



Partnership to Advance School Success

Implementation Guide

PASS: a business-education partnership program developed by the Council for Educational Change and the Florida Council of 100, in partnership with the Florida Department of Education.



"It's all about helping kids have the same educational opportunities, regardless of where they live in the county."

*Brian Butler,
President & CEO,
Vistra
business partner quote*

The PASS Model... Overview

The PASS model for principal leadership was developed under the auspices of the South Florida Annenberg Challenge (SFAC). The Council for Educational Change (Council) is the statewide successor of the SFAC. Initially, the PASS model was implemented through the Florida Council of 100 and its Educational Task Force. **The goal is to develop a partnership between two CEOs - a successful business leader and a school principal to improve the academic performance of**

students. The partnership is a hands-on model that unites the talents of business leaders, school leaders, and educational coaches. Most of all, PASS is a commitment by Florida's business community to leverage what it does best – running efficient, focused organizations – to improve the quality of public education.

**The Council for Educational Change
is proud to recognize**

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The three leaders in each partnership are referred to as the PASS triad, and much care is taken in bringing the players together. First, the Council seeks CEOs who are interested in assisting public schools and invites them to donate their time and \$100,000 in support of the reform effort.

Council staff members prepare the business leaders with an orientation designed to outline their roles and project expectations.

Next, school districts, contribute \$100,000 in-kind resources toward each

PASS school, and identify schools with student achievement needs including, but not limited to, a "C" or "D" grade in the state accountability system; failure to meet AYP in one or more categories; identified reading, math, science, and/or writing deficiencies; high minority or Free/Reduced Lunch populations; recent school trauma; or a newly established charter school, or specific curriculum project, etc. Additionally, the identified schools are perceived to be sites where the stakeholders would be open to outside help, thus increasing the potential for buy-in. Lastly, through a grant from the Florida Department of Education, the Council is ready to contribute \$100,000 in matching funds, and its staff selects a retired school administrator (the coach) to guide the group through its PASS Business Plan, framing the goals in both educational and business objectives.

This partnering of: (1) a dedicated principal, familiar with a school's challenges and skilled in school management and instruction, along with (2) a successful business person able to provide invaluable leadership mentoring and access to strategic community resources, and (3) an educational coach, with years of expertise in education and contacts throughout the school system, has proven to be an effective mechanism for initiating and maintaining positive change in numerous schools throughout Florida.

The model assumes:

1. Special conditions approved by district and board
2. Orientation of the Principal, CEO, Coach, School Advisory Council, supervisors, et al
3. Training for the team and school staff
4. Re-examination of school data and the School Improvement Plan
5. Modification of those plans based upon the new analysis
6. A three-year relationship
7. Regularly scheduled visits between the CEO and principal
8. Regularly scheduled visits at the school by the Coach
9. Evaluation of student performance through scheduled data collection and historian reports
10. Increased educational opportunities for students (programs, field trips, tutoring, etc.)
11. Incentives and rewards for staff and students



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Please Note...

This is a Guide for the entire PASS process; each chapter will be clarified and addressed separately to ensure maximum understanding and utilization.

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Four Levels of Engagement

A successful PASS program, particularly one that leads to sustained improvements in student achievement, can be viewed as having four levels of engagement. At each level, there are critical elements necessary to long term success of the PASS project at a specific school. Each level supports the emergence of the next. This chart illustrates the four levels of a successful PASS process:

Level One: Precursor Attitudes held by key figures before PASS begins

- Principal desires the PASS process, not just the funding
- CEO committed to donating his/her time, not just corporate money
- District supports the PASS process for the targeted school

Level Two: Faithful Implementation of the PASS Model

- School assessment of needs and development of a three year Action Plan, including measureable metrics
- Sustained mentoring relationships are ongoing among (CEO/principal/coach)
- Communication is ongoing among CEO/principal/coach
- Data driven decision making processes become part of the school's culture
- Continuity of leadership is critical for the three year program duration
- Rewards, incentives, celebrations are focused on goals
- PASS progress monitoring and adjustments are critical to the process
- Planning for sustainability occurs during years two and three

Level Three: Emergence of the Essential Leadership Behaviors

- Principal is persistent in pursuit of school improvement
- The Principal/CEO relationship is real and focused on change
- Expectations are focused on pursuit of academic achievement
- Data-driven decision-making becomes part of the school's culture
- Success is celebrated and used to point the way
- The Coach's role is focused on facilitating change
- Cooperation is promoted
- Capacity building is focused on developing professional skills
- PASS resources are focused on priorities and capacity building
- Old beliefs and new ideas may be tested to promote 'buy in'

Level Four: Planned Sustainability

- Planning for sustainability after PASS occurs during the PASS project.
- The leadership behaviors developed during PASS continue after PASS

Note: excerpted from *Follow the Leader, A Post PASS Sustainability Study*, August 2008

Program Process – Work Flow

1. PASS program is funded by the legislature
2. Although the PASS funds have been approved for the Council for Educational Change, the legislature gives the funds to the Florida Department of Education (FDOE)
3. The FDOE requests a proposal from the Council for the expenditure of the assigned resources, which they approve and confirm with an “Award Letter”
4. FDOE Resources are accessed in the following way:
 - a. **General PASS Support:** for Executive PASS, networking sessions, technical assistance, financial management, program coordination and other items that are written into the proposal – these funds are activated upon the submission of a “Reimbursement with Performance” form, accompanied by documentation of expenses
 - b. **PASS School Resources, required documentation:**
 - i. A fully executed/signed contract of commitment from a private entity(ies) to donate \$100,000 (or agreed upon amount) over the three year period of the PASS term.
 - ii. A three year customized business plan/proposal detailing the strategies that will be utilized during the PASS program term to complement the School Improvement Plan and stimulate student learning gains

This PASS School Business Plan is developed by the school principal, an identified partner CEO, and the school leadership team. (Included in the development of the plan is the PASS Coordinator and the school’s Education Coach).
 - iii. The three year business plan must be accompanied by a detailed three year budget and narrative. The Council provides financial guidelines for the expenditure of PASS funds.
 1. The FDOE resources must be expended in the fiscal year they were granted (by June 30).
 2. Private resources are utilized as per the grant agreement throughout the three years of the program.
 3. Budget items must be in accordance with the FDOE parameters for the expenditure of public money.

These documents are sent to the FDOE as deliverables. Concurrently, the PASS proposal is sent a school district representative for sign off.

NOTE: if the PASS Business Plan needs to be modified for unique circumstances, the PASS principal and business partner sends a written memorandum to the Council for review and approval. Subsequently, these are appended to the PASS school file.

Program Process – Work Flow (cont.)

The Council pays budgeted expenses for PASS program schools. The schools provide invoices to the Council for payment. The financial manager reviews submissions, (confirming appropriate supporting documentation), against the approved budget before submitting a check request to the CFO. The CFO/bookkeeper cuts the check and the Council's President and Executive Director signs the check. It is mailed either to the school or vendor, based on the principal's specifications. If the check request is for more than \$10,000 it must be approved by the CEO PASS partner and requires the Council to obtain a double signature on the check.



5. Council reimbursement for each PASS school is based on submission of identified deliverables.
6. Documentation is sent to the FDOE requesting reimbursement.
7. The Council is in communication with the Comptroller's office that audits the request.
8. The Council receives an FDOE electronic funds transfer for the approved deliverables.

Suggested PASS Timeline

Start date:	CEO briefing and commitment
Within 2 weeks:	School selected
Within 1 month:	Orientation Meeting
Within 6 weeks:	Principal/CEO planning and needs assessment; PASS Coach selected
Within 9 weeks:	PASS Business Plan & three year budget developed
Within 12 weeks	School Board recognition and PASS initiative approved
Within 12 weeks	PASS Kickoff Celebration
Year 1-3:	Each fall and spring of Partnership period a Monitoring Report will be completed and submitted to an external evaluator
Ongoing:	The Principal/CEO/Coach will meet by phone, email, conference on a regular basis
End of Each Year: Plan/Budget and	The Principal/CEO/Coach will Meet To review the PASS Business adjust strategies as needed
Ongoing:	Technical assistance will be provided by the PASS Coordinator/Council as requested/needed
Year 3:	The Principal/CEO/coach and PASS Coordinator will meet midway during the last year of the partnership to help plan continuing PASS initiatives

Creating a New PASS Model

A new PASS model typically follows these developmental stages:

1. Identification of CEO/Business Partner

- Potential CEOs are identified by Council, Florida Council of 100, foundations, local organizations or PASS coordinator.
- Council/Program staff holds a briefing meeting with potential CEOs and provides model overview.
- An interested CEO is invited to provide his/her expertise to assist in improving school performance.
- The CEO accepts the invitation to participate and confirms he/she will commit his/her time and \$100,000 to a low performing school for a period of three years.
- The financial guidelines are discussed with the CEO.
- Gift Agreement forms are provided.

2. Selection of PASS School

- PASS coordinator briefs the District Superintendent.
- PASS coordinator works with district staff to identify possible schools that meet PASS criteria.
- PASS coordinator reviews the school(s) demographics and student performance, examines other assets/deficits and holds an individual meeting with the school(s)/Principal(s). The CEO or CEO's representative may also attend this meeting
- PASS coordinator provides Council representative with a list of possible schools.
- When more than one school meets the criteria, the CEO and PASS coordinator meet to create a prioritized school list and makes site visits.
- The PASS coordinator, CEO, and district representative agree on a school.
- The PASS representative informs the Council of the school selection.

3. Selection of Coach

- The PASS coordinator and district staff may assist the Principal in identifying potential educational coaches.
- An ideal PASS Coach is a retired principal or district administrator who is familiar with the district, and has practical, hands-on experience in managing school improvement programs. University personnel may also be utilized as coaches.
- PASS Coaches may also be chosen for their expertise in a particular educational area, such as technology, reading initiatives, or curriculum development.
- In some cases, coaches are selected after the school's needs have been further reviewed.
- Principals are encouraged to utilize their network of contacts within the district to help identify potential coaches.
- Coaches are selected by the Principal and CEO.

Creating a New PASS Model (cont.)

4. Holding Orientation Meetings

- PASS Coordinator schedules an orientation session with the CEO, the PASS school Principal, the Coach (if selected at this stage), district personnel, and may include other members of the school or corporate leadership team.
- The orientation may begin with introductions followed by a brief tour of the school.
- PASS coordinator then conducts the orientation meeting covering the vision, organization, process of PASS, the roles and expectations of the CEO, Principal, and Coach, and the planning, budgeting and evaluation elements.
- PASS coordinator provides examples of PASS program kickoff celebrations announcing the PASS partnership to the school community.
- PASS coordinator discusses the next steps including a second planning meeting between the CEO and Principal.



5. Finalizing Financial Agreements

- Council staff works with the CEO to finalize financial agreements.

6. Planning and Assessment by CEO and Principal

- Tour the campus and visit classes, if not done previously.
- Discuss “a way of work” – how often to meet in person; phone calls; email; upcoming school events; School Advisory Council meeting dates.
- Review the existing School Improvement Plan.
- Discuss school needs in any of the following areas as appropriate:
 - Personnel
 - Utilization of technology in instruction
 - Office operations
 - Guidance services
 - Parental Involvement
 - Food service
 - Security
 - Performance appraisal (student, classroom and teacher)
 - Professional development
 - General management
 - Communications
 - Facilities and maintenance
 - Instructional equipment and supplies
 - Transportation
 - Community services
- Review current school budget and budget management philosophy.
- Identify instructional needs/goals based on needs assessment.
- Discuss possible additional goals for existing School Improvement Plan.
- Discuss possible staff and student incentives.
- Discuss how additional PASS resources can be utilized.
- Identify a “coach” if one has not already been selected.
- Determine a date for a PASS celebration “kickoff” event.
- Set the next meeting date.

Creating a New PASS Model (cont.)

7. Preparation of PASS Business Plan proposal

The Principal with input from the CEO/Business Partner and Coach will:

- draft a PASS Business Plan that identifies the specific initiatives that will be pursued to improve student academic performance; for each initiative that is included in the plan, the team should identify specific measurable actions, interim measures and/or benchmarks and expected outcomes. Prepare the PASS Budget
- develop incentive criteria based on student achievement
- prepare a timeline for each initiative

Sample Initiative:

Recruit tutors for the 50 lowest performing math students and provide two hours of one-on-one tutoring to each of them per month.

Measurable actions would include the number of mentors recruited and the number of actual tutoring sessions for each student.

Benchmarks and interim measures might be things like homework grades, test scores, scores on interim assessments

Expected outcome might be to reduce the number of students scoring below 3 by 50%.

8. Approval of PASS Business Plan and Budget

- The PASS Principal submits the PASS Business Plan and Budget to PASS coordinator.
- PASS Coordinator submits the PASS Business Plan/Budget to Council.
- Council staff prepares the PASS contract, obtains signatures.
- The contract and plan are submitted to the School Board as required.
- The School Board returns the board-approved contract to the Council.

9. Data Collection, Metrics, Monitoring and Assessment

- Each PASS relationship must identify metrics and establish procedures for gathering data that will enable it to monitor and evaluate its progress.
- The data should enable regular assessment of plan execution and interim measures assessing progress. It should also measure performance against long term goals. (e.g. submitting Historian Reports on a monthly basis.)
- Each PASS school is required to provide monitoring data to an independent external source for a review of progress. This evaluation process will involve annual interviews with the CEO, Principal, Leadership Team, and representative groups of parents, teachers, and students. In addition, student performance data will also be analyzed.
- Each PASS partnership must submit monitoring reports with corresponding metrics to the evaluator with a copy to the Council.
- The PASS Coach will assist in compiling data to be submitted.

10. Periodic Meetings

- Periodically, representatives from the PASS schools may get together to compare experiences, share successes and problems, and collaborate on common needs. The PASS representative will schedule and conduct the sessions. The meeting expenses will be paid through the school's PASS Budget.
- The PASS coordinator may schedule an annual meeting of all PASS partnerships. The meeting is intended as an opportunity to compare experiences, share successes and problems, and collaborate on common needs. The PASS representative will schedule and conduct the sessions. The meeting expenses will be paid through the PASS Budget.

The PASS Business Plan

The PASS Business Plan is an extension and enhancement of the existing School Improvement Plan. The Principal, CEO/Business Partner, and Coach will begin by reviewing the existing School Improvement Plan and all other existing needs assessment data.

After review of the data, the PASS team will develop additional goals and strategies or modify existing goals and strategies to further enhance student achievement initiatives. The PASS Business Plan is a three-year plan for the duration of the partnership. This plan may be modified throughout the partnership when further evaluation indicates the need to do so.

Setting Goals

The primary focus of each PASS partnership must be student achievement. Therefore, the partnership goals, as well as each implementation activity and budget amount, must be related to improving student achievement. The goals should be:

- focused on school improvement and student achievement
- measurable
- able to be monitored and evaluated

It is important to discuss the following before defining focus areas:

- existing School Improvement Plan
- inside workings of the school
- basics of school change/school improvement
- school's change/Improvement history
- recent/current efforts to improve the school
- benchmarks/metrics in place for measuring improvement
- student performance data at student, teacher, and classroom level

The Principal and CEO should identify target areas that may include, but are not limited to:

- | | |
|----------------------|-----------------------|
| ▪ curriculum | ▪ staff development |
| ▪ teacher strategies | ▪ parent strategies |
| ▪ literacy | ▪ community relations |
| ▪ technology | ▪ incentives |
| ▪ life experiences | ▪ student achievement |

Other suggestions on setting goals include:

- High Expectations: Set your expectations high with realistic goals to improve student achievement, but also be accountable for your goals and implementation.
- Student achievement: This should be the primary purpose behind each goal in the PASS model.
- School vs. Business: While the role of a principal is that of a manager and the CEO's role is to mentor the Principal to be a better manager, it is important to note the differences between a school and a business. They cannot necessarily be run the same way. The typical differences can extend to policies, incentive programs, and overall goals.

The PASS Business Plan (cont.)

- Strengths of the Partner: CEOs should respect the prior knowledge and organization of the Principal and staff. Likewise, the Principal and his/her staff should respect the new ideas of the CEO.
- Teacher/Parent/Community Buy-In: What goals will reflect the needs of all parties and create an ownership for teachers and parents? Gather their ideas and empower these groups.
- Active participation: Ask for, and receive, the full support and active participation of school faculty and corporate employees.
- Customize existing programs: If the problem is systemic, consider customizing the existing program for the children at your school, i.e. summer school.
- Long-Term Changes: Consider actions that will allow changes to continue once the PASS partnership has ended. Money is only short term and the school needs to build capacity to sustain the effort and changes. Also, consider how to build a culture of improvement at your school.
- Incentives: The customizing of incentives to each situation is important. Consider different models (i.e. school-wide vs. individual or teacher vs. student) and their purpose (motivation, reward). Also, incentives should encourage new behavior, not support current actions.
- Use the data and make modifications: Interpretation and analysis of programs is the best way to see what works in your school and what does not work, then adjust process if necessary.



Examples of Implementation Strategies for Your Consideration:

Please be advised, the ideas below do not constitute a checklist. After specific goals have been chosen, the Principal, CEO, and Coach must decide what strategies/programs to implement. The implementation plan should include specific overall goals, implementation strategies, description of activities, and a tentative timeline that will accomplish the goals.

Incentive Programs

- Celebration of "successes"
- Teacher recognition for "above and beyond"
- Student attendance
- Individual, class and school-wide test score improvements
- Innovative curriculum development aligned with FSA results
- Student recognition
- Periodic Rewards/awards
- Teacher attendance

Curriculum Programs

- Peer coaching
- Math/writing portfolios
- Align curriculum with goals
- Summer curriculum adjustments
- Reading/writing projects
- Monthly benchmark assessments
- Spiral curriculum
- Mentoring

The PASS Business Plan (cont.)

Teacher Strategies

- Teacher software
- Incentives
- Motivating
- Teacher monitoring
- Attendance/punctuality
- Parent/teacher tool kit
- Curriculum frameworks
- Training/effective teaching strategies
- Accountability measures
- Lesson plan reviews
- Back to basics

Life Experiences

- Career days
- College tours
- Etiquette training
- Community tours
- Field trips
- Guest Speakers

Technology

- Individual web pages
- Integration of technology into curriculum
- TV production center
- Tutoring
- Parental training/family literacy

School Administration

- Assessment/benchmarking task teams
- Identifying and removing hurdles
- Management by walking around
- Role clarification
- Grants to supplement needs
- Creative scheduling
- Training of staff
- Data analysis for new plans
- Aligned curriculum with goals
- School Improvement Plan review
- Reducing student/adult ratio
- Volunteers

Parent Strategies

- Make it/Take it Parent workshops
- Eye on student achievement
- Increased involvement
- Parent/family technology training
- Pre-school parent training
- Parent/Teacher tool kit

Literacy

- Increased number of books read
- Book Clubs
- Accelerated Reader
- Book of the Month
- Book Drives
- Classroom libraries

Community Relations

- Community calendar of events
- School achievement celebrations
- Participation in school events

Financial Procedures/Guidelines

Please contact your PASS Coordinator with questions regarding PASS financial procedures and guidelines. Your financial contact at the Council for Educational Change (CEC) is Doreen Outler, PASS Program Financial Manager. Doreen can be reached at:

Council for Educational Change
at Broward College Weston Campus
4205 Bonaventure Blvd., Suite 214
Weston, Florida 33332
Phone: 954-727-9909 Fax: 954-727-0990

* The PASS Coordinator will schedule and participate in a financial orientation meeting/or call with the principal, the school's budget bookkeeper, and Doreen Outler upon completion of the PASS Business Plan/Budget.

General

1. Corporate donated and foundation PASS grant funds are processed through a CPA firm for the Council for Educational Change (CEC). Each PASS partnership has a "PASS Grant" school account and all purchases, disbursements are charged to the individual school account.
2. A formal check request is required for any disbursement of PASS Grant funds. All check requests take about three weeks to process upon arrival at CEC. Mail check requests to Dr. Elaine Liftin at CEC with a brief cover letter. Dr. Liftin gives them to Doreen who reviews your budget to insure you have funds in the category/line item and the things requested are at least generally noted in the budget narrative. The requests are sent to the foundation's treasurer who completes the checks, returns them to Dr. Liftin for signature. The checks are then mailed to either the Principal or the company as listed on the request next to "SEND To."
3. It is important that you keep a file with all PASS financial documents in it. Keep a running log of your check requests/PASS expenditures at your school. It is also important that you keep a copy of mailed and faxed check requests, invoices, contracts, confirmed orders, etc. along with emailed or mailed correspondence related to PASS finances.
4. It is important to keep your business mentor informed about your budget. Discuss your budget periodically at meetings with your mentor. **All check requests totaling \$10,000 or more must be co-signed by the business mentor.**

Any single vendor purchases in excess of \$25,000 must have advance approval from the Council for Educational Change.

Grant Expenses and Check Requests:

1. Stipends – Work by teachers or staff must take place during "hours beyond contract according to district compensation agreements." If you want to pay someone a **stipend**, complete a separate check request for each person. Provide their name, social security number, home address and the reason for the stipend. Include dates, time, pay basis, and hours worked along with the completed check request. The person receiving the stipend must complete and initial a sign in/sign out sheet. The check will be sent to the school for the Principal to distribute. The home address is necessary for the Council to have as a 1099 will be sent to the stipend recipient if/when the total amount received is over \$600 for a calendar year.

2. Consultants – Coaches and trainers hired to provide assistance at new and continuing PASS partnerships. For each consultant you wish to employ, prepare a contract specifying job description, tasks required, and rate of pay and have it signed by both you and the consultant. An invoice from the Coach specifying completed tasks and dates of service must accompany the check request from the Principal. Neither DOE/Foundation nor private business dollars can be used to pay for “prepaid” consulting or coaching services. **Only services already rendered can be paid.**

3. Supplies/Instructional Materials/Equipment/Instructional Technology – To pay for supplies, instructional materials, audio-visual materials, computers and computer-based equipment, and software necessary to support the partnership goals and objectives, you must include invoices that clearly reflect a description of service type, number of units and cost per unit.

A. FDOE resources (Year 1) may only be used to pay for the following:

- Instructional materials/software
- Instruction technology
- Professional services/coach/consultant
- Stipends/supplements
- Assessment/data analyses/evaluation
- Program coordination

B. Private resources (Year 1, 2, and 3) may be used to pay for all of the above including items such as:

- Travel
- Staff development/workshop registration
- Student instructional activities
- Incentives
- Equipment
- Food/refreshment purchases
- Other as needed

The items need to support the partnership goals and objectives must include invoices that clearly reflect a description of services, number of units, and cost per unit.

Please note: If you are purchasing equipment, software, supplies, books, etc. - call the company, order the items and request a “confirmed order” that includes shipping. It should be **billed to (write your school’s name here) Elementary /Middle/ High PASS Grant** as well as faxed to you at your school. The information on the invoice should specifically list the “Bill To” and “Ship To” as your school not Council for Educational Change. Complete the check request. Forward the invoice to CEC immediately upon receipt. ‘

For a check to be issued to the company, include their address and information, state the purpose for the items, attach the faxed “confirmed order” and invoice from the company, and send it to CEC for processing.

4. Travel (from private resources) – All travel expenses must have an educational justification attached to the request. Travelers much use the FDOE travel form for reimbursement. If an individual is attending a workshop or conference, expenses must be "reasonable & necessary" (at the most economical rate) for airplane / hotel. Mileage reimbursement must include documented "MapQuest" type evidence. The mileage reimbursement rate is presently \$.445 per mile - round down to the nearest cent. **No reimbursements will be issued until after travel has been taken.**

5. Incentives and Rewards (from private resources) – You must use private matching funds to purchase educational items, such as books and educational games, to distribute to your program participants as incentives. If you award gift certificates to individuals as incentives, the award must be tied to the goals and objectives in your approved plan and allocated to your private matching dollars. **FDOE funds CANNOT be used for incentives.**

- A. If the PASS partnership decides to give a teacher a cash incentive, complete a separate check request for each person, include the social security number, individual's mailing address, and the reason for the incentive on the check request.
- B. If the PASS partnership decides to purchase gift cards or other incentive items, the principal may request a check made out to the company/store. Please state the purpose of the incentive on the check request. You must request this check be sent to the school principal who will pick up the incentive gift cards or incentive items; and secure them for safe keeping until distributed. Please utilize checks promptly to avoid them being voided.
- C. Please reconcile gift cards/incentive items promptly.

Every month send the updated incentive reconciliation list to Doreen Outler at CEC as the items are distributed. These documents are included in the CEC audit.

Gift cards to stores must be given to a specific person as an incentive and not used as “petty cash” for purchases.

6. Food Refreshment Purchases (from private resources) – The PASS partnership may only use private funds to pay for food. The Department of Education does not allow “refreshments” as an expense.

Some schools have local food stores they use regularly that give them a “store account” and allow the school to charge up to a certain limit. If this is your case and you have a sudden need for food (for a “just decided on an event three days from now”) and don't want to wait the three weeks necessary for PASS check request processing, you may consider charging food items to your local food store account and you may send the “store account” invoice with a check request to the Council.

You may also pay for food from a school internal account and then complete a check request to reimburse the school internal account.

7. Other Purchases - If the PASS partnership decides to purchase items for PASS and pay for them with school funds or personal funds and want to be reimbursed, a completed check request must be made out to the school with the purpose listed as “to reimburse (name of the school) Elementary/Middle/High school or “to reimburse Mrs. _____ for the purchase of _____ for PASS. Attach copies of the school's check(s) and number(s) or; if personal credit cards were used, **original receipts** documenting the school or person that paid the bill(s) and that is to be reimbursed.

8. We need your help regarding the documentation of your PASS expenditures.

All disbursements must be supported by adequate documentation, including but not limited to invoices, receipts, and timesheets. The Council PASS accounts are audited by external Board accountants, and are also subject to DOE audits. The following should be provided to Doreen Outler throughout the grant period:

- A. While we accept faxed check requests and faxed “confirmed order forms” to help process your needs more quickly, **we need all of the signed original requests and supporting documents mailed to our office for the audit.**
- B. Please send us originals of the packing slips/invoices/paid invoices as supplies, incentive items etc. arrive - this provides auditable documentation that the items were received by the school.
- C. For instructional technology, such as computers, include the packing slips/documentation in the boxes or mailed to you as they arrive and also a copy of whatever documentation /letters/forms you complete for the district showing the district has logged them as school property. Most districts require that when schools receive large items (for example computers, microscopes, equipment) that these be noted on a district property control (PC) inventory form. This is important so that if stolen or broken, such equipment can be replaced or repaired by your district, if they provide that service.

9. Council Support – The PASS partnership will receive a budget versus actual report on a quarterly basis. If you have questions, please reconcile them with the Council as soon as possible.

Please work with your PASS Coordinator and PASS Coach to ensure that resources are expended in a timely basis and appropriately support your program.

“Leaders are pioneers. They are people who venture into unexplored territory. They guide us to new and often unfamiliar destinations. People who take the lead are the foot soldiers in the campaigns for change . . .
The unique reason for having leaders – their differentiating function – is to move us forward.
Leaders get us going someplace.”

— Kouzes & Posner

The Role of the Principal

The school team (Principal, CEO, and Coach) will establish a "way of work" as a result of the orientation and training provided.

Assistance at a school can be divided into three parts – 1. Business/Managerial; 2. Analysis and Planning; and, 3. Curricular/Instructional. The team will use this focus, in addition to an overall perspective. The CEO will provide assistance in these areas. The Coach, while paying attention to the organization, will provide assistance in the reverse order. As a part of this effort, resources will be allocated for incentives and rewards for staff and students.

Principal leadership is the foundation for a successful PASS partnership. Under the PASS model, the Principal plays the following role:

Business Partner Relationship:

- Work with the CEO to develop a PASS Business Plan and Budget.
- Work closely and openly with CEO.
- Keep the CEO, Coach, and Coordinator informed of PASS initiative activities/events at the school and welcome them to participate
- Provide opportunities for CEO to visit classrooms
- Check with district about opportunities to recognize your CEO/partnership

Leadership:

- Make modifications in staff assignment and program implementation.
- Open the school to the change efforts.
- Schedule orientation for major players.
- Participate in orientation and training.
- Encourage and market program to faculty, parents, and community.
- Commit to remain at the school for three years, as possible

Budgeting:

- Submit budget amendments when necessary
- Access matching funds from state.

Evaluation:

- Attend annual meetings of PASS Principals, as appropriate
- Reexamine, modify, and adapt existing School Improvement Plan.
- Collect and analyze the benchmark data that is associated with each PASS initiative to determine whether the initiative is being executed with fidelity and whether the anticipated performance improvements are materializing.
- Complete monitoring, annual and budget reports, (financial realignments as necessary).
- Collaborate with third party PASS evaluation team.
- Document history of school and changes that impact PASS potential.
- Check with your district about opportunities to recognize your CEO/partnership.

Typically, PASS Principals have either been recently named to their positions, or are fairly new to the school. PASS works most successfully in schools that have an existing vision, are open to change and new ideas, and have the support of their teachers and parents.

The Role of the Business Partner

The school team (Principal, CEO, and Coach) will establish a "way of work" as a result of the orientation and training provided.

Assistance at a school can be divided into three parts – (1) Business/Managerial, (2) Analysis and Planning and (3) Curricular/Instructional. The team will use this focus, in addition to an overall perspective. The CEO will provide assistance in these areas. The Coach, while paying attention to the organization, will provide assistance in the reverse order. As a part of this effort, resources will be allocated for incentives and rewards for staff and students.



- √ A CEO-Donor or funders may commit a \$100,000 over a three-year period.
- √ PASS Grants of \$75,000 or \$50,000 may also be awarded in increments.
- √ The designated CEO-Mentor should commit at least 1+ days each month of his/her time, and utilize the human resources of the corporate partner in support roles.
- √ The CEO-Mentor should consider PASS as a "priority" activity within his/her scope of activities.

By bringing the business perspective to a PASS school, the CEO assists the Principal in becoming a stronger leader and manager. The CEO plays the following role in the PASS program:

Mentoring:

- Initiate, time for orientation and training.
- Mentor one or more days per month and be available by phone as necessary.
- Make time for Principal visits to the company.
- Create a true partnership, easy telephone, and email availability.
- Do not use PASS for a commercial agenda.
- Attend annual meeting of PASS community for specific school needs.

Financial/Resources:

- Uphold financial commitment.
- Work with the Principal to develop PASS Business Plan and budget.
- Use company resources as appropriate—volunteers, Human Resources Dept, etc.

The Role of the PASS Coach

The school team (Principal, CEO, and Coach) will establish a "way of work" as a result of the orientation and training provided.

Assistance at a school can be divided into three parts – 1. Business/Managerial; 2. Analysis and Planning; and 3. Curricular/Instructional. The team will use this focus, in addition to an overall perspective. The CEO will provide assistance in these areas. The Coach, while paying attention to the organization, will provide assistance in the reverse order. As a part of this effort, resources will be allocated for incentives and rewards for staff and students.

Coaches are professional educators who understand the public school system, have curriculum expertise and desire to make a positive contribution. The Coach plays the following role in the PASS program:

- Work as an employee and on behalf of the CEO and Principal.
- Complete an assessment of school change issues within 90 days of initiation.
- Serve as an educational advisor to the partnership.
- Focus on curricular/instructional needs with the Principal.
- Assist with identification and selection of trainers, if appropriate.
- Have flexible time, approximately two days per month (for three years), during the school year to meet with partners.
- Be cause-driven, not money-driven.
- Assist with monitoring and annual reports.
- Assist with data compilation and evaluation (metrics).
- Serve as a trainer when appropriate.
- Meet with other coaches and school teams.
- Attend annual meeting of PASS partners.

Coaches may be: experienced, high performing, retired principals; retired district personnel; or university personnel. They need to have experience working with adults in training, mentorships, or development modes. While coaches are paid for their services - employees of the CEO/Principal, their focus must be on the relationship, not the time clock. They must have flexible time available.

"Coming together is a beginning, Keeping Together is progress, Working Together is success."—Henry Ford

The Role of the PASS Coordinator

The PASS Coordinator team will manage the PASS activities at the Council for Educational Change. Resources for individual's school assistance will be set aside in the agreements for each school. The PASS Coordinator team responsibilities will include:

Recruiting/Stewardship:

- Assist in identifying/recruiting of sponsors, business partners, and Executive PASS partners/mentors.
- Making semi-annual presentations to the Council for Educational Change at Board Meetings
- Arrange whole group and/or small group meetings statewide and by area of the "PASS family" as appropriate.
- Working with school districts in selecting potential PASS and Executive PASS schools.
- Conducting orientation sessions for new relationships, (partnerships)

Guidance:

- Conducting or arranging for a facilitator to conduct initial "way of work" planning sessions.
- Assisting in the development of the PASS Business Plan and implementing PASS procedures
- Conducting quarterly review of partnership financial status and taking appropriate action to insure program support.

Evaluation:

- Reviewing and ensuring that the appropriate data is being collected, analyzing that data to evaluate and report on the fidelity of implementation and providing ongoing progress assessments.



The Role of the School District

Many Florida Public School Districts have embraced the PASS model, which supports their existing school improvement initiatives. Support at the district level is fundamental to the success of individual PASS partnerships.

In order for a District to participate, the District may select one or more schools. Each of those schools should have a principal who is relatively new to the school. Furthermore, the District must try not to move the Principal to another school for the three-year duration of the project. Finally, the District must agree to provide flexibility to the school.

The role of the school district includes:

- Identifying possible schools that meet PASS criteria
- Participating in orientation meetings
- Assisting in identifying possible coaches
- Committing to keeping the Principal at the PASS school for three years (as possible)
- Providing flexibility to PASS school
- Providing ongoing support to partnership
- Facilitating the collection and analysis of student performance and other measures to gauge the fidelity of implementation and effectiveness of the PASS business plans.

“Leaders attract the voluntary commitment of followers, energize them, and transform organizations into new entities with greater potential for survival, growth, and excellence. Effective leadership empowers an organization to maximize its contribution to the well-being of its members and the larger society of which it is a part.” - Burt Nanus

STATE ACCOUNTABILITY RULES HAVE CHANGED!!!!

Overall Impact...

- The criteria for current school grades are based on Florida Standards Assessments (FSA) in English Language Arts (ELA), Mathematics, and end-of-course exams in Algebra 1, Geometry, and science.
- Letter grades are determined by utilizing the four achievement components, four learning gains components, as well as learning gains for the lowest performing 25% of students. When appropriate, a middle school acceleration component, along with graduation rate and college and career acceleration are also used.

Impact on PASS Schools...

- The letter grade alone does not reflect successful completion of specific academically focused PASS projects, nor the attainment of improved learning gains in key subject areas.
- We need to consider the "value-added" that PASS resources and the executive leadership elements provide for the school, the Principal, and the leadership team.

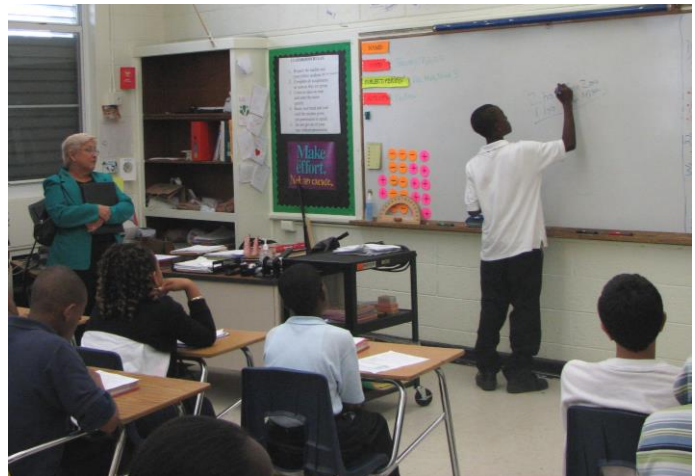
Role of the PASS Historian

The goal of the PASS program is to increase the academic performance of the students and to improve the school overall. This is done through the development of a PASS Business Plan which includes: identified areas of improvement; evidence of improvement; and actions required to meet the goal(s). This plan is important as it serves as a roadmap to guide the PASS activities for school improvement.

PASS programs have produced meaningful and measurable results. In order to share these results, and assist with the monitoring of a particular PASS program, the position of Historian was created.

The Historian may receive a stipend and be expected to:

- Meet with the PASS Leadership Team that will develop the PASS Business Plan. This team will identify goals and areas of improvement. Further, they will identify what data (metrics) are available to assess whether or not progress is being made toward the accomplishment of the goal. (Ex. If the goal is to improve daily student attendance by a certain percentage, the daily attendance bulletins as well as the overall attendance at the end of the grading period are appropriate measures.)
- Based upon the identified goals of the PASS project, collect available student achievement data which traces whether or not improvement is being made in a specific subject area and/or grade level. (Ex. District or school level benchmarking data would be utilized to determine student progress in science.)
- Complete a monthly of Historian Report form of activities which have been undertaken at the school in support of each of the identified goals. Submit a copy of the Historian Report form to the Principal and the PASS Coach.
- Meet with the PASS Leadership Team as appropriate, especially when it is evident that mid-course corrections need to be taken to meet the identified goals of the PASS program.
- Be available for a phone interview with The BETR Group (the successor organization to Evaluation Team at the University of Miami) at the conclusion of the school year,



Evaluation and Metrics

Each PASS school is involved in three evaluation activities:

1. an annual self-evaluation shared with other PASS representatives
2. an annual student performance analysis conducted at the direction of the PASS Coordinator, and
3. an on-going evaluation conducted by The BETR Group (successor to the University of Miami Evaluation Team) under an agreement with the Council for Educational Change

Each PASS school's Action Plan is unique, and each school's evaluation is based on its objectives; therefore each school's evaluation will be unique as well. Given the stated PASS program objectives:

- What metrics will be collected to determine if plans are being implemented, whether those plans are producing the intended results and whether goals have been achieved?
- Indicate how often data will be collected (e.g. monthly, quarterly)
- Specify who will collect and report this data (to the BETR Group, Donor, etc.)

However, there are common trends and metrics that each school can track to measure the impact and progress of the PASS model. **The following are suggested trends for consideration:**

General:

- student learning gains
- graduation rates
- attendance trends (students and teachers)
- tardy trends (students and teachers)
- discipline referrals
- parent complaints and commendations
- enrollment/completion in advanced math and science courses
- enrollment/completion in students taking AP and dual
- overall parental involvement and parent participation in PTA meetings
- active participation on SAC committee
- increase in volunteer hours contributed by community members
- Increase in community partners and donors

Measuring Collective Impact

1. Identify goals, measurable objectives, and use of data-informed decision-making
2. Develop metrics for benchmarks and indicators; including how and when data will be collected
3. Describe what success looks like based on data

The end result is a scorecard that measures collective impact.

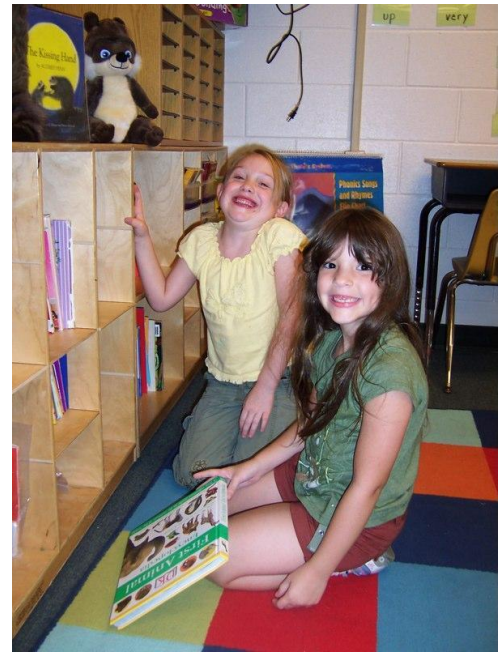
For individuals to get better at what they want to do, they need constant reinforcement and feedback. In order to provide effective reinforcement, metrics need to be collected frequently to evaluate the trends and offer positive feedback.

Evaluation and Metrics

- Increase/decrease of students withdrawing from the school in the middle of the term but not changing residences.
- Increase/decrease of students coming to the school in the middle of the term but not changing residences.
- Increase/decrease percent of students participating in programs like Reading Counts etc.
- Students below level 3 or below B with a written plan identifying their gaps and steps to close and how often are those plans reviewed with the student by an administrator or guidance counselor.

Extra Curricular Activities:

- increase of students attending Saturday school or after school Extended Learning sessions
- performance of students attending Saturday or evening sessions vs. their peers who also needed help but chose not to attend
- parents attending evening ESL classes (if applicable)
- increase of students participating in various academic, cultural or athletic clubs/teams
- parents attending music concerts, athletic events, etc.
- increased attendance at community board meetings, Chamber of Commerce meetings, etc. by the Principal, AP, etc. and how many of Rotary, Elks, Chamber, etc. members regularly participate in SAC?
- What community service activities are students regularly engaged in and how many students are participating?



Magnet Schools

- How many students are returning to your magnet school programs?
- How over or under enrolled are your magnet programs?
- What percentage of the eligible population chooses to attend your school?
- How many students are actively using the media center or other instructional resources

"I start with the premise that the function of leadership is to produce more leaders, not more followers"

- Ralph Nader

Lessons Learned*

What general advice would members of the PASS partnerships offer those who wish to become involved in PASS?*

The PASS partnership is an excellent opportunity to make a big difference in participating schools. All PASS partners agree that the program has positively impacted the overall school operation but most important, student achievement. The partnership has provided means to offer the needed instructional resources to the learning environment, thus, creating a paradigm shift in the climate, culture, vision, and mission of the schools. Some partners described as the most rewarding aspect, to see the partnership making these remarkable changes in the educational environment.

Interacting with experienced mentors has resulted in PASS Principals' growth. Being touched by the PASS initiative, has afforded principals the opportunity to gather new ideas and ways to become a more effective leader. It has affected the Principal's leadership by strengthening their skills when interacting with other leaders and those accomplished in the field of education as well as the business world. As a result, PASS Principals consider themselves more confident and involved with their teachers and staff in a collaborative decision making. As stated by one school principal: *"Planning with successful leaders has been a tremendous growth for me as a school leader."*

Plan really well when considering how to spend the money. To know the real goal of the funds and see the money as supplementary not supplanting, is highly recommended by principals. PASS partners are aware of the need to optimize the use of discretionary funds offered by the PASS partnership especially under the budget restrictions due to the economic recession. Therefore, spending money cautiously will help accomplish the goals set forth in the program.



Teamwork and commitment facilitate the triad's work. Partners are aware that having a really good plan of action and a clear understanding of their goals leads to school progress. Being committed and involved as part of the process will allow the triad to support each other, stay on task and be organized for a more effective result. As recommended by one Coach: *"Be committed. See yourself in ways that you can be a mentor."* In addition, the earlier the triad gets involved in the process and the more stable they are while being part of the PASS program, the more successful their work as a team will be.

* extracted from the 2011-12 Evaluation Report from the University of Miami