

K-12 Partnership Report

Getting the Most From Your Volunteer Program

Strategies for recruiting, retaining, and getting the most out of your volunteers

To build a strong volunteer program, it helps to get lots of volunteers; it helps more to get the most out of every volunteer that you have. To figure out what motivates your volunteers to give their all, consider the question: “Why do you volunteer?” If you brainstorm a list for yourself, or with a group of people, you’ll discover major hints as to why others volunteer also.

These are some reasons people volunteer:

- To make a difference
- To use skills that I don’t get to use at work
- To connect with other people
- To use my God-given talents for the common good
- It’s a family tradition
- It’s a family expectation
- To participate in and support activities my children are interested in
- To expand my skill base – try new things (like fund raising, for example)
- To travel (which I didn’t know could happen, but it has sure helped me explore a lot of places)
- To help youth have a voice
- To influence policy and elections
- To influence or manage my children’s schedules (if I am coaching I get to set practices and can actually be there)
- To bring about change in something that frustrates me or I think is wrong

What’s on your list? If you’re wondering how this will help you build a successful program, read on!

#1 reason

The number one reason people volunteer is that “Someone asked me personally.” You can capitalize on this strategy by:

- Asking a potential volunteer to do something specific
- Saying why you think they’re the best person for the job
- Not sugarcoating the amount of effort involved or implying that the volunteer role is “lesser than” a full-time role

Most of us love a challenge. Give people a challenge and say why you think they’re up to it, and why this is a job absolutely for them!

Four motivators for volunteering/partnering

There are four key motivators that prompt people to volunteer. If you examine your list then I’m sure you will identify your lead motivator. This is not an either/or situation; we don’t all fit neatly into one category or another. Understanding the four motivators will help you think about volunteer recruitment, management, retention and recognition in a more global and inclusive way.

The four motivators:

1. To contribute (make a difference)
2. To affiliate (gain a greater sense of belonging)
3. To gain status (to practice community leadership)
4. To learn

Most people won’t say that they volunteer to gain status. It seems too egotistical to talk about acquiring status for volunteer work. However, it is a real motivator for those who are in leadership roles. And all of us like recognition.

If you observe how organizations such as churches, community groups, and civic and political clubs work with volunteers you will get a sense of which groups best utilize their volunteers.

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The importance of the four motivators

Once you understand why a person or an organization would volunteer for, or partner with you, you'll know how to recruit, retain, and recognize your volunteers/partners. One lesson I learned from the American Red Cross is that they have a volunteer position equal to every staff position – and they fill them. High expectations! High results!

Think about a person you'd love to have as a volunteer, or a position you want to fill that is important to your overall program. What do you think would motivate someone to volunteer to fill that position? Consider a school with a volunteer coordinator position to fill. Someone who is fairly affluent and does not work out of the home may appreciate the "status" that a position like this holds. If a person is less skilled or professionally trained, they might appreciate the opportunity this position provides to learn and build their skills for use in a future paid position..

The Rotary Club taught me about the importance of status. The roles of board members, officers, committee chairs, and other volunteer positions all filled in the name of making a difference and serving the common good were quite impressive. That organization also taught me about expectations: you must attend X number of meetings, spend X amount of time doing community service, etc. There is status in maintaining high expectations. This was a really important, great lesson to learn.

Understanding someone's lead motivator also helps you think about how you will retain the person, and how you should recognize them for their good work. One of the best recognitions one of our volunteer school coordinators ever got, according to her, was a parking space with her name on it, reserved at all times. She volunteered about 55 hours a week on site at a high school. Someone asked her what they could do for her, and she told them. It was great recognition. It conferred status, but also provided real convenience for her to have a prime parking space with her name on it. She had certainly earned it.

Job descriptions

All volunteer positions should have job descriptions with expectations, goals, and details included. Make the job description just as detailed as if you were paying the person. Obviously, things like what hours they serve may have to be worked out individually – but if you don't ask for something, you won't get it. Start with a general job description, and then tweak it with the person as you develop the position. Some job descriptions may remain somewhat generalized, such as one-to-one reader with an elementary student. Leadership positions or specialized positions deserve and require specialized job descriptions.

Now you understand the importance of personally inviting a volunteer to support your organization, you have a basic awareness of the four motivators and know that you need to write a job description for each type of volunteer position. How do you tie this all together?

The seven steps to successful volunteer management

Most people understand the seven steps of successful volunteer management somewhat intuitively, but the best volunteer programs make sure these steps are explicitly laid out for everyone who works with volunteers. Every volunteer coordinator should understand and implement these basic principles. They include:

1. Identify needs
2. Recruit volunteers
3. Assign volunteers
4. Welcome and train volunteers
5. Retain volunteers
6. Recognize volunteers
7. Evaluate volunteers

Let's look at each of these steps in more detail.

1. Identify needs

No one needs extra, ineffective or under-utilized people underfoot. Don't just think about the schools in this regard. Identify your needs at a central office or district volunteer office, as well.

Volunteers, as we defined it in our school-business-

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community partnership program, were people we didn't have to pay that would do an exceptional job that fits a real need. Therefore, this included people who might get course credit, or sorority/fraternity credit, or subsidies, or even paid through work study. For the school district I coordinated, it was about getting additional time from qualified people without costing additional money. Identifying the purpose or the need was paramount to this being successful.

2. Recruit volunteers.

Getting the right person for the right job – that's it, isn't it? This is where the four motivators come into play. This is where asking personally comes into play. Do you need to ask everyone yourself? Of course not. But does everyone need to be asked personally by someone? Yes! Start with key positions – leader of a volunteer program, a fundraising effort, or the first volunteer in a 3rd grade unit. You can't afford to be unsuccessful in recruiting any of these positions. Make sure to do it right. Get the right person, in the right job, with a detailed job description. And make sure the right person asks them to sign up.

Obviously, there is no way that you or the school volunteer coordinator can know every volunteer who responds to your outreach. You must follow school district procedures (or create them) to ensure the safety of the children and youth. For us, this included a criminal background check for anyone who was serving as a one-to-one mentor. For others we checked references. To ensure safety we had a policy that no adult and youth could be in a room by themselves. An adult staff member must be within visual range at all times.

Use job applications for volunteer positions to match the recruit with the assignment. This works just as if you were hiring a person for the job, so view it the same way.

3. Assign volunteers.

Make sure the job description is clear and understood by the person filling the position. The supervising educator or staff member and the volunteer must both clearly understand and agree to expectations, anticipated outcomes, and performance measurement criteria.

Additionally, assess each volunteer's skill level and knowledge. They should fill out an application just as if they were applying for a job. References are a must. After all, they will be working with or around our children.

4. Welcome and train volunteers.

Do not skip this step. Make sure that every volunteer completes an orientation session and receives training.

Orientation needs to cover everything from "where do I park?" to "what if a student is disruptive?" Typically, orientation sessions will be similar, if not identical, for most volunteers at that site. Anyone entering the site regularly needs to know the same things. An orientation

and tour of the building is one way to make sure that the person feels you value them and care about their success.

Training should be specific to the position. I've seen numerous occasions where a volunteer gets assigned immediately (no training) to work with the most difficult student in the class. That is unfair to everyone involved. Educators have extensive training on how to deal with a variety of young people with special needs and special talents. Do not put new volunteers in this situation. Orienting and training the staff on how to work with volunteers is particularly important for this reason.

Likewise, work with the staff and orient/train them on how to work with volunteers. Educators are used to working in classrooms, most often as individuals with a lot of young people. To add another adult is not a natural event, and the overall manager or school coordinator may need to help the educators help themselves in this way. If you have one or two willing and interested staff members, start with them first. Word will spread. Success breeds success. Make sure that the staff member working with the volunteer knows the expectations, responsibilities, and how to best utilize the volunteer. Lack of communication in this regard is a formula for disaster.

5. Retain volunteers.

You have the best chance of retaining volunteers if you are attentive to recruitment, assignment, orientation, training, recognition and evaluation. Pay attention to your volunteers' lead motivators so that you know how to retain them. If you know why people volunteer with you, you'll find it easier to make sure they get what they want from the experience. You'll retain more volunteers if you provide a "career ladder" for volunteers who are interested in expanding their skills and influence, just as employees would.

6. Recognize volunteers.

Many volunteers are humble. Volunteerism is service. However, I've learned that recognition really motivates and rewards the people who support your organization. When I've received recognition as a volunteer, I found that the increased responsibility and faith people put in me was really satisfying – it let me know I was making a difference and that the group believed in me.

The type of recognition you provide should reflect your volunteers' motivation:

- Affiliation is important to some, so make sure they're part of something like a school improvement team or school party. The person who wants to affiliate may also appreciate receiving personal notes from educators and students.
- Those motivated by status might want an article in the newspaper, or a letter to their boss saying how well they are representing the company.

- A person who wants to learn should have additional opportunities to take classes offered to staff members (computer classes are a real hit).
- An appreciation gathering for volunteers can meet many needs, one for status (recognition), affiliation (they belong to this site and group), and contribution (noted when the people are individually recognized). Individual testimonials from the volunteers who share what they have learned can fulfill the fourth motivator.

Remember also that recognition does come in many forms. Think about these options:

- Years of service recognition ceremonies/small gifts
- Lunch with principal and volunteer coordinator
- Notes from the students
- Valentines from the students
- Special name tag to wear in the building
- Special parking place
- Flowers
- Opportunity to take a computer class with the students
- Access to the media center or library
- Letter to their supervisor at work
- Involvement in school improvement planning process

Gallup research reveals that in great organizations, staff members (including volunteers) receive recognition about once a week. This included everything from a warm greeting to words of appreciation or a hug.

7. Evaluate volunteers

A necessary evil, no. A necessary investment, yes. Take the time to meet with your volunteers to find out how it is going for them. This shouldn't be a once-a-year-in-May thing. Make it a quarterly "touch base" with a formal sit-down at the beginning of the year to review the job description and make sure everyone is on the same page, and at the end of the year to assess outcomes. Above all, listen to what the volunteer is saying – are they feeling fulfilled, engaged, appreciated, and a part of the culture of the school or site? This system of evaluation should focus on helping the volunteer improve and helping the organization work with the volunteer better.

Do you ever fire a volunteer? Absolutely. You must make sure your volunteers meet program expectations, behave appropriately, show respect to staff and students, and are healthy (no drugs or alcohol). Follow a due process, to some extent, if you believe the volunteer has growth potential. If not, manage the situation in conjunction with the school administrator to remove anyone who does not serve the students or school well. Make sure that no volunteer is discriminated against

for race, religious, or ethnic reasons. I once had to fire a lawyer for breaking the rules and taking a student off campus. I expected a lawsuit or mess in the newspaper. Thankfully, we must have handled it correctly by explaining the rule, reminding him of the orientation/training where this was clearly articulated, noting that his behavior left us no choice, and thanking him for his service.

Is it worth it?

With all of this in place, is managing volunteers worth it? Absolutely!! Volunteers in our schools bring us additional time and add their energy to our schools. They serve as great ambassadors in the community to raise awareness of school needs and advocate for public education.

The matrix

For samples of a volunteer job description, application form, or interview placement/assignment template, please contact me at BarbaraJoFrank@aol.com.

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An Interview with “Dr. Mentor”

What mentoring is, how to do it well, and what it can do for both children and adults

Dr. Susan Weinberger, known as “Dr. Mentor,” is a leading authority on mentoring and the founder and President of the Mentor Consulting Group. She is a consultant to various federal and state government agencies involved in mentoring, and has written several books on the subject, including *Business Guide to Mentoring* and *The Mentor Handbook*. In 1993 she received the Volunteer Action Award from President Clinton for her work in mentoring.

KPR: *Let's start by talking about what mentoring is.*

Weinberger: Years ago, mentoring was defined as a one-on-one relationship between a caring, wiser, older adult and a child who could benefit. But we have had to change that due to the different configurations we see now. It is no longer necessarily one on one. It is no longer an older adult. But it is certainly somebody who's caring and wise. It's basically a structured and trusting relationship that brings young people together with caring individuals who offer guidance, support, and encouragement aimed at developing the competence and character of the child being mentored – “the mentee.”

Some of these programs are one on one, others are in teams or groups. But the key here is that the mentor offers guidance and support in a relationship that is aimed at developing character. And I should emphasize that mentoring is not a tutoring program.

KPR: *So you would frame mentoring strictly as a social or character program, and not an academic one.*

Weinberger: That's correct. Although it's interesting that the US Department of Education has laid out three goals in their grant programs dedicated to mentoring. Children being served by a program should improve their academics; they should decrease their unexcused absences; and the mentoring relationships created through the program should be sustained for at least one year. And we'd like that to be longer of course.

Now when we say academic improvements, we do not mean that the mentor serves as a tutor. To me, a tutor – and this is a major point – is someone who typically is hired or volunteers to spend six months with a child to improve their grade from a D to a C in math. And there's an expectation on the part of parents and teachers that the grade will improve. What we're looking at with mentors is that every week, when you meet with your mentee, you ask them how they're doing, how they are, and how school is going. And if their report card came out last Friday, you say, let's take a look and see where

you're doing well and not so well, and what I can do to help. And at that point the child may say “well, I have a homework assignment in math that's due tomorrow – can you help me with it?” That is voluntary and mutually agreed upon between the two. With tutoring it's the parent or teacher saying what needs to be accomplished.

My favorite word for a mentor is an advocate for a child. If the mentor sees that the child is having trouble in reading or math, they can go to the school to see what resources are available to help their mentee.

KPR: *Are there variations on kinds of mentoring relationships? A lot of what I'm hearing from the corporate world is that their mentoring programs are designed to introduce kids to a certain field or industry.*

Weinberger: Yes. In addition to the different mentoring configurations – one on one, team, group, buddy, e-mentors – you also have the location of the mentoring. That can be at a site or in the community, like the Big Brother Big Sister Program. But then you have the focus of the mentoring, and that depends on the program and what they feel they need to emphasize. Some companies want to prepare young people, especially older ones, with certain skills, or for certain careers. We call that career mentoring. And typically the mentor that comes from industry will be matched with a youth who has a similar interest, or at least could develop an interest. And there are many businesses today that are investing time in these young people as the future workforce.

Some mentoring programs are only social, teaching kids about social skills, and a little bit about employment preparedness – helping the with interviewing skills, encouraging to pursue postsecondary education, helping them with financial independence, writing a resume. It really depends upon the focus of the program, and each one seems to be a little bit different.

KPR: *Even those social mentoring programs can help with workforce preparedness, since they're teaching many of the soft skills that lead to being a good employee.*

Weinberger: I believe that the two are extremely important. I don't care how much an individual knows going in to an interview – if they don't know to look you in the eye, shake your hand, provide you with a resume, and have the manners and etiquette that are so important – they won't get the job. I think the knowledge is only 40% of what gets you the job. So the combination of the social skills and business skills is critical.

KPR: *In terms of mentoring programs in general, is there any sort of “sweet spot” in terms of mentee age or population of the target audience that benefits most from mentoring?*

Weinberger: We’re finding that some programs begin as early as kindergarten, and that the major focus of programs being funded today seems to be in the late elementary school years, around 4th and 8th grade. If you try to match a junior in high school with a mentor, they often have some other issues in their life that they need to deal with. They’re getting ready for college, getting ready to drive, looking for a part time job, raging hormones...unless you’re matching them with a business mentor, and there is an incentive there to give you a better shot at a job, or a mentor who is only going to work with you to help you get into college and guide you, they’re not really interested. But if you match a younger child with a mentor, they can travel up the grades together and develop a long-term relationship of trust and confidence. So you’ll see that the major mentoring relationships occur around 4th to 8th grade. And if you want to use the Department of Education as a yardstick, their grants, around \$50 million per year, all focus on programs in grades 4-8.

KPR: *You mentioned that the USDE grants are generally focused on social outcomes. What are the most appropriate target outcomes for mentoring programs?*

Weinberger: I definitely think that one of them is staying in school – said another way, eliminating school dropouts. The Department of Education’s hope is that there will be fewer unexcused absences. What we have found as an outcome of mentoring programs is that youngsters who didn’t come to school every day, and maybe didn’t get pushed out of bed after the weekend to come on Monday, because there was no one there to encourage them, suddenly are coming to school to see their mentor, and to not disappoint their mentor. And to reinforce that, one of the things we highlight in mentor training is that they should ask how many days their mentees were in school last week, even if it’s a community mentoring program. This is something that we all strive for, because if a youngster is in school every day, they’re bound to do better academically.

In addition to keeping them in school, we look at keeping them away from risky behavior like drugs, alcohol, and gangs, and from going to the principal’s office for the wrong reasons, like fighting or bullying. This is another group of expected outcomes, and we are beginning to see some positive outcomes in those areas.

KPR: *Like many things, I’m sure it’s easy to do mentoring wrong.*

Weinberger: Yes, it’s very easy to do it wrong, and that’s why we have standards, called the Elements of

Effective Practice. You can find these standards at www.mentoring.org.

I should note first that there are both informal and formal mentoring relationships. If you think back to the people who impacted your life, it could have been your mother or father, a neighbor, a member of the clergy, or a favorite coach who taught you responsibility and how to behave. Those are informal mentoring relationships and should not be confused with what we’re talking about today. There’s no time requirement, no regular mandated contacts, and no real entrance requirements. But formal mentoring programs have certain aspects and standards.

First of all, they’re long term and deliberate. And there is typically a third party leading the effort, like a broker or a matchmaker. It’s an organization like Big Brothers Big Sisters, a school, a business, a youth agency – but there’s someone acting as a third party to put this together. Typically there is a minimum time requirement, universally accepted as an hour a week. Big Brothers Big Sisters used to require 4-5 hours on a Saturday, but they found over time that it’s harder and harder to get that commitment. School-based mentoring came along and we were able to expect an hour a week of release time from a business mentor. At school, in a safe environment, the business mentor could interact with teachers and counselors all in one place, and in that one hour a week we were able to see some strong outcomes.

All mentoring programs have to have a comprehensive screening and matching process. These are called the quality assurance standards in mentoring. All mentors have to go through a criminal background check, a check of employment history, last 5 places of residence, personal and professional references. All are required before a mentor meets with a youth.

Beyond the screening, which is so critical, mentors and mentees have to both be trained so they understand the policies and procedures of the program, including gift giving and physical contact, and reporting of abuses – everything is covered in the training. Then they’re matched, and they meet at least one hour a week. One area that we focus on is the ongoing support of mentors and mentees. After a few months a mentor may say that he or she doesn’t know whether they’re making a difference, and this is an opportunity to look at the strategies being used, and to see if something needs to be changed.

And mentoring programs have what we call closure steps when it’s time to end the mentoring relationship. I’ve been involved in a long-term mentoring relationship – we started when she was 7, and we’re still going now that she’s 22. But we can’t expect that all matches will last a lifetime – you can only ask a mentor to commit to a year. But if we’ve done it right, we can ask the most important question: are you interested in returning for a second year, and hopefully the answer will be yes.

And finally, part of the standards involves evaluation. And evaluation is something that mentoring programs used to shy away from, because program leaders really didn't have those skills. But today you cannot get any kind of funding, either from the federal government or from private foundations, states or school groups, unless you can demonstrate how you're going to determine outcomes.

KPR: *When you talk about funding – if I'm a corporate HR person or a district person looking to start a mentoring program, what are the primary areas of cost?*

Weinberger: Well it's been figured out – people will vary a little bit, but the least expensive are school-based programs because there's so much provided on an in-kind basis in terms of supervision and materials. Roughly, a school-based mentoring program runs around \$600 a year per child, or per match, most of which is in-kind because usually a school employee, like a guidance counselor, social worker, nurse, assistant principal, or school psychologist will run the program as an add-on because mentoring is so powerful as an initiative to help youth in the school.

Community-based mentoring requires more staff. Case managers supervise fewer matches because they're spread out in the community and they have to be very careful about monitoring. And so it's predicted to cost

double, or \$1200 a match, with less in-kind support. But in those community-based programs that don't work with established sites, like schools, churches, YMCAs, or Boys and Girls Clubs, case management is more costly, and rightly so.

KPR: *For a business that's looking at this as a workforce or social initiative, what kinds of returns can they see from their involvement?*

Weinberger: This is one of my favorite questions. Even though I work with community groups and churches and hospitals and all sorts of populations, my favorite question involves corporations and their return on their investment. In the early 1980s when I created school-based mentoring, it was almost totally an investment of the corporate community in Norwalk, Connecticut where this got started. We had a lot of Fortune 500 companies like Pepperidge Farms and United Technologies, banks and others, and the idea was that if the corporations could be convinced that it could be beneficial for them to provide work release for their employees of an hour a week for these programs, everyone would win. So I did some research and saw that most businesses today want employee retention, productivity, satisfaction on the job, morale, leadership, pride, and social responsibility. And there are studies out there in the U.S. and Canada that show consumers prefer



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to buy from companies that are good corporate citizens. So I tie that in when I go to a company to talk to them about the benefits, and I tell them that the benefits are two-directional, and that the employees benefit as much as the kids themselves.

The first study I did to prove this was with Allstate Insurance in Northbrook, Illinois, and I've done it elsewhere since that time. And what I found is that the mentors who took off an hour a week returned to work happier, increased their morale, increased their satisfaction with their job, they felt better about themselves, they learned more about themselves, improved their own values, and for those working in the schools, they improved their understanding of the schools. And this eventually led to help with funding for the schools. It's my theory that you don't ask companies to help you with the financial woes of the schools. You ask them for human capital - the mentors - who go into the schools and see for themselves how much is lacking in the schools and then go back to their companies and foundations to seek monetary gifts and matching contributions.

We also asked employees at the beginning of these studies if they thought they would improve their attitudes

at work, and most said no - but at the end of the studies, more than 75% said yes, we did improve our attitudes, and we got a fresh perspective on life. And they have indicated in large numbers that they appreciate that their company cares about the community. And 100% of participants in every study I've conducted agree that small social programs can make a difference. So when companies ask what's in it for us, I tell them - and can show them - that they're going to have a much happier workforce. And it does help a company's image in their communities.

It's much more than getting your picture in the paper - while the companies love that, and while we should give them that kind of recognition, a happier and more productive workforce is the real payoff. And for the companies who are having to lay people off in today's economy, they should strongly consider offering programs like these to help improve the morale of the remaining employees.

Mentoring is not the panacea. Mentoring is "simple but not easy." But there are a lot of lives that have been changed, and if you dedicate yourself and do the right things in the right way, we're all going to reap the benefits.

Targeting *The Forgotten Middle*

New report from ACT suggests earlier intervention in career and college preparedness

Much of the work in K-12 reform and improvement today is happening at the high school level: states and education organizations are working to align graduation standards with postsecondary entry requirements, implement dropout prevention programs, and develop career and college awareness and preparedness programs (including mentoring, internships, and other programs).

While these are all important initiatives, focusing on high school-level reform exclusively ignores a simple fact: students entering high school are generally not prepared for high school-level work. In fact, only 30% or so of 8th graders are proficient in reading and math, according to the National Assessment of Educational Progress, and trying to accelerate unprepared high school students to meet exit requirements is an exercise in remediation, not enhancement. To make a real difference in college and career preparedness, one must start earlier in the process - in the middle, or even the upper elementary grades, to be exact.

This is essentially the conclusion drawn by a new report from ACT, the nonprofit organization best known for its eponymous college and workforce preparedness assessments.

In *The Forgotten Middle*, ACT presents the results of its research into this issue, concluding that "under current conditions, the level of academic achievement that students attain by eighth grade has a larger impact on their college and career readiness by the time they graduate from high school than anything that happens academically in high school." In fact, compared to the level of achievement in eighth grade, the predictive value of other factors, such as family background or high school coursework were small or even negligible.

For those managing or developing a career/college preparedness initiative, this report makes a compelling case for rethinking the program's theory of action. Remediation programs are certainly worthwhile, but for those who want to see significant improvements in preparedness, it may make sense to start earlier than high school.

Resource Link

ACT Report: *The Forgotten Middle*
www.act.org/research/policymakers/pdf/ForgottenMiddle.pdf

Operation Excellence

The vast majority of business/education partnerships focus on improving student outcomes through direct or indirect engagement at the classroom or individual student level. However, there are other opportunities for engaging the business community, and for those willing to think outside the classroom, the rewards can be quite remarkable.

One example comes from the Montgomery County Business Roundtable for Education (MCBRE), a nonprofit operating in Montgomery County, Maryland (north of Washington DC). One of the organization's first community/school initiatives, Operation Excellence, is an example of a nontraditional partnership model that fully leveraged the time and talents of business partners and had a dramatic influence on school, and ultimately student, outcomes.

The origin of Operation Excellence

When Dr. Jerry Weast joined Montgomery County Public Schools (MCPS) as Superintendent in 1999, he brought with him a firm belief in the value of building strong relationships with the business community. He had seen the impact of such relationships in previous districts and immediately began reaching out to local business leaders upon his arrival in Montgomery County.

Dr. Weast was one of the local leaders who brought about the creation of MCBRE in 2000. The organization was founded, and continues to operate, as a bridge for the creation of strategic business/education partnerships, focusing on connecting classroom learning to the workplace and on improving the quality of school operations. The organization emphasizes communication and collaboration between the district and the business community: Dr. Weast sits on the board, and district officials are involved in the design and planning of major initiatives.

Within two years of the organization's founding, Michael Subin, President of the Montgomery County Council, asked the Executive Director of MCBRE to coordinate a study of targeted business operations of the district. The goal of the project, according to the Operation Excellence summary report, was "to use business acumen to identify ways of making some of the MCPS business processes more efficient and effective with the idea of re-allocating the savings to the instructional programs of MCPS, which directly benefit the children of the county."

While district leaders in some areas would be wary of such an initiative, MCPS leaders embraced the opportunity due in part to three factors:

- The Superintendent placed a high priority on community engagement, particularly on bringing the business community into school operations as true partners.
- The project was proposed in order to increase resources flowing into instruction, not simply to reduce budgets overall.
- While MCBRE was a new organization, school and community leaders had worked on a similar initiative in 1993 called the Corporate Partnership for Managerial Excellence (CPME). The majority of the recommendations of CPME had been implemented and all parties viewed it as a success.

Operation Excellence

Where:

Montgomery County, Maryland

Partner(s):

Montgomery County Business Roundtable for Education; Montgomery County Public Schools; multiple individuals representing various businesses

Challenge:

Find efficiencies in district operations so that funds freed up could enhance instructional efforts

Solution:

MCBRE, working with representatives of MCPS and the local business community, targeted four operational areas and put together a team to study each one and provide suggestions for improvement.

Partner Roles:

Two community leaders, Jane Rudolph with Lockheed Martin and Larry Bowers with MCPS, led the project, identifying areas of study and working with MCBRE staff to recruit and manage partners for each team. Team members worked together for three months to analyze existing operations and make recommendations.

Outcomes:

The district realized several direct and indirect outcomes. They were able to rethink strategic approaches to building maintenance and cleaning and lobby for new equipment, all of which significantly reduced hiring needs in those areas. Further, acquisition of software in call center and financial operations areas improved capabilities in those areas.

Indirectly, several of the business partners continued their support for the district after the project ended, and many gained knowledge they could apply to their own work. The district, through this and other community engagement efforts, continues to build support throughout the county.

Project design and implementation

MCBRE selected two people to structure and lead the initiative. The first was a representative of the business community who sat on MCBRE's Board: Jane Rudolph, Vice President of Strategic Analysis and Development for Lockheed Martin. The second was Larry Bowers, Chief Operating Officer for MCPS.

Working together over the course of several weeks, these project leaders identified four operational areas to review, based in part on Bowers' analysis of where improvements could be made and efficiencies found. These included:

- Facilities management
- Financial management
- Technology management
- Baldrige certification

According to Larry Bowers, "This was a partnership that allowed businesspeople to share their expertise on the operations side of the shop. It can be difficult to involve people on the education side because for some it's not their background, but when it comes to business operations, they're extremely familiar and have a great deal to offer."

Once they had identified these target areas, Rudolph and Bowers, with the help of MCBRE staff, put together a set of strategic questions for each area, a step that helped guide their selection of business partners. Altogether, Operation Excellence recruited 25 business leaders and 13 district leaders to fulfill the goals of the project.

MCBRE recruited people based on their individual expertise, regardless of whether their companies focused primarily in the target area in question. As Jane Rudolph notes, "Lockheed Martin supported the team with people out of our financial community to help look at their financial systems. That's not normally what you would think about Lockheed Martin doing, but as we saw where their needs were, we looked across our organization to see how we could contribute to the effort. Clearly, we work with large-scale financial systems here, and we wanted to bring that experience and expertise to look at their systems to see what they might need to make them more efficient."

Once teams were assembled in each focus area, those teams were given three months to analyze current operations, review options, and make recommendations. Each team established their own structure, workflow, and meeting schedule. A kickoff was held at the County Office Building on June 18, 2003 and the results were submitted to MCBRE by the business leaders on or around September 25, 2003. The final recommendations document was made public in October of 2003 in a presentation to the Montgomery County Council.

Participants in Operation Excellence

Presented by Title and Organization

Baldrige Management

MCBRE Business Partners

- Vice President, Education and Construction Services
- Vice President, Bank of America
- Professor, Corporate Learning Office, Defense Acquisition University
- President and CEO, SABU, Inc.

Montgomery County Schools Partner

- Coordinator, System-wide Continuous Improvement

Facilities Management

MCBRE Business Partners

- Director of Business Development – Shapiro & Duncan, Inc.
- Director of Property Management – Foulger-Pratt Management, Inc.
- Executive Vice President - Complete Building Services, a Donohoe Company
- President - Pioneer Building Services, Inc., a Foulger Pratt Company
- Director of Engineering - Foulger-Pratt Management, Inc.
- Project Executive Education Construction Services - Bovis Lend Lease
- Vice President, Business Development – Sodexo

Montgomery County Public Schools Partners

- Director, Department of Facilities Management
- Director, Division of School Plant Operations, Department of Facilities Mgmt.
- P.E. Director, Division of Maintenance, Department of Facilities Management
- Assistant Director, Division of Maintenance, Department of Facilities Mgmt.
- Maintenance/Facilities - Randolph Area Manager
- Maintenance/Facilities – Bethesda Area Manager
- Maintenance/Facilities – Clarksburg Area Manager

Financial Management

MCBRE Business Partners

- Director, Public Affairs, Comcast
- Director of Affinity-Networks Solutions, Comcast
- Senior Financial Analyst, Lockheed Martin
- President, Giacalone & Associates
- Director, Call Center Operations, Comcast
- Manager, Public Affairs, Comcast
- Group Vice President, and CIO, GEICO
- Business Operations Director, Lockheed Martin
- Finance Director, Lockheed Martin

Montgomery County Public School Partners

- Chief Financial Officer
- Community Partnerships Specialist

Technology Management

MCBRE Business Partners

- Director of IT Academic Svcs., Montgomery College
- Public Sector Client Consultant, Hewlett-Packard
- Vice President, IBM
- Sr. BP Operations, Phillips International
- Vice President, United Communications Group

Montgomery County Public School Partners

- Office of Global Access Technology (OGAT), Electronic Graphics and Publishing
- OGAT Director, Information Services
- OGAT Special Assistant for Special Projects and Grants

Direct outcomes of Operation Excellence

After MCPS and the County Council reviewed the partners' recommendations, they decided to put several into place; this include allocating funds from the council for needed software and equipment. Some examples highlighted by Larry Bowers include:

- The partners found that the district's financial management software, first purchased in 1983, was incapable of meeting current needs. They identified a new system with the necessary features, and the business partners successfully lobbied the County Council for the funding. "Businesspeople are influential advocates," said Bowers. "Elected officials look to business leaders for input."
- Business partners also lobbied for the purchase of equipment that allowed the district to forgo the hiring of additional building services staff.
- The partners established a different strategic approach to cleaning, going from a model with one person handling all duties within an area to a team model that moved through a facility together.
- Maintenance staff are deployed differently as a result of the team's recommendations. They have significantly reduced staff time on the road by having staff handle multiple work orders with each site visit, going to the extent of cross-training some staff members to increase their capabilities. Materials delivery models were also restructured.
- Call center operations, particularly those in the district's employees and retiree services office, were improved as well. United Healthcare was particularly helpful in giving team members a tour of their call center facility, walking them through UHC operations, helping the district choose and purchase call center software, and helping set up a center within the district office.

As a result of these and other improvements, the district has not hired any additional maintenance staff since 2003, despite adding six million square feet of facility space. (Additional staff have been hired in building services, but not at all in proportion to this growth.)

Indirect outcomes

In addition to the cost savings and improvements made possible as a direct result of this campaign, the district has realized several indirect outcomes.

First, many of the business partners involved in Operation Excellence have continued to support the district and to advocate on its behalf. This has been helpful in ongoing improvement efforts and, more broadly, in advocating for the district with the County Council and others.

While the school district was intended as the beneficiary of this project, many of the participating businesspeople reported learning a great deal through the process as well, particularly in areas such as the implementation of Six Sigma programs (used by MCPS as part of its Baldrige efforts).

Also, according to Jane Rudolph, "One thing we learned through this process is that, in a number of areas, MCPS is doing a fabulous job - there were really no efficiencies to be gained. It's good to have that kind of information about a public institution - it instills confidence on the part of businesses and others in the community."

Due in part to the openness of the district to this effort, and the respect it earned from its business partners, MCPS continues to garner support and strengthen its reputation within the community. According to Larry Bowers, the district has seen a net increase of 6,000 students coming from private institutions over the last eight years, and its market share has increased from 80% to 84% of school-aged children in that time.

And the collaborative approach the parties brought to Operation Excellence has helped MCBRE and MCPS build a strong and trusting working relationship that has allowed for additional successes over the years. According to Heather Schwager, Executive Director of MCBRE, "Since 2003, MCBRE and MCPS have worked together to support the district's efforts on project management, diversity and inclusion in the workplace, and the impact of generational differences in the education process. All of these initiatives were made possible thanks to the groundwork laid by Operation Excellence."

While business/education partnerships that call upon the professional expertise of the business community may not be common, the work of those involved in Operation Excellence shows that they can have a dramatic effect on district operations and on stakeholder relations. As district leaders work to address the challenges presented by today's economic climate, they should consider the benefits of such initiatives and approach their business partners accordingly.

Resource Links

Montgomery County Business Roundtable for Education
www.mcbre.org

Operation Excellence Recommendations Report
www.mcbre.org/Library/OperationExcellenceResultsFinal.pdf

Montgomery County Public Schools
www.montgomeryschoolsmd.org

Corporate Partnership for Managerial Excellence Report
The 1993 predecessor to Operation Excellence
www.quality.org/tqmbbs/govt/cpme.txt

Skills-Based Volunteering at Deloitte

Promoting an approach to employee volunteering that generates greater value for all

Many larger businesses encourage employees to volunteer in the community, and schools in particular have benefited from these corporate volunteer programs: businesspeople are often found reading to or mentoring children, helping teachers, or improving facilities. But is this the greatest value these volunteers can bring?

Deloitte, one of the largest consulting firms in the country, began asking this question four years ago. The firm had a longstanding commitment to community involvement, which was fulfilled both through direct giving and through the volunteer efforts of its workforce. As it sought ways to increase the impact of its efforts, company officials began looking at the utilization of its volunteering employees.

According to Lori Grey, Senior Manager for Public Relations and Community Involvement at Deloitte, “When we looked at the value of our employees’ time, we saw that their volunteer work was valued at around \$18 an hour - but the value of their professional time was much higher. And so we wondered whether there were opportunities for our people to provide greater value by contributing their professional skills.”

Through their own analysis, coupled with the results of their annual IMPACT surveys (see sidebar and links), Deloitte’s community involvement team determined that skills-based volunteering could provide a marked increase in value to the communities in which it works, while at the same time fulfilling internal objectives such as skills and leadership development.

In addition to promoting skills-based volunteering to employees and to the nonprofit community, Deloitte has taken steps to build awareness of the concept, including:

- Launching the Problem Solvers Fund, which provides grants to support community initiatives where Deloitte employees are engaged in pro bono and other skills-based volunteer projects.
- Supporting, and participating in, the Pro Bono Action Tank, an initiative of the Taproot Foundation to promote skills-based volunteering and public/private partnerships.
- Establishing a national partnership with College Summit, providing funding and expertise to help in areas such as improving the capabilities and speed of their data reporting system.

“Educating employees and nonprofits about the value of skills-based volunteering is an ongoing process,” says Lori Grey, “but the benefits are substantial for everyone involved. This will continue to be an area of focus for us.”

Resource Links

Deloitte Volunteer IMPACT Research
www.deloitte.com/dtt/article/0,1002,cid%253D162408,00.html

Deloitte Community Involvement
www.deloitte.com/dtt/section_node/0,1042,sid%253D2255,00.html

Pro Bono Action Tank
www.doitprobono.org/pbat/

Select Responses from Deloitte Volunteer IMPACT Surveys

Select Responses from the 2005 Survey

(Survey of 1,093 employed adults)

- 78% believe that volunteering offers the opportunity to develop skills that can be used at work; 93% believe it offers the chance to enhance leadership skills.
- 79% believe volunteering in the community can help an individual advance his or her career.

Select Responses from the 2006 Survey

(Combined surveys of 200 nonprofit directors and 750 white-collar workers)

- 89% of nonprofit directors realize that volunteers’ workplace skills are extremely or very valuable to their organizations, and 77% agree that they could benefit significantly from corporate volunteers focusing on business practice improvements.
- 73% of volunteers believe their workplace skills are valuable to a nonprofit organization.
- Despite these beliefs, only 12% of nonprofits typically align tasks with volunteers’ workplace skills, and only 19% of workers say their workplace skills are the primary service they provide when they support a nonprofit.

Select Responses from the 2007 Survey

(Survey of 1,000 adults ages 18-26)

- 62% of Gen Y respondents agree that they prefer to work for a company that provides opportunities for them to apply their skills to benefit nonprofit organizations, but only 29% say that their current company offers such opportunities.
- 74% believe that their work-related skills or talents are valuable to a nonprofit.

Select Responses from the 2008 Survey

(Survey of 500 corporate HR managers)

- 91% of HR managers agree that skills-based volunteering would add value to training and development programs, particularly as it relates to developing business and leadership skills
- Despite that, only 16% of companies make it a regular practice to offer such opportunities for employee development, and of those who do, only 13% offer it to all employees. The rest limit participation to management and above.

The Florida PASS Program

There are many varieties of educational partnerships and several ways they may form. Among private partners, there are businesses, institutions of higher education and various forms of private non-profit entities. Schools may also partner with one of the various governmental agencies that are responsible for education, ranging from the United States government down to the local school board. For the past decade, some schools in Florida have experienced a “perfect storm” of collaboration on both fronts through the Partnership to Advance School Success (PASS), a program of the Council for Educational Change (CEC).

At its heart, PASS is an executive mentorship program, focusing on school improvement by starting at the top: teaming local CEOs and school principals to build and execute a school improvement plan backed by public and private financial support. According to Steve Saiontz, CEC Chairman, “First and foremost, the goal of PASS is to raise and sustain student achievement. This happens through the development and empowerment of the Principal’s leadership with the help and support of a CEO - and that is the heart and soul of PASS.” PASS is based on several best practices involving the use of incentives and rewards, data-driven decision-making, infusing business success strategies, and best use of human capital; all of these flow from the empowerment of the Principal’s leadership. It is the catalyst for improving student, educator and school performance.

The evolution of PASS

The PASS program was conceived by the Florida Council of 100, a nonprofit composed of the CEOs of the top 100 businesses in the state. Dr. Elaine Liftin, CEC’s current President and Executive Director, with the help of educational expert Dr. John Hansen, worked with the Council of 100 to develop the concept into a working model, with all of the components that make up PASS and the support system to help schools implement and grow their models successfully. This happened when Dr. Liftin was the President and Executive Director of the South Florida Annenberg Challenge (SFAC).

“PASS is all about business leaders sharing their most valuable currency – what they know and do best – with principals and educational leaders,” said former governor Jeb Bush, under whose administration the initiative was founded. “For the first time, CEOs and principals were sitting down and deciding together what their needs were, what the goals should be, and how to get there.”

Working with Governor Bush and Lieutenant Governor Brogan and Commissioner of Education Gallagher, the Council of 100 developed and implemented “leading edge” policies for improving educational achievement. The Bush/Brogan A+ Plan provided a blueprint for education reform in Florida. In testimony before the House Committee on the Budget, U.S. House of Representatives, Washington, D.C., September 23, 1999, Governor Bush described the A+ plan. “The A+ Plan is built upon the foundation of three fundamental principles,” he told the committee. “The first principle is meaningful and undiluted accountability -

The Florida PASS Program

Where:

Florida (statewide)

Partner(s):

Council for Educational Change (formerly the South Florida Annenberg Challenge), which manages the program it designed with the Florida Council of 100; CEOs of Florida companies; principals of selected Florida schools

Challenge:

Help underperforming schools not currently receiving focused assistance to improve student performance throughout the school

Solution:

Help principals to develop a school improvement plan and enhance their leadership and management skills; ensure that schools have the resources needed to implement their improvement plans by securing financial and resource support from state, private, and district sources

Partner Roles:

The Council for Educational Change, the State of Florida, and the district offices of participating schools provide financial support to allow for the implementation of school improvement plans. CEOs of participating companies also provide financial support, and commit to spending three years working with the principal as a mentor to analyze the current state of the school, craft an improvement plan, and serve as a mentor for the principal as the plan is enacted.

Outcomes:

Since the program was launched, large numbers of PASS schools have improved according to their scores on the Florida Comprehensive Achievement Test (FCAT), with many of these C- and D-ranked schools moving up at least one grade level. Further, many of the schools participating in earlier stages of the program have maintained their improved scores.

there must be different consequences between success and failure. The second principle is zero tolerance for failure, and the honesty and the courage to point it out where it exists,” he continued. Thirdly, we “zealously believe that our educational system must be child-centered, not system-centered or even school-centered.” In other words, the educational universe should revolve around the individual educational needs of each and every child, not the other way around.

The group of Council of 100 members dedicated to developing this program, known as the Task Force to Close the Gap in Education, evolved into the PASS working group, which set two priorities: to support the A+ plan and to develop a program to improve the performance of low performing schools.

PASS in action

With financial and other support of the SFAC, PASS was established as a school improvement plan designed to improve student performance over three years. Florida has a grade system for each of its schools, from A to F; PASS has focused on schools that received a C or D rating according to Florida’s standards. The PASS founders did not focus on F schools because those schools were already getting so much attention and resources. Those standards were based on student scores on the Florida Comprehensive Achievement Test (FCAT) and have since been expanded to include other indicators. The goal was to move selected schools to a B or an A grade.

The PASS program gets businesses directly involved in school improvement. Each participating business offers \$100,000 over three years, with matching funding from SFAC. The school district in which the school was located agrees to contribute through repositioning and matching resources. In addition, CEOs commit to mentoring the school’s principal. “For the first time, CEOs and principals were sitting down and deciding together what the needs were, what the goals should be, and how to get there,” said Governor Bush.

While each school has its own improvement model, they all have the following elements in common:

- Each principal of a PASS school has two supportive colleagues – a CEO with management and leadership experience and a coach with educational change background.
- Each PASS school examines its current status, decides where it needs to go, and begins the process of marshalling its resources to move the organization toward its goals.
- Each PASS school changes itself as it continues its day-to-day operations, an approach called “reengineering in place” by the business community.

- The PASS effort retains the positive attributes already held by the school, the district, the community, and its personnel.

In addition to the school rating a C or D under Florida’s standards, PASS officials sought principals who were amenable to change and those whom the school district was willing to support. They also looked for support from teachers, School Advisory Councils, and supervisors.

With these guidelines, the first seven PASS schools were established in September, 1999. With promising results from the first year of partnership, 19 additional schools were chosen to participate over the next three years. In 2002, the Council of 100 and the SFAC decided to institutionalize the PASS Program and transferred control to SFAC, which soon changed its name to the Council for Educational Change. Currently, there are 80 PASS models at 70 schools (some schools have adopted more than one model). The CEC continues to mobilize public and private resources to effect change in Florida schools.

The PASS model has had an effect on schools throughout Florida. “The use of detailed student performance data to benchmark, chart and monitor student achievement” has been adopted throughout the state, said Dr. Liftin. “This was revolutionary when PASS introduced student performance data systems and analysis to schools, and from PASS, it has spread to become common practice.” In addition, a secondary “Executive PASS” has been established, a model similar to PASS but without the formal financial commitment. Executive PASS is in place in 40 schools in Miami-Dade, Orange and Hillsborough Counties.

The CEC offers a number of case studies to illustrate how PASS works. Two of them, West Riverside Elementary in Duval County and Bent Tree Elementary in Miami-Dade, showed significant progress during the partnership. West Riverside went from a D to a B and Bent Tree went from a D to an A.

West Riverside School

West Riverside in Jacksonville was among the first schools chosen for PASS. The partnership involved Kevin Twomey, President of the St. Joe Company, and Principal Frances Gupton. Twomey visited the school several times to observe Gupton at work. After becoming familiar with the principal’s workday, Twomey suggested effective ways of delegating her many daily tasks so that she could put more focus on instructional leadership and time in the classroom. “I truly think that the mentoring from the CEO is the most powerful piece of the PASS program,” said Gupton.

After straightening out the administrative end, the team began to focus on improving teaching to boost

student achievement. “When we began the partnership with St. Joe, we introduced our new logo, ‘If We Believe, We Will Achieve,’” said Gupton. “Adopting this logo was the first step in putting the focus on student achievement. Before PASS, we were all being pulled in too many different directions, with the students ending up on the losing end.”

West Riverside implemented a teacher incentive program which focused on a number of aspects of school performance. These included improved attendance, punctuality, written lesson plans aligned to the curriculum and increased time spent on quality instruction. Teachers who met the criteria received \$1,000. During the initiative, 23 of the 28 eligible teachers received the bonus.

The addition of data collection to identify and address problems filled out the picture. “It’s exciting to see teachers take test data (both standardized and teacher-developed) and use the results to make a difference in their classroom,” said Gupton.

Bent Tree Elementary

At Bent Tree Elementary in Miami-Dade, the Principal and CEO put the focus of their PASS partnership on using technology to promote inquiry based instruction. Principal Bart Christie and Armando Codina, CEO of The Codina Group, introduced “Kids Win With Technology,” a project designed to improve student performance in reading, writing, and mathematics. In conjunction with school staff, they examined how the Internet could be used to promote learning among students, parents and teachers beyond the boundaries of the classroom. This project incorporated Florida’s Goal 3 Standards, which directly address the skills that students must acquire to become effective,

successful workers in the 21st century.

The Bent Tree PASS partnership was implemented with the following objectives:

- Strengthen inquiry-based teaching and learning through the use of the World Wide Web.
- Implement student writing and mathematical projects and post them on individual teacher web pages.
- Prepare classroom environments to incorporate technology into the daily learning process.
- Improve teacher access to the Internet and a variety of educational software.
- Increase family involvement in the educational program.
- Enhance community involvement in the school’s educational plan.

Each classroom at the school was outfitted with at least two Internet-linked computers for daily student/teacher use. They expanded access to the Codina/Bent Tree Computer Lab. As a result, students and parents were able to access home learning assignments, age-appropriate websites and complete curriculum-based online activities.

They opened the Codina/Bent Tree Computer Lab three evenings a week for families who were unfamiliar with computers or the Internet. Honor students from the local high school offered free tutoring to parents. Student incentives, such as water bottles, school key chains and mouse pads, were provided for those who attended the computer lab in the evenings.

Teachers participated in onsite computer training sessions and maintained portfolios that demonstrated their application of these training sessions. Teachers also developed individual web pages that were linked to the school’s web site. Students were assigned regular writing assignments, including computer-generated samples and projects; teachers maintained an Internet portfolio of these activities, which were presented to parents in evening workshops. “Parent response was favorable, and students demonstrated academic gains along with a more positive learning attitude,” said Bart Christie.

The community shared in the excitement generated by PASS. Recognition in the Miami Herald and local community magazines as well as the business publication, Florida Trend, has promoted school-wide pride and a continued effort to strive for even further achievements. Over the three-year partnership, Governor Jeb Bush, Florida Education Commissioner Charlie Christ, Secretary of Education Jim Horne, and State Senator Alex Diaz de la Portilla visited Bent Tree Elementary. During the spring of 2002, the Miami-Dade County Commission presented the school with a Proclamation of Bent Tree Elementary Day.

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Outcomes to date

In 2006, CEC received the results of an evaluation conducted by the Evaluation Committee under the leadership of Board Member and Evaluation Chair Lynne Wines. The committee considered four important factors when reviewing evaluation data: impact on student achievement, institutionalization of program best practices that contribute to increased achievement, contribution to CEC mission and priorities, and identification of ways to improve, sustain, and scale-up programs.

Evaluators analyzed school performance by looking at the 2006 Florida Comprehensive Achievement Test. The majority of PASS schools started with a C or D by the statewide scale. In addition, the evaluators note, PASS schools are among the most significantly challenged in Florida.

Among all PASS legacy schools, 2000-2003:

- 22.2% now A
- 22.2% now B

Of those active schools in the third year of PASS:

- 43% made an A or B this year
- 43% increased one or more letter grades this year

Among active schools in the second year of PASS:

- 40% made an A or B this year
- 20 % increased one of letter grades this year

Among all active PASS schools:

- 41% made an A or B this year
- 29% increased one or more letter grade this year

And among active and Legacy Schools combined:

- 43% made an A or B this year
- 30% increased one or more letter grades this year

“The results achieved through the Council’s efforts are impressive,” said Daniel K. Aladjem, Principal Research Scientist for the American Institutes for Research. “Especially impressive is the impact [their] work has had on student achievement, school performance, and meeting the needs of school leaders.”

In addition to its analysis of school performance, the evaluation team provided a number of “lessons learned” which suggest that the PASS activity is widely applicable. Those lessons learned include the following:

- Principals are the catalysts and facilitators of change. An empowered principal links vision and the reality.
- Principals must create an environment that supports academic success and helps all stakeholders to understand and support change.

- Districts and school leaders statewide can work as a unified force for improvement.
- When business, community, and higher education representatives devote time and expertise to school reform efforts, student achievement improves. Their onsite presence and advocacy validates the importance of the partnership.
- Teachers working in diverse urban classrooms need intensive and individual professional development for school-wide initiatives to take root. They must be able to apply this training to improving student academic performance.
- Innovation must be directly tied to student achievement goals and supported with resources at the school site.
- Partnerships are cost-effective and yield a “return on investment” in enhancing student achievement. Findings indicate that the cost per student of implementing an entire project (\$73) was about the cost of a few hours of private tutoring.
- When principals had discretion, flexible school funding contributed greatly to the success of innovative programs.
- No excuses: Whatever the challenges, all schools, including those with high-need populations, can make significant achievement progress when given proper resources and leadership.

As PASS has demonstrated, it is possible to make dramatic gains in school performance by focusing on leadership development with the support of private and public partners.

Written by Tony Fowler of ToMolly and Friends.

Resource Links

The Council for Educational Change
www.changeeducation.org

The PASS Program
www.changeeducation.com/PASS/

Florida Council of 100
www.fc100.org

The Bush/Brogan A+ Plan (summary by Council of 100)
www.fc100.org/documents/bushbroganreport.pdf

The Bush/Brogan A+ Plan (audio of Jeb Bush speech)
70.166.63.240/podcasts/bush.mp3

The Council has also published a book on PASS, entitled *PASS It On...Make a Difference*. To order, contact:

The Council For Educational Change
3265 Meridian Parkway, Suite 130
Meridian Business Campus
Weston, FL 33331
phone: 1.954.727.9909 toll free: 1.866.268.0250
Fax: 1.954.727.0990 email: sistywalsh@aol.com

Engaging Business Leaders

How to improve the interaction between your business community and your students

The days of “adopt a school,” or the one-time photo opportunity in which a business leader presents an oversized check, mugs for the camera with a couple of students, and then leaves the premises so the teachers can get on with teaching, are over. Engaging business leaders in your school’s program is critical to sustaining the relationships which can provide a variety of resources, both financial and human, for your students. The old adage rings true: “It takes a village.” And the business community is part of the village that can help educate young people and motivate your students to achieve goals they never thought possible.

One of the best ways to engage business leaders: use an advisory board structure. A typical advisory board includes 15–20 business leaders. These local community members are active business leaders, but are also actively interested in the well-being of the community that supports their businesses, including its education system. These business leaders agree to join together for the good of the students. They meet regularly (at least twice a month), form committees, assign roles, set goals and work together to achieve those goals. Depending on the structure of the advisory board, goals may be set largely by the learning community members, such as counselors, the principal, or others; the business leaders themselves; or by both groups working together. They may involve making sure that the curriculum is rigorous and relevant, that the students are getting the in-class and extra-curricular activities necessary to build a solid resume of technical and employability skills, or that there is sufficient funding beyond the dollars available from the district to achieve the goals. They may set other goals which result in students who successfully aspire to attend college, pursue substantive careers and become active and productive citizens in the community.

Advisory board members can provide such services as classroom speaking, mentoring, job-shadowing, speaking at student conferences, fundraising, providing technical assistance to and professional development for educators and advocating on behalf of the school to the district, to the school board and to other members of the business community. The key with any of these activities is two-fold: first, to set goals and keep the business leaders on track to achieve those goals; and second, to connect the business leaders emotionally with the students.

Business leaders spend most of their days working to achieve goals. Business people are results-driven. They are very used to getting an assignment, determining what needs to be done, and then doing it. In business, the process by which the results are achieved is often

secondary to the actual achievement. Bonuses are typically not paid to business leaders for effort...only for results. So giving your advisory board members specific, measurable, attainable, realistic and timely (S.M.A.R.T.) goals is the first step to keeping them interested and engaged, and motivating them to engage more in the future.

The second key has to do with connecting them emotionally with your students. Business people may spend much of their work time at an emotional distance from others. While they often work in teams to increase productivity, they may receive little emotional payback. While a business person may get a feel-good “attaboy” from their boss, these occasions can be rare. To engage business leaders and sustain their active involvement with your school, you must create an environment that satisfies these kinds of emotional needs. This comes from working with your students: in the classroom, in a mentoring program, during a job-shadowing experience or during a student conference. You can help fill a business person’s “emotional bank account” by having them work with your students, and actually see and feel how their time and/or financial resources help those students succeed. To be sure, these kinds of emotional rewards are but one of a number of benefits business people can receive, but they are definitely among the more powerful and immediate.

The following list shows some of the ways business people can connect with students, and the time commitment generally associated with the activity:

Ways for business leaders and their employees to engage with students

(All time commitments are estimates. Time will vary based on personal availability, and the interest of employee to engage with students.)

1 - Classroom participation

1–2 times per semester, 1 hour each time

- Attend a course with which the business leader is familiar and comfortable, to support the curriculum and the teachers’ pedagogy with anecdotes and real-life experiences that bring the curriculum to life
- With the students, role play scenarios that simulate the workplace behavior relative to the curriculum being taught; i.e. help the students make the connection between the classroom and the business world
- Discuss the consequences of poor choices such as dropping out of high school, not getting some

amount of college education and/or making poor ethical decisions. Include real-life judgments from famous cases such as the Enron case

- Discuss the importance of a “clean or unqualified” opinion in audited financial statements, and the challenges a company faces (from creditors, investors, etc.) if the opinion is “qualified” or has an “exception”
- Discuss various professional careers and opportunities, qualifications/college required, earnings potential, travel, promotion, etc.

2 - Field trips

1-2 times during the school year for 2-4 hours each

- Bring students to the business person’s office locations and/or client locations; observe the way business people behave in an office setting
- Have students participate in a discussion with a client’s top management regarding ethical behavior in business, how they got into the business, their view of opportunities for the future
- Visit interesting sites in your community related to business, such as a historic building where a company started, a bank, a brokerage company, a manufacturing company, a service company, etc. Again, connect the classroom to the business application.

3 - Mentoring

1-2 hours per month

- Mentor 1-2 students, including meeting with them face-to-face once a month and/or exchanging e-mails more frequently. Suggested discussion topics could include career plans, college choices, homework issues, etc.
- Provide used clothing (or money for new clothing) so students have an outfit for a job interview, or internship interview
- Help develop the students’ soft skills including oral and written communication skills, presentation skills, resume writing skills, interviewing skills, dressing for success, comportment, creative thinking, problem-solving and other business behavior skills

4 - Job Shadowing

1-2 times during the school year for 3-4 hours each

- Invite students to travel to their offices, to follow or “shadow” employees in their normal daily routine, a couple of times during the school year, typically for 2-4 hours per visit

5 - Student Conference

1 time during the school year for 4-6 hours

- Speak at a day-long (or half-day) student

conference. You can hold the conference at the business person’s offices or in another meeting area. Topics could include items such as the soft skills mentioned above, as well as table manners, personal grooming, etc.

- Identify and recruit other speakers to tackle subjects the students need to hear, and which the business leader may be uncomfortable discussing due to a lack of expertise or personal experience with the topic

6- Advisory Board membership

1-2 hours per month

- Join the local Academy Advisory Board, and commit to attending meetings and helping steer the course for the success of the Academy students
- Serve as Officer, or as a Committee Chair (fundraising, internships, activities, recruitment, public relations, etc.)
- Provide or find expertise and annual services pro bono should the advisory board wish to go 501(c)3

7 - Paid Internships

6-10 weeks after the end of the students’ junior year (daily supervision/management required)

- Provide paid internship positions for students to give rising high school seniors a real sense of what the world of work is all about
- Provide funding for a paid internship position with a non-profit organization that is closer to the school, or more convenient for the student

8 - Advocate

- Be a spokesperson for the school in front of the Principal, the District Superintendent, the school board and the community at large (Chamber of Commerce, Kiwanis, Rotary, etc.)
- Encourage more participation by business members from the community

By setting SMART goals for business people and giving them the room to run, and by connecting them emotionally with the “end-users” of their investment of money and time, i.e. the students, you can motivate, stimulate and energize your business community to fully engage with your school, and be active participants in building today’s youth into tomorrow’s productive citizens and workforce.

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