Advisory Committee Meeting Notes
January 31, 2023, 6:30- 8:30 pm

Attendees: Ashley Walker (notes), Brooke Chilton Timmons, Molly Day, Janice Cole, Ana Muñoz, Jeff Renfro, Keinya Kohlbecker, Lavert Robertson, Leslee Barnes, Lydia Gray-Holifield, Petra Hernandez, Kathryn Torres, Andrea Paluso, Andres Avila (interpretation), Kimberly Moua, Koreen Barreras-Brown, Jaime Peterson, Sara Garcia Gonzalez

Kimberly Moua, Co-Chair of the Preschool for All Advisory Committee

- Opening Activity: Please share a "fork" and a "spoon." What's something you want to fork out of your life, and what's something you want to spoon more of into your life?

Today's Agenda

- Welcome & Opening
- Budget Planning
  - PFA Revenue Update from County Economist
  - FY 2024 Priorities
  - Discussion
- Evaluation Updates
- PFA Program Updates

PRESCHOOL FOR ALL
MULTNOMAH COUNTY

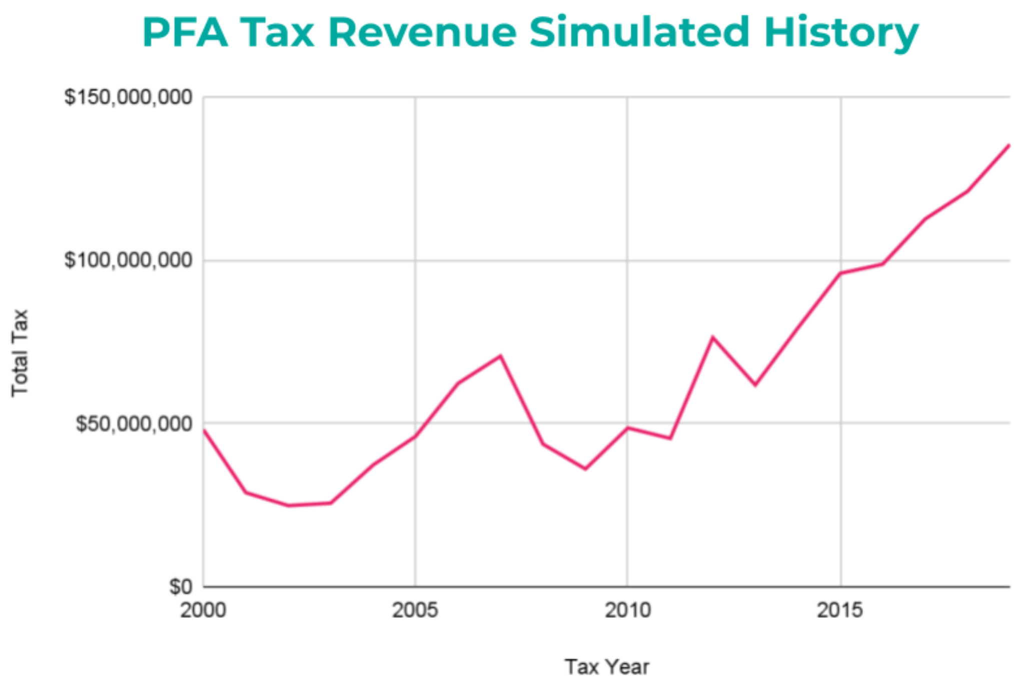
Brooke Chilton Timmons, she/her, Management Analyst

- Today we are going to be talking about the budget. We'll start with a revenue update from Jeff Renfro, then Leslee will run us through some of our FY 2024 budget priorities. Then we want to have a discussion with you all about what might be missing on that priority list, what else you want to hear more about, and also for our April meeting coming up: what parts of the budget process are you most interested in?
- Janice Cole is also back with us today. She was last with the Advisory Committee in May. Janice will share updates, particularly about the questions you all had about our evaluation planning, and again gather feedback and take that back as we continue our work. And then we'll end the meeting with some general program updates about the upcoming family application, workforce development, and the Preschool for All Facilities Fund.

FY 2024 Budget Calendar

- Mid-February: Department budgets due
- March: Program offers posted online
- April: Chair's Budget released
- Early June: Budget adopted

- To start out the budget conversation, I want to give you a quick overview of where we're at in the process. The budget process takes about six months. We've recently turned in our first draft of what the County calls program offers. Each program offer represents a different service or program or expense that is included in the County budget. All of these program offers come together to make the County budget. Program Offers will be available online in March, and in April, the Chair will release her budget. Sometime in April or May, we'll go back to the Board to give them an overview of our proposed budget. Then in early June, that budget will be adopted.
- At this stage in budget planning, we wanted to bring Jeff Renfro, County Economist here, to give you all an update, particularly about fiscal year 2022 revenue and tax collection. I'm going to turn it over to Jeff to walk us through the next few slides.



Jeff Renfro, he/him, County Economist:

- Let me start by saying, I love it when people ask questions, and I like it when people stop me and interrupt me. Please feel free - you don't have to wait until the end.
- A really significant advantage we have is that although this is a brand new tax, people in Multnomah County have been paying income tax for a long time. So what we were able to do is work with the State Department of Revenue. They did us an enormous favor and worked through old Multnomah County income tax returns. We sent them the tax code, we worked with them on how to do it, and they made - essentially - a fake history of this tax.
- If we had been collecting this tax for the last twenty years, this graph is more or less what it would have looked like. We had to make a few assumptions, so you probably shouldn't look at exactly how much we would have collected, but the point of all this is to get a sense of what this line looked like. How much variation are we going to see from year to year? If we have a recession, how much do we expect the revenue to go down? During periods of growth, how quickly do we expect this revenue to grow?

- And what this data tells me, as an economist, is that this tax is very volatile. That just means it can change a lot from year to year.
- There's a few reasons for that. One is that income-based taxes just generally move around, because income is tied to what's going on in the greater economy. During a recession, income is going to go down a lot. During an expansion, income is going to grow with the economy - usually at an even faster pace.
- The other thing here is that this tax is applied to a relatively small number of people, because it's only on higher income-earners in Multnomah County. Just the fact that it's a smaller group of people means that any one person, or any small group of people, can really sway the tax - especially if they're a really high earner.
- The other other piece is that higher-income people tend to make more of their income from capital gains, which is things like selling an asset that you made a good profit on. If you had stocks that did really well over a year and you sell those stocks and realize that profit, that turns into income that you pay the tax on. Capital gains, when we look at the history, we expect to be about 20% of our PFA revenue. That really moves around a lot.
- So when we look at this graph - over the last twenty years, if this tax had existed, we would have had two years where the revenue dropped by 40% going from one year to the next. We also would have had a year where the revenue went up by about 60%.
- The challenge with this is that we've established a program where people are going to expect a consistent level of service. It's my job and the PFA team's job to worry about this - people just want to know that if they sign up for the PFA slot, that slot is going to be there. All the rest of this should be invisible.
- So the challenge on our end is taking revenue that's going to be kind of chaotic and that's going to move around a lot, and then matching that to a program that's expected to be steady and consistent. So much of our approach is really informed by the challenge of putting these mismatched revenues and programmatic expectations together.

FY 2022 Tax Collection Update

	Revenue Projection	Revenue Collected	Difference
FY 2022 PFA Personal Income Tax	$119 million	$187 million	$68 million

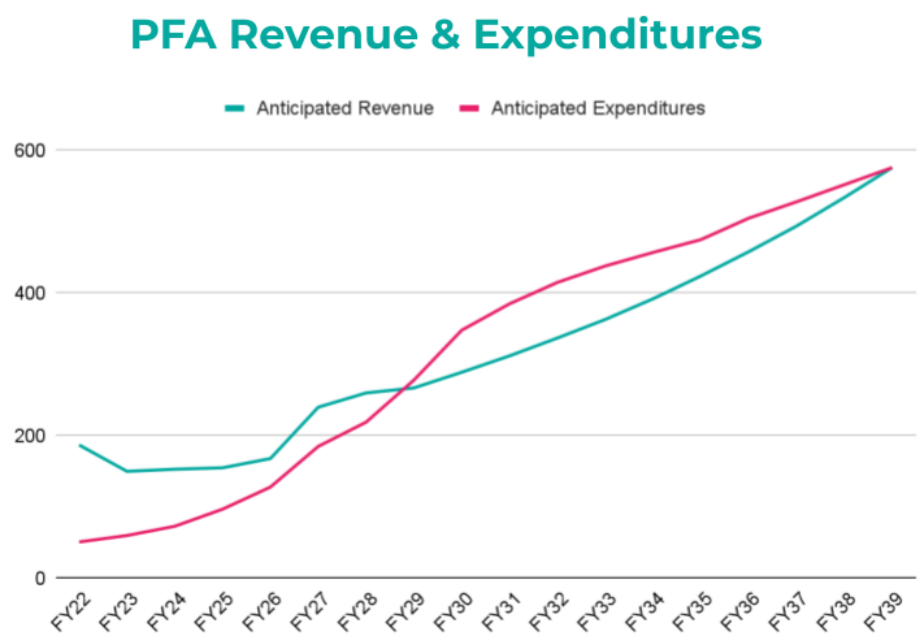
- Now we'll move into some of the specifics. When you look at the first year of the tax, our revenue projection when the budget was adopted was $119 million. We had a really good sense that we were too low. When we were coming up with our initial estimates of what the tax would collect in the first several years of the program, we knew that the actual collections would look something like that roller coaster shape of the last graph. When we're making an estimate, we're essentially drawing a straight line through what we think that shape is going to be.

- We knew that we were going to collect enough revenue to cover our expenses in the first year. And we knew that we were too low, and once we got more information, we would go back and refine our estimations.
- What ended up happening is that we collected a lot more than we expected. We collected over $187 million. That $68 million difference is something we're sort of counting on in our revenue collection. I'll come back to that later.
- There's a few reasons for that. As we're thinking "Why exactly did we collect so much money, and what does that mean for our expectations for the future?" We're still dealing with a few challenges.
- One of the major challenges is that we have a little bit more data than we had before the program started, but it's not much more. In the future, I'll be able to get information from the City of Portland, who collects the tax for us, and I'll have a good sense of who's paying the tax and if there are specific individuals who are paying a lot of it.
- The other piece is that eventually, we'll get data from the State of Oregon that will tell us exactly what type of income people are reporting.
- It makes a big difference for us how much of this tax is coming from capital gains, how much is coming from rental income, how much of it is coming from just normal wage income - because we know that about 100 tax returns are going to account for about 17% of our revenue. So we're going to be really focused on our very high-earning individuals, we're going to track them over time, and we're also going to be able to know where they get their income from. We'll include this data in future forecasts and continue to refine the forecast as we go forward.

Higher Income Earners FY22 Tax Collection

- That long blue line in the middle of the graph above shows the year over year change in capital gains at the state level. And what it shows is that between tax year '20 and tax year '21 (and most of our tax collections for 2022 were from tax year 2021) capital gains at the state level almost doubled. So that means that a significant chunk of our revenue source had a huge year over year increase.

- The thing that we need to be aware of is that we did a lot better than we expected, but it appears to be driven by something that we don't expect to continue.
- In calendar year 2022, the stock market did significantly worse than it did in calendar year 2021. So if we're thinking about the economic activity that creates those capital gains, we don't expect that to be there at the same level.
- We also know that capital gains come in a lumpy way. If you have a long period of economic expansion, people are building those gains up over time, and if they start feeling like the economy is getting a little bit sketchy, and if they're worried about the stock market or asset prices going down, you'll get a big race to the exit. People will cash out those assets, take the profit on it, and then they'll pay tax. Which is why the expectation of our collections has the shape that it does.
- So for 2023, we expect our revenues to go down pretty significantly. The forecast is for $152.9 million. But we're still at the point where we're feeling our way through, and as we get more data from the state and more data from our tax collector, we'll be able to do more sophisticated modeling.



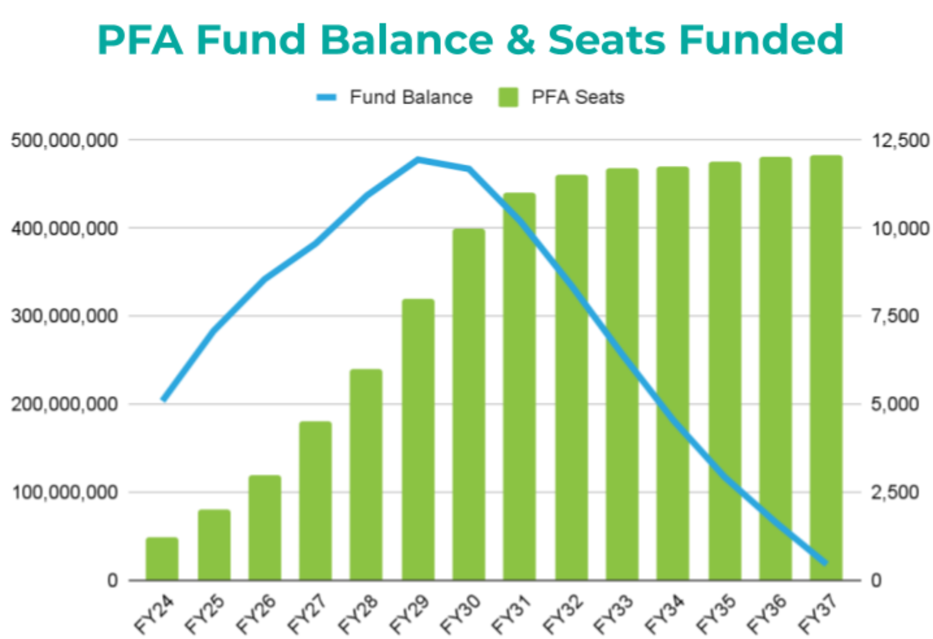
- This is an updated version of a slide we showed last year. This is where we're thinking about putting all those pieces together. Taking that revenue expectation of how volatile it's going to be, and then taking the expectations on the expense side that Brooke and her team have put together, and then the question is: how do we match these revenues and expenditures over time? And how do we think of the entire implementation of this program and plan for it?

Molly Day, she/her

- I appreciate this approach - to ease out those shortfalls and overages. Just as we're zeroing out our biennium budget to zero here in state government - every time I just think, "There's got to be a better way to do this!" So I'm glad we have that flexibility here.

Jeff Renfro, he/him, County Economist

- When Brooke and I talk about this slide, we call this the "two triangles graph." You can look at the space on the left side of the graph where our revenues are higher than our expenses. During that period we're generating surplus. Then on the right side of the graph, we have a period where our expenses are higher than our revenues, so there's a deficit.
- Essentially, the idea behind the implementation is that we take the surplus we're generating in the first part of the program, and we spend that in the later stages of implementation as we get to full universality, until the revenues and the expenditures sort of even out again.
- We're calling this "revenue smoothing." We're thinking about using all of the revenue we collect over the entire implementation. We're not thinking of matching any one year - we're thinking about the whole cycle here.



- This graph shows you what that looks like in a different way. The blue line is the PFA fund balance. "Fund balance" just means the amount of money we have in the fund at the end of the year.
- In years where we have a surplus, that fund balance is growing, and we have more and more money as we go, and the blue line is going up. But then the green bars are the number of PFA seats we expect to offer in each one of those years, so you see as that goes up and it gets closer to full universality, our fund balance starts to go down as the program switches into deficit, and we spend down all of that surplus that we saved in the first few years of the program.
- As we're thinking about the revenue forecast, in the first few years we're really confident that we'll have enough revenue to provide the level of service that we're planning on in those years. The bigger question is, are we generating enough of a surplus? Are we saving enough to set aside to help us in the out years of the program when we expect to have a deficit?
- What this graph demonstrates is that even when we updated our revenue estimates after the first year of collections, and then also incorporated some higher inflation in the first few years

and bumped up some of our expense assumptions, we're still on track to fully fund the program all the way through the full implementation. We're on target to meet our savings goals.

- What we're watching closely are things like a recession in the future - that would affect our revenues. Having a recession in the earlier part of the program might present a challenge. I think because of income inequality, we might actually be a little bit shielded from that, because the people paying this tax are a little bit more shielded from that kind of decline.
- The end takeaway from all this is that we remain on track to fully fund the program through implementation, but there's a lot of unknown here, especially around the revenue, and we're constantly calibrating as we go.
- Questions?

Molly Day, she/her

- There was some talk early on about wealthy people being unhappy with funding pre-K in Multnomah County, and they're going to move away. Are we seeing any signs of that?

Jeff Renfro, he/him, County Economist

- People have moved. I think it's been limited. I'm part of a group with the state - it's mostly CPAs and tax lawyers and there are a few of us economists who ask them questions. And I definitely heard some stories about people who wrote their first PFA check and then left the county.
- But the economic data suggests that people's location decisions are informed by taxes, but it's only really the deciding factor when people are already making some sort of life change. If people are starting a family, or getting ready to retire, the taxes can become important. But it's pretty unusual for people to say, "I'm unhappy about this tax. I'm moving."
- We were concerned about it given the small geography that this is taking place in. So we're going to track this over time and see if it's an issue. But another thing that I'm hearing is that because the interest rates are so high, even people who are unhappy about paying the tax don't want to trade their 3% fixed rate interest for 6% at a different house outside the county. So we might be benefitting from that.
- I think at this point the bigger unknown is the impact of people working from home. There's some percentage of people who we expected to pay us who live outside of Multnomah County but came into downtown to work, and we expected them to be subject to the tax, but if people work remotely exclusively and they're living in Washington County, and they're working from their home in Washington County, they don't have to pay the tax anymore. I don't expect that to be a systemic risk, but because there's so much uncertainty about that, it's something that we're going to try and figure out and track over time.

Lavert Robertson, he/him

- I saw that the projections went to something like 2039. Why did we choose that year to end the projection? Was it because of the reserves being spent down to zero that year? Because I'm wondering - maybe two or three years past that year, where are we going to be?

Jeff Renfro, he/him, County Economist

- If you look at that "two triangles" graph, we go a little bit further out there, and essentially we expect the expenses and the revenues to reconverge. Some of our capital expenses go down to a more sustainable level. So we cut it off there to show that we expect to build this thing out and then for it to come back down. Going forward we expect our fund balance to continue on at this low level that's going to bounce around a little bit, but what we wanted to demonstrate is that there's going to be this big run-up, because we have to collect most of that revenue smoothing money in just the first few years of the program, and then we're going to spend it down over time.

- Also, 2040 is a long way away. We're making assumptions and thinking about how the dynamics work, but honestly, I don't have any special insight into what the world is going to be like in 2040. Other stuff is going to happen, and we'll figure it out as we get closer.

Brooke Chilton Timmons, she/her, Management Analyst, PEL

- We have some unsung heroes at the County, and people who are working really hard behind the scenes and are champions of our work, and Jeff is one of those people. I appreciate him so much. He does a lot for us. And I don't get to say that very often to important people, so I want to tell you all how much I appreciate him. Thank you, Jeff.

FY24 Priorities

1. **Maintain a Clear Focus on Racial Equity:** Diverse team, equity analyses, sharing data, co-creation, redefining preschool quality, building on successes
2. **Plan for current and long-term needs of the initiative**
3. **Strengthen Pilot Sites & Recruit New Providers:** Focus on inclusion and core practices

Leslee Barnes, she/her, Division Director, PEL

- I'm going to talk about FY24 Priorities. The first is maintaining our clear focus on racial equity. I'll share some specific ways we want to put that commitment into action.
    - We need to hire, support, and retain a diverse team of people committed to early childhood education and racial justice. We've done a good job even during this climate of workforce challenges, to hire a diverse team of experts that reflects the community.
    - The next step is embedding racial equity analysis into our work, and using data to improve our services and supports. We'll also need to share that data and collaborate, and be open to that feedback.
    - Whenever we can, PEL is cocreating with our partners on policy, strategy, and future planning. We're investing in culturally specific and responsive organizational strategies

and programs. Building authentic partnerships and making space for partners to share their expertise will mean a stronger system overall.
    - The next is defining preschool quality, and meeting providers where they're at. Our partnership with Boston University is one important piece of this work, as is PFA's commitment to partner with preschool programs and support provider growth. There are providers at many different places in their journey, and we want to work alongside them.
    - Staying focused on racial equity also means building on our successes. We need to continue to focus on serving families from PFA priority populations. We will do this while creating a mixed-delivery system that offers families many different options to meet their needs, and invest in culturally and linguistically diverse small businesses.
- The second major priority is our planning for both current and long-term needs for PFA. We are in the early years of building a system that we hope will be in place in our community for generations. Our planning includes what we'll need for the next year, and how we will maintain consistent services over the long term with the volatile revenue source. We'll do this through robust fiscal stability strategies, including a reserve fund, contingency fund, and revenue smoothing dollars, which Jeff highlighted earlier.
- Our third priority is to strengthen our Pilot Sites, and also to recruit new providers. We need to simultaneously increase the number of PFA slots in the community and continue to partner with existing providers to strengthen and improve their programs. One of the major areas of growth this year and in the future will be inclusion. We have a lot of work to do to create more inclusive environments, so that children with disabilities can thrive, and to build experienced and competent educators to teach children with a wide range of needs.

FY24 Priorities

Continued

4. **Enhance and refine foundational PFA structures and processes:** Coaching, ECMH, PFA Facilities Fund, application system, cross-agency collaboration and supports for providers
5. **Create new opportunities for community input:** Focus on family and provider leadership and feedback

- It will take most of FY23 for all the key parts of PFA infrastructure to be in place, including building an early childhood mental health team, new workforce development investments, and

the facilities fund.
- One of the primary focuses in FY24 will be to use PEL's additional staff capacity to strengthen and refine the infrastructure. Strategies will include enhancing collaboration across agencies, including those focused on inclusion, and strengthening data collection, communication, and evaluation.
- Our final major priority for FY24 is to create new opportunities for community input. In order to improve the foundational structures of PFA, PEL will be working closely with partners to establish new opportunities for family and provider leadership and input. This will help to ensure that decisions are made by people closest to the work, and will also help to build trust in the community.

Brooke Chilton Timmons, she/her, Management Analyst, PEL
- We want to open this up for discussion. We want to hear from you early on in the stage of budget planning for next year - thinking about what work we're doing in the next year, and how we're talking about it too, so we can have a compelling message about the work that's happening, because there are so many things happening. We'd love to hear from you all if you have any questions about the process, or the investments for next year. Is there anything you want us to spend more time on in our April meeting when it comes to the budget or anything connected to it?

Ana Muñoz, she/her
- In terms of supporting existing programs, I've been hearing a lot of worry around the workforce, in terms of the new family law that's going into effect, and how there's a lot of sites that are having a hard time hiring. There are options in terms of salary, in terms of schedule, in terms of specific needs and wants that employees are asking employers, and a lot of small child care businesses are not able to sustain or offer what they're being asked for, and therefore they have to pass on hiring staff. That's a big challenge out there right now.

Leslee Barnes, she/her, Division Director, PEL
- Yes, that's something we hear all the time. Another layer to this is how do our diverse and ethnic communities recruit staff also, in a place where they may not have a lot of choices of folks who are in their own communities, so we're thinking about that too.
- How do we incorporate apprenticeships? How do we reach down to schools, high schools, summer work opportunities, CTE programs - there are a lot of opportunities that will help make the future easier.. And, a lot of those strategies don't solve the crisis today.
- We need to start with the pay and the benefits - make sure we get that right, so we can eliminate those as barriers. Then there are things to learn about the kinds of settings people want to work in. Is there a stigma around working in an independent child care center or family child care provider, instead of a school district? How do we get at what some of those stigmas might be around working in early learning? Early education has a bad reputation of not paying well. We need the new message to be, "Hey, this is a viable career path for you."
- We also know that we have a lot of small providers who are expanding, who have not had to hire, don't know how to supervise necessarily, don't know how to support, guide, and mentor their staff - so there's a skillset that needs to be built as well. It's not just the pay, sometimes it's how you give feedback, how you support staff in their practices. We're looking holistically at many strategies to address hiring challenges.

Lavert Robertson, he/him

- I understand that all of this is being paid for locally by the taxes, but I'm just wondering, are there any current bills that you all are keeping your eye on, or are willing to support during this legislative session that directly relate to the work we're doing? Are there any current bills that you're keeping your eye on through the legislative session that you would hope folks would support locally?

Leslee Barnes, she/her, Division Director, PEL

- Yes. There are state investments, programs, and legislation that we are watching. Early childhood mental health supports, workforce efforts, higher ed, and other publicly funded preschool across the state, and implementing that well. We need to be able to connect to all those other opportunities. We are not going to get to universal with just Preschool for All Multnomah County. All those investments lead us to that - Preschool Promise investments, OPK, all those things lead us to universal. If we don't have those, and all those other system supports, we won't get there. So we do pay attention to those and track those.

Brooke Chilton Timmons, she/her, Management Analyst, PEL

- It looks like the Governor is really interested in potentially raising early childhood wages. We are a tiny bit of the system right now - we will grow and grow- but if we can build up a system where wages overall are being increased, that would be a huge help in terms of recruitment and ongoing retention of staff overall in the early childhood profession.

Leslee Barnes, she/her, Division Director, PEL

- There's an important bill about landlords not being able to discriminate against providers who are operating in rental homes.

Andrea Paluso, she/her, Child Care for Every Family Network

- Leslee, to your point, a lot of what's happening this year is important, and it's about building back-end structures and supports. What it's missing is the deep investment in additional resources. And I think we need to figure out strategies to do that at the state level, and we also need to figure out strategies to do that at the federal level.
- This is one of those systems where parents can't afford to pay what it costs to have a really high-quality preschool or child care arrangement, and so often they either can't afford what they need, or providers are providing services through their kind of underpaid, exploited labor to subsidize a system that isn't getting public investment in the way that it should.
- And I don't think the answer to that is that we have a workforce of people who are underpaid or don't have access to the things that they need, it's that we need the state or federal government to come in and subsidize what it costs to get high-quality care.
- So if folks are able to check these bills in the Oregon state legislature and do what we can here - the subsidized programs that are happening at the local level - we should do that. And also, if you ever have opportunity to be in front of members of our federal delegation, just reiterate that this county cannot do something of this scale, or beyond, by itself. It's going to need state funds, it's going to need federal funds to be able to do that. And we're lucky, actually, to be in a county that's doing as much as it is. Around the rest of the country, the situation is a lot worse. So they need to step it up. This is a problem we need to solve.

- And the last thing I'll say is some of the federal money that we did get during Covid is running out this year. So in addition to the forecast that you all presented, I also wonder what the impact of that might be. The stabilization dollars that came in through the state to support providers - in inadequate ways, but in some ways - during Covid, expire this September. And the monies that came from the federal government to states to expand enrollment and subsidize enrollment of certain families in child care programs is expiring next September. And there's currently no real plan at the federal level to get those funds expanded, reinvested.

Lavert Robertson, he/him, All Hands Raised

- I have one other wondering. I'm a big fan of Preschool for All Multnomah County, but I've entered into several conversations with folks who are getting things mixed up - thinking that PFA is the same as Preschool Promise, and they're saying things - and I'm correcting them - I'm like, "No, we're in great shape with what we're doing! We've filled all the slots that we opened up and we have child care providers on board," but they're getting it mixed up. They're saying, "We're paying all this money in taxes for this initiative, and there's so many open slots." Which isn't the case, but how do we - and it might not even be on us - but how do we differentiate PFA from Preschool Promise and get people here locally to understand that we are actually ahead of the curve and doing really well with this initiative?

Leslee Barnes, she/her, Division Director, PEL

- I'm in those spaces all the time! One of the things we're thinking about, is to generate some more outward facing communications about what we're doing, what is going on. If it's a spot, commercial, whatever it is, I think we just need to generate and get that out there all the time. And not necessarily have to talk about what Preschool Promise is or isn't doing, but talk about who we are and what we're doing so people can see that we are making the progress that we set out to make - in our first few months! Mind you - kids started on carpets just last fall!
- I think the more we talk about the system we're building - that's one of the things that people have asked - is it on par with the amount it costs for someone in K-12, and dividing the tax revenues by the number of slots we have now, and getting this very large number, which is not accurate. Look at our infrastructure plan, all the things that we have to build. It's not the same. And so we're going to really take some time with our communications person Ashley and really get some more opportunities for that good press, and things on our website, one-pagers, stuff we can give you all, to have talking points - I think really that's what's going to separate us.

Molly Day, she/her, Early Learning Multnomah

- When the last newsletter went out for PFA and it said that there were open slots, I had a big donor call me and say, "I thought they were full. What's going on?" And I was like, "No, this is just like kindergarten classrooms - people move, spots open up…" I think just normalizing this. But yes, it's weird how people think preschool works - just, not at all in touch with reality. So I do think we have education to do.

Leslee Barnes, she/her, Division Director, PEL

- We really do. We're at 92% enrollment, which is really good. And there's always going to be people that move or change their mind - that's just a natural piece of a preschool system.

Jaime Peterson, she/her

- The piece that Children's Institute put out last week is such a good example of what we need more of. I blasted it to anyone who has any issues with PFA. I was like, "I can't explain this well, but look: the basement got renovated so she can have more kids! She's getting the coaching she needs to get the license!" I don't think people understand we're not just putting kids in classrooms. We're building a pipeline. So I think that piece is a really great example. Bravo - good partnership with Children's Institute. I think more of those pieces for the lay public will be really helpful. I just want people to know about it!

Brooke Chilton Timmons, she/her, Management Analyst, PEL

- One easy thing we can do is to say "Multnomah County's Preschool for All" more often as the title. Because as soon as we say "Preschool for All," then that's when the Preschool Promise thing happens. That's one thing that as a team we're going to start doing more often when we're talking publicly, to help distinguish between the two programs.

Andrea Paluso, she/her, Child Care for Every Family Network

- For the next meeting - or in the future - are there updates on the facilities, or the infrastructure, the spending out beyond slots that we could have? And also any problems - any issues that you're experiencing? Because I've been part of another process where the administering agency has run into problems, and having the public-facing advisory body know about them and be prepared to speak to them if they arise is a pretty important thing, and useful. So if there's anything you're anticipating that are real challenges to scale on the timeline that we thought we were going to, or any anticipated issues coming up over the next little while would be really good to know.

Brooke Chilton Timmons, she/her, Management Analyst, PEL

- We have a few of those we want to share at the end of the meeting tonight, so I appreciate that. And I hope you all know too, that if there's things that you ever have questions about, you don't ever have to wait until these meetings. Know that you can reach out! But absolutely, let's keep coming back to that.

Janice Cole, she/her, Senior Research and Evaluation Analyst, PEL

- I'm going to provide some updates and build on what we connected about last time I was here, in May. And then I want to provide some highlights of what we've been working on in data over the last six months. And then some findings, a couple charts, I'll share what my priorities are for the coming year, and then briefly check in about that list and see if there are big gaps that you want to point me towards as we're making our plans for what's next.

Where did we leave off?

Evaluation Approach Priorities from the Advisory Committee

- Close the feedback loop (especially with families)
- Build trust and encourage conversations
- Include parent voice in the evaluation
- Make sure evaluation activities are not taking away from learning time
- Ensure transparency

Initial Questions of Interest:

- What are the benefits and perceived values of coaching? How is it going?
- What are we learning about implementation? Are things happening as intended?
- What does the growth of providers look like? Do they reflect our priority populations?
- What are some other benchmarks of wellness? Things to measure besides educational outcomes?
- How are families whose children have special needs being served in PFA?

- I had the pleasure of chatting with the Advisory Committee in May of 2022. The presentation was focused on sharing a bit about me and my evaluative approach, and then hearing from you all two things. First, what evaluation approaches and values you center. Second, I asked you what your initial questions of interest were related to evaluation.
- I wanted to share some highlights of what I've been up to the last six months. The good news is that a lot of what I've been up to has either set the stage for, or begun to explore, the areas of interest in the slide above.

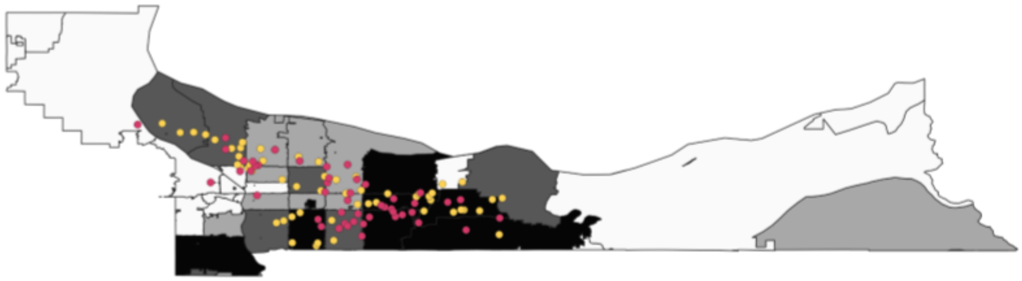
Evaluation Highlights

May 2022 - January 2023

- Application & Enrollment Process Retrospectives
- Coaching Evaluation tool design and planning
- Kicked off research partnership with Boston University's CEED
- Provider Feedback Sessions
- Application, Offer, & Enrollment data analysis
- Decline Project (in progress)

- Because this is the first year of implementation, I've been primarily focused on gathering formative feedback and doing rapid cycles of inquiry. What did we intend to do? Did we do that? Where can we do better next time?
- Along the way, relationships and trust building continue to be a high priority. Relationships and trust have been at the core of how we've approached each of these activities. That means being flexible about approaches, taking things slower to let things "breathe" a bit, and being nimble enough with evaluation that it can get used in real time. It also means closing that feedback loop: sharing findings back out, asking the question "did we get it right?"
- Another really important piece to these activities has been establishing shared definitions. So, for example, we talk about equity in early childhood education - what does that mean to providers? How do they see that showing up in their classrooms? What does high quality mean? How do folks define coaching? What do they see as valuable?
- In addition to some of these main activities, there's also been a big push to establish data collection systems and processes that will hopefully allow us to start measuring some of our effectiveness and impact. In short, there's been lots and lots of learning and growing, and there's still so much more to do!
- So now I'm going to share some data and key learnings from the highlights I just mentioned. I am focusing on data that touches the priorities that you identified back in May, at least in some part.

Young Children in Multnomah County



Legend

- Preschool For All 2022-23 Pilot Sites
- 2022 Head Start Sites from U.S. Department of Health & Human Services

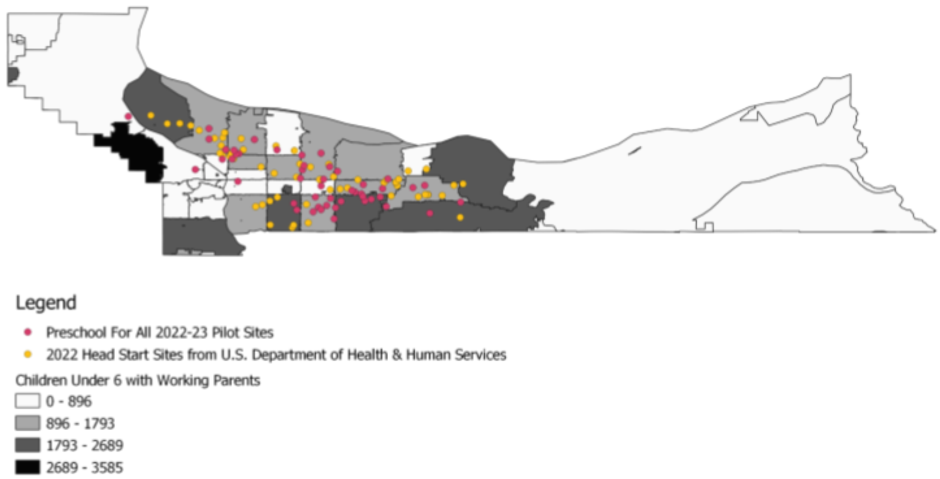
Children Under 6

- 0 - 896
- 896 - 1793
- 1793 - 2689
- 2689 - 3585

Data Source: U.S. Census Bureau. (2022). *2020 American Community Survey 5-year estimates, generated by the Boston University Center of Ecology of Early Development,* retrieved via U.S. Census Bureau API.

- First, I want to share some learnings from our research partnership with the Center on the Ecology of Early Development at Boston University. One of the activities in Year One of our two year research partnership is for the CEED team to do some archival research to better understand the early childhood education landscape within Multnomah County. We asked them to take a look at census demographics, overlaid with publicly funded preschool programs. Right now, these maps have PFA and Head Start, but we are currently working to add in others like Preschool Promise. With these maps, we wanted to start to approximate the need for early education based on different demographic indicators.
- This first map is of young children living in Multnomah County. The darker the gray, the more children under six live there. You can also see PFA pilot sites (pink dots) and Head start sites (yellow dots).
- As I look at this map, I'm encouraged to see that east of 205, where many of our PFA sites are located, is also where we see more young children residing. I can also see that while there are quite a few Head Start locations in North Portland - especially towards St. Johns - that might be an area for us to consider intentional outreach to PFA providers to ensure we're meeting the need.

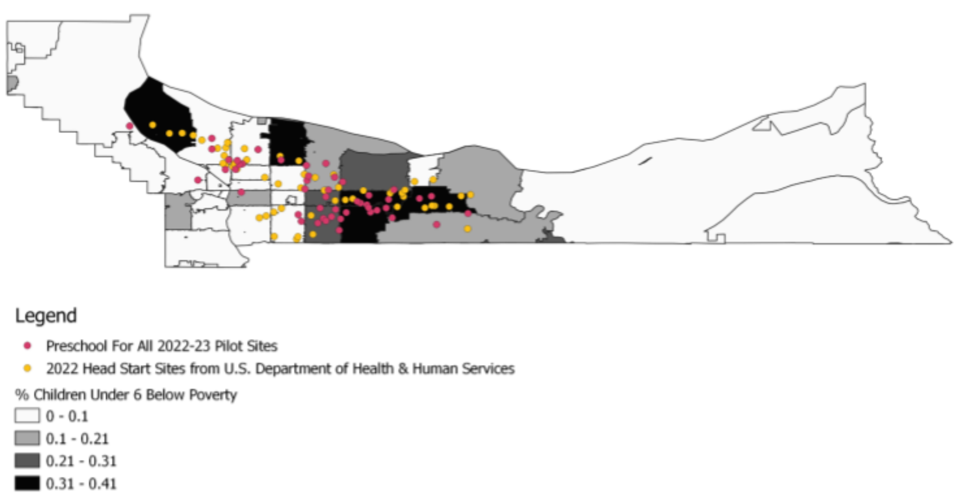
Estimating Child Care Demand



Data Source: U.S. Census Bureau. (2022). *2020 American Community Survey 5-year estimates, generated by the Boston University Center of Ecology of Early Development,* retrieved via U.S. Census Bureau API.

- Next, the team looked into estimating child care demand based on children under 6 with working parents. Because this is census data, we are a little bit limited in our ability to zero in exactly on 3- and 4-year-olds. There are some ways to estimate counts at that level that we are looking into. But for now, we can see a similar color pattern as on the previous slide. Interestingly, there is the area bordering Washington County that I really want to look into more. It shows up a couple times as an area of higher need potentially, based on young children with working parents, as well as some of the primary language mapping the team did.

Young Children Living Below Poverty

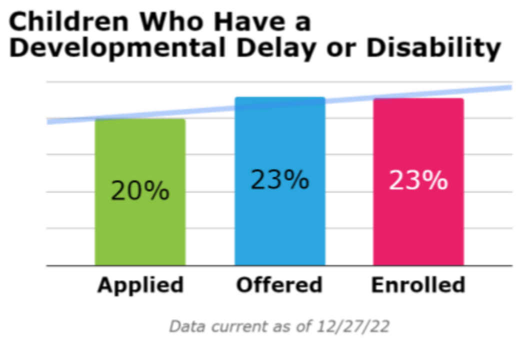


Data Source: U.S. Census Bureau. (2022). *2020 American Community Survey 5-year estimates, generated by the Boston University Center of Ecology of Early Development,* retrieved via U.S. Census Bureau API.

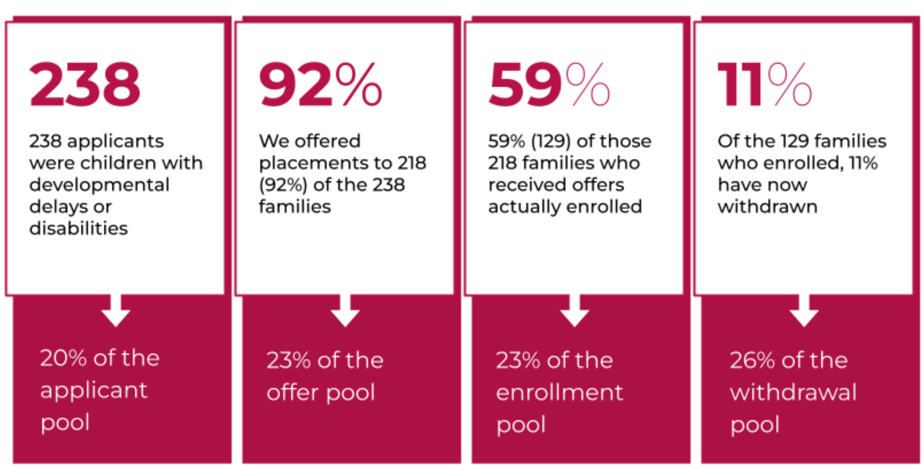
- Here, we are looking at the percentage of children under six whose families are experiencing poverty. Again, you can see North Portland showing up as an area of need that has fewer PFA sites compared to coverage in East County.
- Our research partnership with BU is continuing to explore this data, and we're currently working through better ways to visualize, as well as better proxies we might use to demonstrate need and do population estimates.

- Next, I want to highlight some of the evaluation findings we've gathered related to coaching. We've had some fabulous co-creation of evaluation tools with Child Care Resource and Referral to better understand pathways and pilot coaching experiences. Those are nearly ready to start implementing. In the meantime, we held a round of provider feedback sessions focused on coaching for pilot sites back in November and December. We asked pilot sites to tell us in their words, what the benefit of coaching is, and to share with us how they've utilized their instructional coach so far and provide feedback on what is working and where we can improve.
- The main benefit that providers identified to working with a coach is the opportunity to work with an unbiased, outside thought partner. They liked that their coaches have been able to provide resources and offer feedback to them, and shared that coaches have made their staff feel heard and validated.
- The coaching relationship is very important to our providers: they want their coaches to be supportive, non-judgmental, and to follow the lead of the teachers in goal setting and pacing.
- We also heard that our pilot sites have had different experiences of coaching so far: some have had absolutely incredible experiences with their coach. Others were in the very early stages of working with their coach and had questions around what to expect from coaching and a desire for more consistency from their coach.
- This was all really helpful feedback to hear to support implementation, and also helped shape how we designed the evaluation tools for coaching and what we are beginning to measure.

Data Spotlight: *What are application and enrollment rates looking like for children with disabilities?*



- A big focus of the last few months for me has been studying our application, placement offer, and enrollment data. During the last Advisory Committee meeting, you saw some preliminary findings of that data for our priority populations. Tonight, I want to focus in on one population in particular: children who have developmental delays or disabilities. This population is one that we've heard many of our partners asking about - not just the Advisory Committee, but also from our family navigators and others. As I am going through this data, it's important to keep in mind that this data is looking at just one aspect, and that many of the children represented in these charts have intersectional identities and complex experiences that are also an important part of this story.
- This graph probably looks familiar to you. This is looking at the percentage of children with developmental delays and disabilities who applied to Preschool for All (20%), and then the percentage we offered to, and who ultimately enrolled (23%). It's encouraging to see that we offered placements to - and a greater proportion enrolled - compared to our applicant pool. I wanted to go a little bit deeper though, to see what else we can learn here.

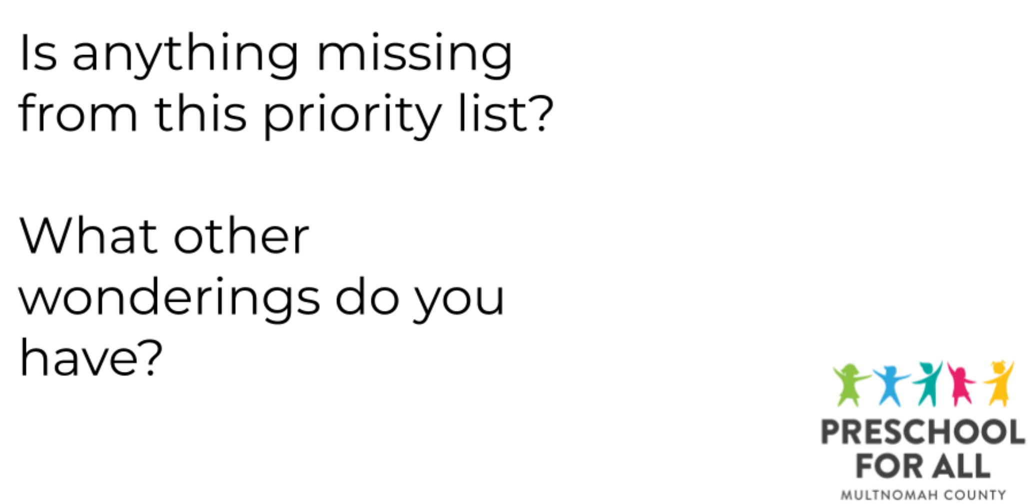


- This is another way to look at that information. The dark pink boxes are what I just shared. you know that 20% of the applicant pool were children with developmental delays or disabilities. That’s 238 applicants. We offered placements to 218 (or 92%) of those 238 families. Overall, that was 23% of the offer pool. 59% of the 218 families who received offers actually enrolled (129 children). Again, that’s 23% of the enrollment pool, like you saw on the previous slide.
- I’ll pause there and highlight a couple of things. We actually made placement offers to nearly all of the families who applied whose children have developmental delays and disabilities. However, just over half of those who received offers actually enrolled. One of the reasons I’m excited about the decline project we are finishing up was that it was a chance for us to hear more from families about why they didn’t end up enrolling. We are analyzing that information currently. So far, I can’t say that there is just one reason I can point to, but we are hoping to have that analysis done in the next month and can share our findings then.
- We do, however, know the reason for withdrawal after a child has already been enrolled. As of the end of December, 11% of the 129 families had withdrawn. 26% of the overall withdrawal pool were children with developmental delays and disabilities. The main reason for these withdrawals has been due to providers being unable to contact the family, or the child not attending. Something I find really interesting is that of all the children who withdrew due to non-attendance, half were children with developmental delays and disabilities.
- So what does this tell us? First, we need more information. For example, knowing decline reasoning, and also hearing more about the experience of families who withdraw. Second, there might be more opportunity to support these families in enrollment, as well as in the transition months of starting in a PFA classroom. Third, I think about this data coupled with other information we have learned this fall, such as staffing and workforce challenges that might be impacting these numbers as well.
- I am really curious to continue tracking retention of our priority populations. I am also really interested in seeing how these numbers shift next year, knowing the adjustments we’ve made along the way based on the data and feedback we’ve received so far.
- So, that is just a bit of what we’ve been learning and seeing over the last several months. There is so much more to explore, and I think one of the biggest challenges right now is simply knowing where to lean in and prioritize when every question feels important, urgent, and compelling.

Priorities for the Coming Year

- **Context:** Connecting to other data systems for points of comparison/reference
- **Coaching:** Implementing coaching evaluation plans
- **Quality:** Implementing ACSES observations and assessments with Boston University’s Center on the Ecology of Early Development (CEED)
- **Planning:** Evaluation planning and design, selection of long(er)-term measures
- **Co-creation:** Co-creating evaluation strategies with providers and families

- That said, here are my priorities for the coming year:
  - Connecting our data to other data systems in the state so that we have additional context and points of comparison/reference. This also builds data relationships with other early education entities.
  - Coaching: Implementing the coaching evaluation plan
  - Quality: implementing ACSES observations and family/teacher surveys, and gathering satisfaction feedback.
  - Planning: Continuing with evaluation planning and design, and starting to work on the selection of longer-term measures. A lot of the other bullets you see listed here will inform this, and I am also really grateful that this is a component of our research partnership with Boston University, so I'll have lots of thought partners in this.
  - Co-creation: exploring, and hopefully establishing, some leadership groups of families and providers to guide evaluation strategy and activities. Want this to be really intentional, not tokenizing.



- This last slide, which I think we're probably short on time for, is mostly just a thank you. But if there are priorities that you do feel are missing from this list, or you have other wonderings, you are always welcome to reach out and connect with me.

Keinya Kohlbecker, Harmony Montessori

- I have a clarifying question about the evaluations that came from the coaches for this presentation. Were the providers the ones that provided the feedback to the coaches to bring information - data and such for you to present tonight - or was that a combination of the actual workforce?

Janice Cole, she/her, Senior Research and Evaluation Analyst, PEL

- The qualitative slide that I shared around coaching was our direct data with the Pilot Site providers, so they shared the feedback directly to us. And so it was really more on kind of, systematically, how are you viewing coaching? I think where the coaching tools are going to come in handy is that will be providers and teachers sharing feedback directly to their coach and to the CCR&R in addition to us, so it's going to serve dual purposes. One: for kind of overall evaluation, and two: for having bi-directional feedback loops between coaches and providers.

Keinya Kohlbecker

- So that priority for the coming year, that feedback and the evaluations from the coaches, that's where you will start to have more opportunities for those teachers to be able to give their voice, along with the providers?

Janice Cole, she/her, Senior Research and Evaluation Analyst, PEL

- Yes, exactly. Those evaluations will go to every single coachee, not just providers/owners/ directors, which is mostly who we had for our feedback sessions. So that will go to every coachee, in both the Pathways and the Pilot Site programs.

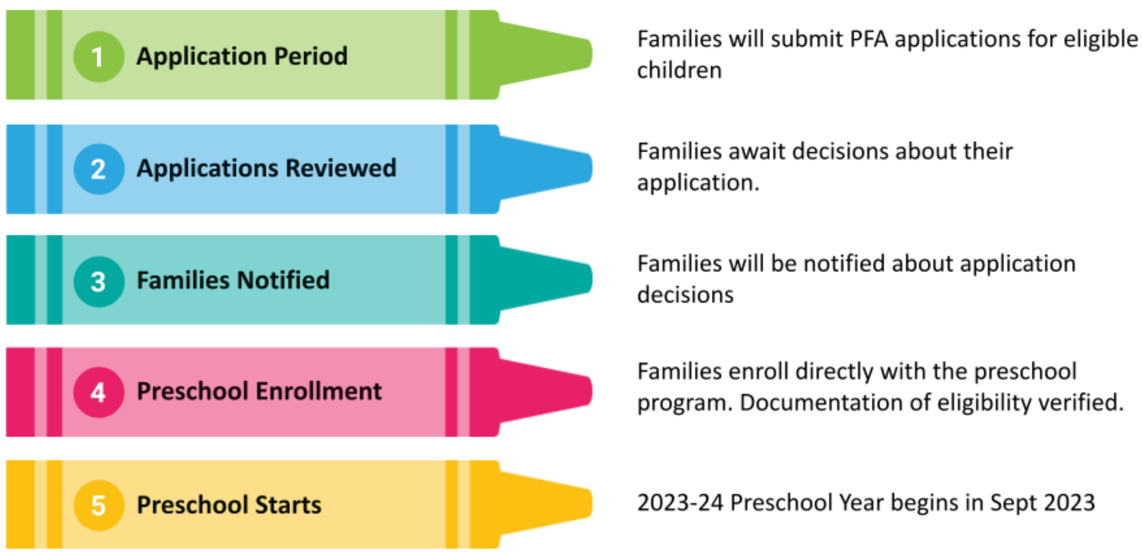
Kimberly Moua, Co-Chair of the Preschool for All Advisory Committee

- I previously worked for the ELD, and what we noticed is that when we had an outside party come in and do evaluation and collect qualitative data, what we got from our providers was different from when the actual ELD staff interviewed them. Because PFA is the funder, it's going to make the providers feel like they would have to answer a certain way. I'm wondering if that has been thought about, and if that's going to be a part of the process at all.

Janice Cole, she/her, Senior Research and Evaluation Analyst, PEL

- Yes, absolutely! It's such a great point, and I 100% agree. It's one of the things that make me really happy that we have our research partnership with Boston University, because they function as the external evaluator for PFA.
- For now, that's just a two-year partnership, but our hope is to continue to expand that. Some of their research will go to our providers to provide feedback and experiences about PFA, and I don't even have access to that data except for what they summarize to me. So that will go to providers, it will go to families - both PFA families and non-PFA families who are at those schools.
- And then they also have a facilitated community of practice that will be a small group of coaches and providers and their own facilitator to work through some topics amongst themselves, too.
- But we're definitely trying to balance that. For example, gathering feedback from coaches means one thing when CCR&R asks it, and another when PEL asks it. One of the things we've been working on is when we are sending out a survey or a tool, we include a checkbox that says, "I want to talk to someone at the Preschool & Early Learning Division," or "I want to talk to a coaching manager," or "I don't want to talk to anybody." We're trying to give people options, so they're able to connect in a way that is going to work for them so we're not missing really valuable feedback, because there are power dynamics and imbalance in this work. And so I think it's a really good point - and I don't think we're perfectly there, but we're trying to set up some things to facilitate that.

Family Applications



Brooke Chilton Timmons, she/her, Management Analyst, PEL

- I'm going to walk you through our planning for family applications, which is coming up so soon!
- We're going to be releasing the application in just a few months.
- Similar to last year, we will use an online process. What's exciting about this year though, is we're using our long-term application system. As you all may remember, last year we were using what's called a "minimum viable product," that was built by our county IT team. And it did what we needed it to do. It had no extra functionality and was not built to be a long-term system.
- Meanwhile, we purchased - through a procurement process - a system called BridgeCare. So, we'll be switching to BridgeCare this spring, and a lot of the functionality, in terms of how the application flows, will be similar to last year.
- Our goal in the application process is to really make it as simple as possible for families, and to reduce barriers wherever we can. We don't have any documents that are required as part of our process. We do ask for families' income, but we don't ask for additional documentation of that income - we just ask them to sign an attestation at the end. We only collect the information we need.
- Even though we were working with a simple system that just did what it needed to, we heard great feedback from families in Year 1. 92% of families who completed the survey - and most families completed the survey afterward - said that they were satisfied or highly satisfied with the application process.
- But with that, we also heard helpful feedback. We're excited that many of the things that we heard from families about process improvements, BridgeCare will help us do this year.
- I wanted to highlight a few of those things.
    - One is that there will be a searchable map again, but it will be easier to use. Families will be able to search on the map, and then also save providers that they're interested in
    - There will be more information about every provider through the system. A page for each provider, where they'll be able to share information about their program, their staff, and then it will link directly to the provider's website as well.

    - And on this year’s application, instead of choosing up to three preschool options, families will be able to choose up to six preschool options.
- We’re excited about these changes, and about having the BridgeCare system in place. Our application and enrollment team are working so hard because they’re still working within the MVP for existing families and providers, and then having to plan for this second system, so it’s a lot for them right now.
- We do anticipate opening the family application this year in early May, which is a little bit later than we had wanted to, and, when you have a brand new technology system, I think delays are to be expected. So it’s still within the overall window we wanted. We are planning for the application to be open for 4-5 weeks.
- This year there will be a clear closing date, so families can take that full month to research programs, go to an open house, attend a virtual meeting, speak to a provider, in order to make choices that are going to be the best fit for their families. And that way we hope we’ll have fewer declines, and those families will really make the choices that are going to be the best fit.
- We will close the application for a period of time to send out the first group of placement offers and we anticipate that most slots will be filled during that time. BridgeCare will allow us to open the system back up and essentially have a rolling set of applications for any remaining slots.
- I’m going to cut the conversation short because of the time, and send out the rest of my updates via email.
- But we did have one update that we want to make sure the group knows. And that’s an exciting one for us overall as a team - but a little bit sad for this group. We are welcoming Kimberly to the Preschool & Early Learning Division as a staff member! Kimberly is our new Policy & Partnerships Senior Manager. So she’s going to be really leading all of our work in terms of working directly with providers, our workforce development efforts - she’s going to be leading a growing team.
- One of our other updates is that we’re going to be going to the Board next week to ask for additional staff, because one of the issues is capacity right now, and we are feeling very stretched to do all of the things that need to happen. But Kimberly is going to be a huge part of building up that team, and we are so thrilled for her to step into that role!
- It does mean that we will need to ask for a Co-Chair in this group. So I will include that in my email.
- Thank you all so much.

Leslee Barnes, she/her, Division Director, PEL

- Take care of yourselves! And I appreciate you spending your evening with us. We couldn’t do this work well without you. So thanks again, and we’ll see you soon.