- Following-up after service completion (as necessary)

2. This encompasses a broad range of services, including but not limited to:

- | | |
|-----------------------|-----------------------------|
| ● Conflict Management | ● Communication Skills |
| ● Anti-Bullying | ● Social Network Building |
| ● Peer Mediation | ● Youth Violence Prevention |

ALLOCATION METHODOLOGY RECOMMENDATIONS

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 services for Target Outreach Populations (culturally specific services).

ALLOCATION PRINCIPLES

1. Allocate resources based primarily on poverty.
 - o For School-Based services: Poverty drives the location of services
 - o 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.
 - o For School-Based services: Use high school catchment areas as the geographic basis for allocating programming.
 - o For School-Linked services: Use the six SUN Service System regions as the geographic basis for allocating other SUN Service System resources.

ALLOCATION DEFINITIONS

School-based Services: Any services delivered at a school site including the SUN Community School (SUN CS) program.

School-linked Services: Services housed at sites other than schools. These services are delivered at various community sites, which may include schools.

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.

A list of existing SUN Community School sites organized by high school catchment areas can be found in Appendix B.

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.

The Poverty Index can be found in Appendix B.

SCHOOL-BASED SERVICES

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. Funders, in consultation with affected partners including school districts and schools, shall decide whether to relocate or reduce funding for a site, and where to apply saved resources or relocate services. Funders and partners shall consider multiple factors in making these decisions 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.
 5. If any schools in which the SUN CS program is operating are closed by the school district, or if new schools are opened by the school district 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 in consultation with funders and partners affected by the change, 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.

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 Target Outreach Populations 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.

RECOMMENDATIONS

The committee recommends that the county allocate 100% of the funds remaining after 33% of the total anti-poverty funding is allocated to Target Outreach Populations to serve families in poverty with related children. The committee recommends 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 in each region.

SCHOOL-LINKED SERVICES: SOCIAL & 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 Target Outreach Populations 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 6-18 year olds in the county, and in each region at a given point in time. Calculate the percentage of the entire population of poor 6-18 year olds that resides in each region.
 - b) Allocate funds for each region based on percentage of the total poor 6-18 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 SSSSES 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.

OTHER SERVICES

The county funds other services for school-aged youth (e.g. services for sexual minority youth, youth addictions, and gender specific services) that are delivered countywide. The committee did not discuss allocation of funding for these services and does not recommend any changes to the current methodology of providing countywide services based on program specifications.