

¡DESARROLLANDO CARÁCTER! PROGRESS REPORT AS OF APRIL 30, 2018
to Secretary Julie Keleher, Puerto Rico Department of Education
Submitted by Michael Josephson
President, Joseph & Edna Josephson Institute of Ethics, May 12, 2108

This report is submitted pursuant to the request of Secretary of Education, Julia Keleher, that JI provide the PRDOE with interim reports on implementation activities, baseline conditions and the impact of the Desarrollando Carácter program.

There are five parts to this report:

1. Background
2. Activities
3. Testimonials
4. Impact
5. Findings

Part One: Background

- **Selection.** In response to concern about the personal behavior and academic performance of Puerto students, the Puerto Rico Department of Education (PRDOE) determined to implement a system-wide values-based program focusing on the development of positive character traits and academic, social, emotional skills. The Josephson Institute of Ethics (JI), a nonprofit public benefit corporation, presented the PRDOE with a comprehensive proposal to design and implement a Spanish language program based upon the most current version of its CHARACTER COUNTS! program. Based on the Institute's unique experience to implement a program of this scope (including the widely acclaimed and documented success of the Tus Valores Cuentan program in about 500 Puerto Rican Schools in 2010-2012) and capacities (including an extensive array of effective proprietary strategies and resources), the PRDOE entered into a contract with JI to design and implement the ¡DESARROLLANDO CARÁCTER! initiative.
- **Formation of Contract Formation.** The contract was prepared, reviewed, and approved with the expectation that Services would begin in the first semester of

the 2017-2018 academic year and terminate on May 31, 2018.¹ The contract was presented to JI and executed on December 23, 2018. It was understood at the time by both parties that the termination date of the contract would have to be amended to allow JI to provide all the if all deliverables set forth in the contract² JI was urged to commence the program as soon as possible to assist administrators, teachers, students and parents deal with the anxiety, trauma, and physical damages caused by the storm, including massive population dislocation.³

- **Deliverables: Services to Be Rendered.** The contract specifies seven major components:⁴
1. **Project Presentation and Divulcation Conferences.** JI will deliver fourteen three-hour presentations to Superintendents and Academic Facilitators from the different subjects in seven designated regions of the island.
 2. **Champions Training Sessions.** JI will hire and train a sufficient number of Master Trainers (MTs) present as many three-day training sessions of 6 hours as required to train to at least 7,301 champions consisting of teachers, social workers, counselors and school directors.
 3. **Administrative Functions Training:** JI will conduct one six-hour session in each of seven regions each semester for school administrators responsible for implementation.
 4. **Parents Training Sessions:** During the contract JI will conduct at least 3 parents training sessions of 2 hours per school. If a specific school requires additional sessions, they will be provided as needed.
 5. **On-site support, coaching, mentoring:** Each of the 1,043 schools will receive ongoing support coaching and mentoring. MTs will visit each school at least 4 visits per semester.

¹ On August 3, 2017, PRDOE sought and received authorization to qualify the contract for federal funds. This authorization included detailed budgets and an extensive justification for the inclusion of resources deemed by JI to be essential and indispensable. This authorization represents a PRDOE decision to embed the costs of resources within the professional services contract.

² There was no need to amend other key provisions since under the contract JI could only invoice for services actually rendered. Both parties expected that JI would diligently attempt to deliver as many services as possible before the May 31, 2018 termination. The program would be completed during the term of the extension. Another envisioned amendment related to the workplan. The workplan prepared by the PRDOE that accompanied the contract reflected a budget prepared by JI prior to the decision by the PRDOE to re-format the contract. It listed all key deliverables separately, including teacher support and school climate resources deemed essential and indispensable in the August 3, 2017 authorization. This can and should be cured by an amendment.

³ The physical, emotional and economic impact of the hurricane was compounded by ongoing dislocation and emigration of Puerto-Rican families, including students, administrators and support staff and the anxiety and uncertainty resulting from a PRDOE policy to consolidate schools (requiring closing of more than 300 schools). JI devoted its full resources to adapt implementation strategies to the unsettled and changing context.

⁴With respect to each of these deliverables JI is responsible for all costs associated with the rental of venues, as well as acquisition of necessary audio/video equipment, computers and other tools for MTs, and all instructional support and school climate materials it deems necessary to the program.

6. **Support during school training sessions to the faculty:** Desarrollando Carácter MTs will provide two two-hour sessions of on-site support during the school training that will be conducted by the Champions to their staff.
 7. **Evaluation:** The program will receive a thorough and comprehensive evaluation involving students, parents, teachers and directors.
- **Puerto Rican Employees and Managers.** In order to assure effective implementation, JI has hired 99 experienced Puerto Rican educators and retained a local company, Camera Mundi, to provide specified management services to JI. JI selected Camera Mundi because of its stellar reputation as a provider of educational services in Puerto Rico.⁵
 - **PRDOE Added Schools.** The contract was budgeted and priced for 1,043 schools. After execution, the PRDOE requested that an additional 44 schools be added to the project at no additional cost. JI acquiesced to this request and expanded its responsibilities and services accordingly.
 - **Contractual & Payment Issues.** All the contract's terms were subjected to exhaustive review by PRDOE program and legal staff prior to execution by the Secretary of Education for the PRDOE and Michael Josephson for JI. JI has rigorously complied with its terms and, as this report demonstrates, delivered an enormous amount of outstanding and highly appreciated services under extremely difficult circumstances. No question has been raised about the quality or value of these services.

Nevertheless, based on what we believe are unfounded concerns raised by an Auxiliary Secretary for Federal Affairs⁶, the PRDOE has refused to release any of the allocated funds for the value of services rendered and received⁷ and as of May 14, 2018 has directed JI and all its employees to suspend and to cancel all activities under the contract until further notice.

JI has been informed that this suspension should not be interpreted as a cancellation of the project.

⁵ JI is well aware of the provision in the contract preventing it from employing sub-contractors and of its obligation to retain and exercise complete and sole control with respect to all aspects of the design and delivery of the program. Consequently, JI's and Camera Mundi's authority and duties are strictly defined to comply with this requirement.

⁶ This PRDOE staffer, has raised two major issues: 1) whether JI has sufficiently documented its relationship with Camera Mundi to demonstrate they are not a subcontractor, and 2) whether the contract which at the direction of the PRDOE embeds the cost of essential materials was properly drafted and whether a separate procurement process should have been used regarding these resources. JI has prepared and presented to the PRDOE full and complete responses to these concerns along with supporting documents.

⁷ JI has expended enormous sums and incurred substantial liabilities in reliance on the contract. Current approved invoices are approximately \$6 million.

Unless and until these issues are resolved to the satisfaction of the PRDOE no amendment to extend the contract past the May 31, 2018 termination has been discussed.

We are. Of course, very proud of the work already done, very confident that completion of the work will produce great benefits for Puerto Rican schools, children and parents and optimistic that the PRDOE will do what needs to be done to re0instate the program.

Part Two - Services Rendered from January 1 – April 30, 2018

¡DESARROLLANDO CARÁCTER! is very complex and sophisticated program not only tailored to the overall needs of the Puerto Rico school system, but tailored to allow individual response to the needs of each of the 1084 schools assigned to us. Thus, though there are natural sequential stages of implementation, each school will integrate the program at its own pace depending on physical conditions and administrative and faculty readiness. The ability and willingness of some schools to commence full integrated implementation of ¡DESARROLLANDO CARÁCTER! is affected by many factors including the school’s determination of the effect of the school closing and consolidation plan. Consequently, JI only invoices for services rendered.

Summary of Services⁸

Number of Schools	1,087 ⁹
Master Trainers and Coordinators	99
Certified School Champions	7,169
Certificated 3-day Champion Trainings	200
Hours of school-site coaching and assistance	7,023
Parent Workshops	392
School Launch Events	267
Compose, Print and E-Mail Newsletters to Champions	3
Divulcation sessions for educators	14
Integrated School Climate Resource Package (e.g., banners, street signs and posters)	1,087
Integrated Student Workbooks (¡Vamos por más!)	260,000

⁸ Some of these numbers may change slightly after JI completes a pre-invoice full and detailed verification process.

⁹ After execution of contract which designates 1,043 schools, the PRDOE requested that an additional 44 schools be added to the project at no additional cost. JI acquiesced to this request and expanded its responsibilities and services accordingly.

99 Master Trainers and Coordinators Hired and Trained. JI recruited, screened, hired and trained 93 Full-Time Master Trainer/Mentors (MTs) and Six Regional Coordinators. MTs are full-time employees responsible to conduct 3-day intensive trainings for school site ¡DESARROLLANDO CARÁCTER! “Champions”, present parent workshops, coordinate and oversee informational and other activities at each school, provide on-site ongoing assistance to school directors and teachers with regular visits to schools assigned to them. The selection and training process was intensive.

- JI recruited, hired and trained 93 Master Trainers (MTs) with a minimum of 7 full days of advanced training to enhance their ability to effectively present the CC! content to schools.
 - Only 70% of the more than 200 candidates who applied for the position were invited to participate in four separate three-day screening training sessions conducted by Michael Josephson and the Josephson Institute’s most senior trainers.
 - Only 93 were employed and given an additional four-day intensive training.
- In April, JI provided an additional full day of training to all MTs related to strategies to effectively support schools implementing the PBIS initiative.
- JI also provided supplemental full day of training sessions for MTs re: strategies that will be used in conducting parent trainings and another half-day training to PBIS providers and in May at the request of the PRDOE, MTs conducted another extensive training to PBIS providers.



7,169 Desarrollando Carácter Champions Trained and Certified. In an extraordinary logistical achievement, the Desarrollando Carácter Master Trainer/Mentors conducted

200 three-day certificated training sessions to serve as Site-Based Desarrollando Carácter Champions in seven cities: Arecibo, Bayamon, Caguas, Humacao, Mayaguez, Ponce, San Juan – 7,169 completed the program and have been certified.¹⁰

- Though many of those sent to the training by their school director knew nothing about the Desarrollando Carácter program and were unhappy about the assignment at first, over 90% rated the training as excellent and left the training as enthusiastic champions.



¹⁰ JI was scheduled to certify another 70 Champions in two trainings between May 14-May 31, 2018



14 Divulagation Sessions for Educational Administrators. JI has fully completed this aspect of the contract as MTs conducted 14 Informational meetings in seven locations describing the Desarrollando Carácter initiative to for 950 superintendents, auxiliary superintendents, academic facilitators, social work facilitators, professional counselors, liaisons and school directors.

7,023 Hours of On-Site Coaching-Support. A vital distinguishing characteristic of Desarrollando Carácter is the enormous amount of ongoing support provided each school. Since January, JI's MTs provided 7,023 hours of onsite mentoring and coaching in thousands of school visits.



267 School Site launch Events. MTs and Champions have conducted 267 school site launch events for students and staff.



392 Parent Workshops. Despite extremely difficult communication and travel challenges resulting from hurricane damage, JI's MTs were able to organize and complete nearly 400 parent workshops.



Newsletters. JI has prepared and distributed three full color newsletters with specific advice for implementation as well as success and best practices stories.

CONEXIONES DE CARÁCTER

ABRIL 2018

Cada mes durante el año escolar, a usted se le proveerá con estrategias para integrar Desarrollando Carácter en su escuela. De igual forma, presentaremos escuelas en nuestro ENFOQUE EN EL CARÁCTER destacando las experiencias de personalidades comprometidas con el carácter que demuestran la integración del programa en las escuelas a través de Puerto Rico.

Al empezar el 2018, CHARACTER COUNTS! comenzó una iniciativa (ambiciosa) para llevar **DESARROLLANDO CARÁCTER** a todas las escuelas públicas de Puerto Rico. La iniciativa impacta sobre 330,000 estudiantes y más de 24,000 educadores. Ya se han capacitado más de 7,500 directores y personal escolar en un **Taller para el desarrollo del estudiante** de 3 días de duración. Las escuelas reciben recursos para impartir una enseñanza del carácter efectiva. Se asignó un Master Trainer para servir de guía y brindar apoyo en la integración de **CHARACTER COUNTS!** a los programas académicos como apoyo a las escuelas. Todos están capacitados para promover una experiencia de desarrollo profesional efectiva y continua para nuestras escuelas.

El desarrollo profesional tradicional a menudo es ineficaz porque no apoya a los maestros durante la etapa más difícil de la curva de aprendizaje: la implementación. De la misma manera que correr bicicleta es más difícil que aprender a correrla, involucrar a los estudiantes con una estrategia instruccional en la clase, es más difícil que aprender sobre la estrategia en sí. Para poder cambiar verdaderamente las prácticas, el desarrollo profesional debe ocurrir a lo largo del tiempo y ser continuo. Las investigaciones demuestran que cuando el desarrollo profesional simplemente les describe una destreza a los maestros, sólo el 10% lo transmite a la práctica; sin embargo, cuando los maestros son entrenados a través del tiempo mediante la implementación, 95% típicamente transfiere la destreza.

Queremos generar cambios, tanto en términos de las creencias y los comportamientos de los estudiantes como en el ambiente escolar. Una escuela no se convierte en un lugar positivo para trabajar o aprender debido a los programas; tiene éxito debido a los maestros comprometidos, apasionados y entregados. Lo que hace **Desarrollando Carácter** único es el compromiso de proveer adiestramiento continuo, mentoría, asignación de recursos, evaluación y promoción. Trabajando juntos, podemos hacer una diferencia en la vida de los niños y jóvenes de Puerto Rico.

Estamos encantados de que esté comprometido con este esfuerzo y haremos todo lo posible para apoyar a su escuela en la promoción, defensa e implementación de **DESARROLLANDO CARÁCTER**.







Part Three: Testimonials of School Directors. Here is a sample of the comments of school directors after completing the training:

- [Original written in English] As our school already teaches the Six Pillars because we were trained with TVC, our team was afraid that this training would be a repeat of what we learned six years ago. What a difference. We thought TVC was a great experience but Desarrollando Carácter is even better. We can't wait to go back and share what we have learned.
- [Original written in English] Our school was a depressing place to learn and teach. Then, we were invited to participate with Tus Valores Cuentan, that program changed our school and even today we still implement it. The school has become a place where parents want to send their young people because it is a safe school. All a result of teaching the Six Pillars.
- Yo creo en este proyecto, creo que es la iniciativa más importante que tiene el departamento ahora mismo
- Le voy a confesar que vine contra mis deseos porque tengo demasiado trabajo, pero quiero pedir disculpas porque lo que estoy obteniendo aquí es invaluable para mí y mis estudiantes. Gracias”.
- Desarrollando el Carácter nos brinda la oportunidad de poner en perspectiva lo que hacemos siempre como educadores dentro y fuera de la sala de clases pero de forma estructurada, pensada y dirigida a obtener cambios positivos en la conducta de nuestros niños.
- Sé que esta iniciativa transforma pues participé de ella anteriormente y ahora es más completa.
- Que haya regresado esta iniciativa es excelente. Quiero implementarla lo antes posible. Nuestra escuela y nuestra comunidad necesitan esto.
- Nos hace falta el proyecto. Lo queremos revivir en toda la comunidad
- Nunca participé del proyecto pero estoy seguro de que va a cambiar vidas.
- Participamos del proyecto anterior y se notó la diferencia (por ejemplo, disminuyeron las peleas en el almuerzo). Ahora quiero hacer más.
- Puedo enviar a toda mi facultad a tomar el taller? No creo que tengan algo más importante que hacer que no sea trabajar con esto.
- Desarrollando Carácter es una iniciativa maravillosa porque puedo sacar lo mejor de mis estudiantes y del personal escolar. A través de la implementación espero que podamos impactar el clima escolar de manera positiva y dinámica.
- Me encanta esta iniciativa organizada y completa; proveen materiales, libros, manuales, *trainers* creativos y apasionados como ninguna otra. Espero lo mejor y me gusta que vamos a unir los padres, así impactamos los valores de toda la familia trayendo un cambio real a nuestro país”.

RESULTS OF INDIVIDUAL SCHOOL REPORTS

Jl directed its Master Trainers to visit each school and consult with the site ¡DESARROLLANDO CARÁCTER! Champions at that school to prepare a report seeking to assess nature and scope of the issues confronting the 1,084 schools assigned to us and the attitudes of teachers and parents towards and impact of the program to date.

IMPLEMENTATION OF ¡DESARROLLANDO CARÁCTER!. We asked MTs to tell us when did the school actually begin to implement ¡Desarrollando Carácter! based on when trained school Champions introduced program to entire faculty. As Indicated above, the school by school implementation of the program depends on many factors including the date their Champions were trained and the readiness of administrators and teachers to integrate the program into the school environment and into classes and other student activities. The MT survey revealed that 78% of the schools began implementation after March 16th.

Impact of Program so Far. MTs were asked to consult with the Champions at each school and determine whether their school had experienced any significant observable improvement in a wide range of outcomes. In each case, the vast majority said it was *too early to tell* but we found it remarkable that **even at this early stage a substantial number of schools reported meaningful improvement in a number of critical areas:**

- **39%** It has the **confidence and support of parents**
- **37%** It is already having a positive impact on **school climate**.
- **29%** It is already having a positive impact on **student conduct**.
- **26%** It has already improved **student engagement with their education**
- **24%** It has already helped students develop important **life skills**.
- **20%** It has helped students deal with **stress and trauma**.

In addition to these specific outcomes:

- **69%** said the program has already won the **confidence and support of teachers**.
- **68%** said the program **transcends politics and should be continued regardless of other policy issues**.
- **65%** said the program is **well-designed and will have a sustainable positive impact on school climate, student values and conduct**.

What are major Problems? In all our work with thousands of school systems, we have never found one that could benefit more from the school climate, life skill and character building strategies of CHARACTER COUNTS!/¡DESARROLLANDO CARÁCTER! than Puerto Rico Schools. Our interactions with Puerto Rico's educators and school visits revealed a large core of incredibly dedicated teachers and administrators passionate about improving the minds and lives of their students and administrators. This provides an ideal platform for the implementation of the ¡DESARROLLANDO CARÁCTER! comprehensive school and student development strategies. On the other hand, it is

undeniable that there are large segments of the school system beleaguered by a lack of resources, low morale and extremely high levels of anxiety resulting from educational reforms that will have major impact on schools, teachers, students and parents. In addition, it would be hard to overstate the depth and range of problems caused by damage caused by the recent hurricanes and the population dislocation.

- **Dislocation.** One result of our survey of attitudes and problems has been an increased focus on helping teachers, parents and students prepare to implement the Six Pillars of Character and demonstrate positivity and resilience as they face the impact of either moving to another school or receiving a large body of new students, teachers and parents in a school. We have developed coherent strategies that seem to be having a positive impact and we will continue to employ these strategies when the new semester begins.
- **Absenteeism and Tardiness.** The quality of education is dramatically affected by both teacher and student absenteeism and tardiness. Much of this is due to residual traffic and other travel obstacles that will, hopefully, be removed by the beginning of next semester. The fact remains, however, that between lost months of instruction and such absenteeism the quality of education suffered significantly in the first semester of the 2018-2019 academic year. JI will enhance its mentoring and support efforts to help compensate for these problems.
- **Parent Engagement.** Many teachers reported that a lack of parent engagement with the school and with their children's education is one of the most pressing problems facing their schools. JI has experienced this problem as well, as the attendance at parent workshops has fallen well below expectations. Some of this is due to transportation problems and economic stress resulting from the hurricanes but this only enhances the need to increase efforts to engage parents. The issue and problem will become more complicated as parents deal with the changing location and composition of students. JI will work with the schools to intensify efforts during the second semester of implementation to make parents feel welcome, to inform them of the important role they can play in the education of their children, and to provide them with invitations and opportunities for engagement. The fact that 39% of schools report that the program has already won the confidence and support of parents is encouraging.
- **Academic Performance and Student Engagement.** Many schools report serious concerns that students are not motivated to learn nor sufficiently engaged in their own education. This is a major focus of ¡DESARROLLANDO CARÁCTER! and MTs have and will continue to offer administrators and teachers tools and strategies to enhance student engagement and academic achievement. It is encouraging that 26% of the schools report early progress.
- **Student Conduct.** There is widespread concern with student conduct, especially concerning bullying, fighting and other forms of violence. This is a core element

of the ¡DESARROLLANDO CARÁCTER! initiative and 29% of the schools report progress in this areas after only a few weeks or months of implementation.