



# School Partner Onboarding Guide

Updated August 15, 2017



THE SCHOOL DISTRICT OF  
PHILADELPHIA

Office of Strategic Partnerships

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# School District of Philadelphia | Office of Strategic Partnerships

## SCHOOL PARTNER ONBOARDING GUIDE

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# Partnering with the School District of Philadelphia

## Thank you for your interest in supporting the School District of Philadelphia!

We all have a part to play in educating the children of Philadelphia. That's why we're so excited to share this resource guide to help potential partners from all over the city identify opportunities to serve our students and our schools, and to understand the guidelines and requirements in place to ensure the safety and protection of all our children and youth. This document is intended to guide potential partners through the processes associated with becoming an approved School Partner, and also to help these organizations find the best match for their strengths and the needs of schools and students.

## What are School Partners?

The School District of Philadelphia (District) defines School Partners as organizations that:

- ③ Exist as **formal entities**, which include nonprofit organizations, private corporations, and government agencies.
- ③ Are capable of providing **high-quality and ready-to-implement** programs or services within District school communities.
- ③ Can offer their programs or services **at no cost** to the District or its schools.

By contrast, School Partners DO NOT include:

- ③ Individual volunteers. If you are interested in volunteer opportunities, please visit the United Way's volunteer portal at <http://volunteer.unitedforimpact.org/>.
- ③ Organizations seeking funding from the District or wishing to charge schools or students for their programs or services.
- ③ Researchers not associated with School Partner programs or services. If you are interested in research opportunities, please visit the Office of Research and Evaluation's site at <https://www.philasd.org/research/>.

## What is the Office of Strategic Partnerships (OSP)?

The mission of the District's Office of Strategic Partnerships is to coordinate partner and volunteer resources to align them with the District's goals and priorities (as explained in Action Plan v3.0) to help create excellent schools.

### What we do:



We listen to schools and document their needs through our School Support Census



We help schools find partnership resources and build capacity



We serve as a liaison between external partners and the District

### Who we work with:



Schools



Partners



Internal District Offices

### Our core values:

*Collaboration* ▪ *Approachability* ▪ *Effectiveness* ▪ *Equity* ▪ *Teamwork*

# Aligning Partner Resources with District Priorities & School Needs

The primary objective of the District's current Action Plan is to align the work of all employees with four Anchor Goals.



## Anchor Goal 1

100% of students will graduate ready for college and career

## Anchor Goal 2

100% of eight year-olds will read on grade level

## Anchor Goal 3

100% of schools will have great teachers and principals

## Anchor Goal 4

100% of the funding we need for great schools, with zero deficit

The Office of Strategic Partnerships works to align partner resources to meet expressed school needs and support the District's Anchor Goals, particularly Goals 1 and 2, which focus on early literacy and college & career readiness.

## Partner-School Matching

The Office of Strategic Partnerships (OSP) works to align partner resources to meet expressed school needs and support the District's Anchor Goals, particularly Goals 1 and 2, which focus on early literacy and college and career readiness. To that end, **we encourage our new and existing partners to consider potential opportunities to more closely align their programs with the District's efforts to bolster early grade literacy and better prepare our students for college and careers.**

OSP also works closely with school communities to identify their key need areas, while tracking available partner resources citywide. Using this data, we:

1. help partners and schools develop relationships that they feel will best support their mutual goals, and
2. direct partner resources to serve our more under-resourced school communities.



# School Partner Onboarding Process

## *Interested in Becoming a New Partner?*

### Partner Inquiry

If you are NOT currently providing a program/service at the District school(s) and are interested in establishing a partnership:

- STEP 1:** Review the definition of Partner on page 1 of this guide to ensure you meet the criteria. If so...
- STEP 2:** Complete the Partner Inquiry: <http://bit.ly/2uqYKsQ>
- STEP 3:** An OSP staff member will be in touch with you to discuss next steps within 48 hours.

## *Currently Working in a School?*

### School Partner Agreement

If you are CURRENTLY providing a program/service at, or were recently matched with, a District school(s):

- STEP 1:** Review the [School Partner Agreement \(SPA\) Overview](#).
- STEP 2:** Complete the SPA.
- STEP 3:** Submit Partner **Staff Clearances**.

Partner staff, paid or unpaid, working directly with children must submit all of the following:

- [PA Child Abuse History Clearance](#)
- [PA State Criminal Record Check](#)
- [FBI Background Check with Fingerprinting](#)

- STEP 4:** Submit your **Certificate of Liability Insurance** and **Additional Insured Endorsement** (requirements detailed below and in the SPA).
- STEP 5:** If available, submit a **third-party evaluation** of your program. If you do not have a third party evaluation, submit your program's **theoretical framework/logic model**.

# Insurance Requirements

## Submitting Your Certificate of Liability Insurance and Additional Insured Endorsement:

School Partners must provide evidence of insurance coverage specified below. All insurance must be written on an “occurrence” basis and not a “claims-made” basis. The School Partner must: 1) name the District as an additional insured on the general liability insurance policy, and 2) the insurer must also endorse this policy in a separate document.

- a. **Commercial General Liability Insurance:** Limit of Liability: \$1 Million per occurrence combined single limit for bodily injury (including death) and property damage liability; \$1 Million personal and advertising injury; \$2 Million in the general aggregate and \$2 Million aggregate for products and completed operations.
- b. **Professional Liability Insurance:** Limit of Liability: \$1 Million with a deductible not to exceed \$100,000. School Partner may permit its insurer to write this coverage on a claims-made basis, provided that the School Partner shall maintain coverage for occurrences arising out of services provided under the School Partner Agreement for a period of at least 3 years after services are provided, or shall provide for an extended reporting period of at least 3 years after cancellation of the policy.
  - i. Educator’s Legal Liability Insurance: For School Partners in direct contact with students, coverage must include Educator’s Legal Liability coverage of \$1 Million per occurrence single limit, and \$2 Million general aggregate coverage.
- c. **Sexual Molestation Coverage:** Coverage for wrongful physical or sexual contact must be included in one of the three following policies: Commercial General Liability Insurance, Professional Liability Insurance, or Educator’s Legal Liability Insurance.
- d. **Workers' Compensation:**
  - i. Workers’ Compensation: limits shall be the statutory limits.
  - ii. Employers’ Liability Insurance Limit of Liability:
    - (1) \$100,000 Each Accident – Bodily Injury by Accident;
    - (2) \$100,000 Each Employee – Bodily Injury by Disease; and
    - (3) \$500,000 Policy Limit – Bodily Injury by Disease.
  - iii. If the contractor is exempted from Workers’ Compensation, please provide a statement as to why the exemption applies (e.g. owner of company with no employees and as owner waiving workers’ compensation).
- e. **Automobile Liability Insurance:** If School Partner will be using motor vehicles in connection with the Work, the limit of liability is \$1 Million per occurrence combined single limit for bodily injury (including death), and property damage liability arising from owned, non-owned, and hired vehicles.

## f. Two Required Documents to Submit:

### 1. Certificate of Insurance:

- In the "**Description of Operations**" section, it must be written that, "The School District of Philadelphia, its officers, employees and agents, shall be named as additional insured."
- The **NAIC** number(s) must be listed for each insurance company affording coverage.
- Please find a sample insurance certificate at the link below:

<https://www.philasd.org/strategicpartnerships/wp-content/uploads/sites/83/2017/07/certsample.pdf>

### 2. Additional Insured Endorsement:

- "The School District of Philadelphia, 440 N. Broad Street, Suite 325, Philadelphia, PA 19130" must be named as the Certificate Holder.
- The Certificate must have an original signature of the authorized representative. The Office of Risk Management will accept a computer generated signature but not a "stamped" or "typed" signature.
- The Cancellation Clause must read, "Should any of the above described policies be cancelled before the expiration date thereof, the insurance company will mail 30 days written notice to the certificate holder named to the left."
- Please find a "sample" Additional Insured Endorsement at the link below, which may differ depending on the type of form the insurance company uses:

<https://www.philasd.org/strategicpartnerships/wp-content/uploads/sites/83/2017/07/Sample-Additional-Insured-Endorsement.pdf>







# Establishing and Maintaining a Successful Partnership

Starting a successful partnership with a school requires thoughtful planning and coordination between the partner organization and school staff. To assist with this process, we strongly encourage all new and existing partners to review [Partnering for Success: A Practical Guide to Building Effective School-Based Partnerships](#), described below.

## The Partnership Guide

*Partnering for Success: A Practical Guide to Building Effective School-Based Partnerships* (“**Partnership Guide**”) offers research on best practices in partnership coordination and includes a toolkit that can be used to improve partnership coordination in any school. You can read the full report [here](#). We’ve also referenced relevant portions of the Partnership Guide below:

## Keys to ESTABLISHING a Successful Partnership

### 🔑 Clearly Communicate the Value of Your Services

- Explain your specific partnership services and potential value-added in ways that school staff can relate to
- Prepare and share materials that clearly describe the services and expected outcomes of your program
- Share examples of partnership successes

### 🔑 Ensure Partner-School Alignment

- Communicate your program goals
- Listen to the school’s goals and needs
- Determine whether your goals align with the school’s goals

### 🔑 Develop Goals for the Partnership

- Work with school leaders to identify specific partnership goals

### 🔑 Identify Your School-Based Liaison

- Work with school staff to determine your main point of contact at the school for communication/coordination around the partnership

## Keys to MAINTAINING a Successful Partnership

### 🔑 Communicate Often

- Partner and school staff communicate around partnership needs, goals, issues/concerns
- School and partner point of contacts/liaisons have been identified for the partnership

### 🔑 Set Clear Expectations

- Partner works with school to identify clear expectations of the:
  - Partner (e.g. performance targets, number of students served, timeline for implementation) and
  - School (e.g. access to space, teacher/school staff involvement, support with student recruitment)

### 🔑 Revisit Partner-School Alignment

- Partner and school check-in to ensure the partnership continues to support the school's needs and meet the partner's goals

### 🔑 Be Consistent

- Your program has an organized model and structure
- Program staff are dependable and well-trained
- You show up for each session, when planned and ON TIME

### 🔑 Use Available Resources

- Contact OSP if issues arise (on the partner or school end)
- Review ELEMENTS FOUR–SIX of the Partnerships Guide (for quick reference points, review pages 19–20, 23–24, and 25–26)

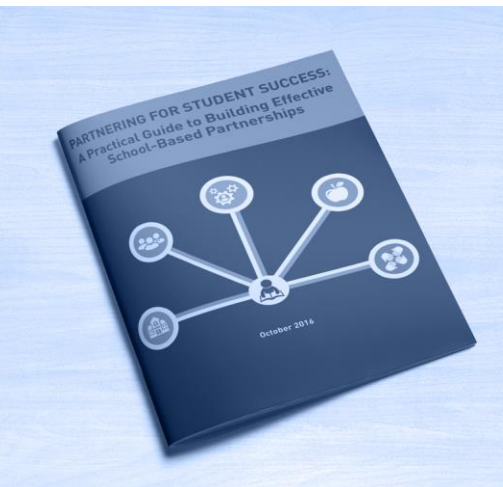


Photo (above, right) courtesy of The Chamber of Commerce for Greater Philadelphia.



# Forms and Policies

## Requesting Use of Facilities

In the 2017–2018 school year, the District's Office of Facilities will be rolling out a new system for receiving and processing requests to use spaces within District buildings. The new system will allow external users to register for an account in the system and input requests to use specific spaces in the building. Once submitted, those requests will then be reviewed by the principal. After the principal approves the request, the Office of Facilities will then make the final approval for requests. We encourage you to meet with the school principal prior to submitting a request to ensure that the principal is supportive of your request for particular spaces.

The new system should be available starting in September. Please, visit the [Office of Facilities](#) website for more information.

In order to submit a request, your program will need to provide a valid [certificate of insurance](#) and [additional insured endorsement](#). The District requires the actual Additional Insured Endorsement. This is a separate document that endorses the School District of Philadelphia as the Additional Insured on the General Liability policy. Your insurance agent/broker should know the document being referred to when the Additional Insured Endorsement is requested. Please ensure that your insurance certificate matches the following criteria:

- i. "The School District of Philadelphia, 440 N. Broad Street, Suite 325, Philadelphia, PA 19130" is listed as the certificate holder
- ii. This language is included in the "Description of Operations" section of the certificate: "The School District of Philadelphia, its officers, employees and agents, shall be named as additional insured per written contract."



## Becoming an Approved Field Trip Site

To have a site added to the monthly-updated list of approved field trips for District schools, please send your updated insurance certificate to Cheryl Rollins in the Office of Risk Management. Once you have the required insurances you can email it directly to Cheryl Rollins at [CRollins@avigrp.com](mailto:CRollins@avigrp.com). You do not need the same insurances for state and local facilities. If you have questions about these requirements please contact Ms. Rollins.

The requirements and instructions for submitting your documents are listed below:

- You do not need the same insurance for state and local facilities.
- All insurance must be written on an “occurrence” basis and not a “claims-made” basis.
  - **Occurrence** coverage is insurance that provides coverage for the act/accident when it occurs - regardless of when it is reported. For example, if you had coverage under an occurrence policy in 2000 and the claim is reported today (they just found the defect in the wall) then the claim is covered. On an occurrence policy, the trigger date is the date of the occurrence or accident. If that date is during the effective policy period, that policy applies.
  - **Claims-Made** policies provide coverage for claims made in the period the policy is in force. Claims made policies provide coverage only as long as the insured continues to pay premiums for the initial policy and any subsequent renewals. Once premiums stop the coverage stops for any claims not known or made to the insurance company during the coverage period. On a claims-made policy, the trigger date is the date the claim is made or the policyholder becomes aware of a claim being made.
- Workers’ Compensation and Employer’s Liability
  - Workers’ Compensation:
    - > Statutory Limits
  - Employers’ Liability:
    - > \$500,000 Each Accident – Bodily Injury by Accident;
    - > \$500,000 Each Employee – Bodily Injury by Disease; and
    - > \$500,000 Policy Limit – Bodily Injury by Disease
  - Other states insurance coverage and Pennsylvania endorsement
- Commercial General Liability Insurance
  - Limit of Liability:
    - > \$1,000,000 per occurrence combined single limit for bodily injury (including death) and property damage liability;
    - > \$1,000,000 personal and advertising injury;
    - > \$2,000,000 general aggregate; and
    - > \$2,000,000 aggregate for products and completed operations
- In the **"Description of Operations"** section, it must be written that, "The School District of Philadelphia, its officers, employees and agents, shall be named as additional insured."
- The **NAIC** number(s) must be listed for each insurance company affording coverage.
- The District requires the actual **Additional Insured Endorsement**. This is a separate document which endorses the School District of Philadelphia as the Additional Insured on the General Liability policy. The insurance agent/broker should know the document being referred to when the contractor requests the Additional Insured Endorsement.
- "The School District of Philadelphia, 440 N. Broad Street, **Suite 325**, Philadelphia, PA 19130" must be named as the Certificate Holder.
- The Certificate must have an original signature of the authorized representative.
- The Cancellation Clause needs to be amended to read, "Should any of the above described policies be cancelled before the expiration date thereof, the insurance company will mail 30 days written notice to the certificate holder named to the left."

## After School Meal Request

Partners offering after school programs can apply for meals through the District's [Office of Food Services](#). The application process can take up to four weeks, and includes completing the application, a training confirmation, and a roster of students (including student ID and first and last name). Please visit [the Food Services website](#) for additional details and program requirements. E-mail [foodsetup@philasd.org](mailto:foodsetup@philasd.org) or call 215-400-FOOD with any questions.

## Letters of Support

The Office of Grant Development can assist with grant applications by providing a Letter of Support. The forms needed can be found on [their website](#). The Grant Oversight Committee must approve your application; please note that they only meet every 2 weeks, and that you must have submitted your application by the Friday before each meeting to have your application reviewed.

## Donating to a School

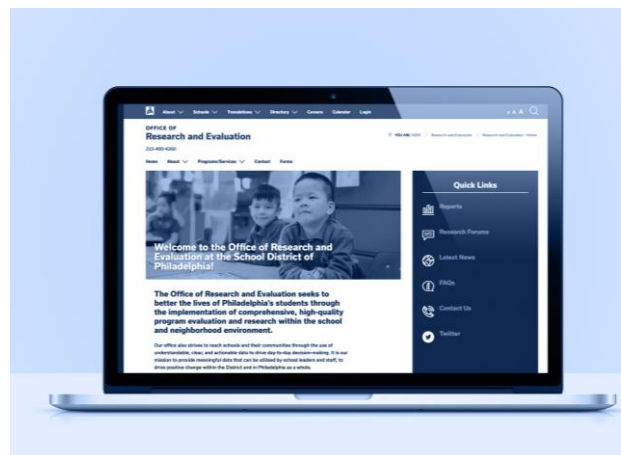
- If you would like to **donate monetarily**, please visit the Fund for the School District of Philadelphia's Donate Now page.
- If you have **materials** you would like to donate to schools, please reach out to Students Helping Students with specific information about your donation. Contact Bill Zandi at [bill@emailshs.org](mailto:bill@emailshs.org) and Mike Chawaga at [mike@emailshs.org](mailto:mike@emailshs.org).





# Student Data

- **Requests for Student-Level Data** – The District does not share student-level with external organizations unless: 1) an organization submits a data request for the purpose of research or evaluation, and 2) the organization’s data request is approved by the District’s Office of Research and Evaluation. School Partners seeking student-level data **for the purpose of research or evaluation** must complete the Office of Research and Evaluation’s Data Request
  - Form: <https://docs.google.com/forms/d/e/1FAIpQLSd-j9NfmNYjEA8ZEZjKi5basFizGYdPuBQKZRlxwdSSTfyPUw/viewform>
- **FERPA** - FERPA is a Federal law that establishes a right of privacy for student data, and prohibits the improper disclosure of personally identifiable student information derived from education records. Identifiable student data protected under FERPA includes, but is not limited to: grade and test score information, discipline reports, receipt of special education services or supplementary educational services, social security or public benefits, or information as to race, ethnicity or disability.
- **Directory Information** - FERPA permits schools to disclose Directory Information, which is defined as information contained in an education record of a student that would not generally be considered harmful or invasive if disclosed, unless parents or guardians have advised the District to the contrary by opting out in the “Release of Directory Information Opt-Out Form.”
  - Under District policy, Directory Information includes: the student's name, address, phone number; date and place of birth; field of study; participation in recognized activities and sports; height and weight, if member of athletic team; dates of attendance; grade level, degrees, honors, awards, photographs, rosters; previous school(s) attended; and primary language.
  - Directory Information may be made available to qualified outside organizations upon request. Qualified outside organizations include, but are not limited to, scholarship providers, trade/technical schools, and potential employers. In recognition of a family's right to privacy, it is the policy that Directory Information will not be provided to commercial enterprises.





# Corporate Partners/Days of Service

## Days of Service Planning and Preparation Timeline

Businesses and large organizations can provide much-needed support to schools, without operating a regular program or service in a school. Infrequent and one-time special events can serve to meet various types of needs, from rewarding student success and providing special incentives, to providing upgrade projects to school buildings and schoolyards.

The following timeline is intended to be a guideline for planning one-time “Day of Service” employee/volunteer events held at District schools. Preparation tasks and the timeline for planning will vary depending on the type of projects planned, number of volunteers involved, and other considerations. In planning projects, be mindful of scope (what can be accomplished with the number of volunteers, volunteer skill level, and resources available). Consider sustainability and whether projects might require ongoing maintenance or follow-up.

### At least 4–6 Weeks Before Event

- Reach out to District contact point for days of service: Micael Navarro López, <mailto:mnavarrolopez@philasd.org> or 215-400-5337
- Select members of your organization or group to serve as coordinators for different aspects of the day (e.g. registration, tools)
- Develop detailed plans for projects and preparation; consider scope and volunteer capacity\*
- Determine which prep tasks, if any, will require building access or involvement of the District’s Facilities staff
- Prepare and submit any required forms to the District

### 1–2 Weeks Before Event

- Develop a detailed schedule for prep and for the entire day of the event; be as specific as possible!
- Confirm plan for accessing the building during prep and on the day of the event
- Prepare communications to share with participants (information about day-of logistics, including parking, etc.)
- Inventory all materials (including tools and project materials, water/snacks for volunteers, etc.)
- Develop a plan for distribution and event day location of materials

## Day Before Event

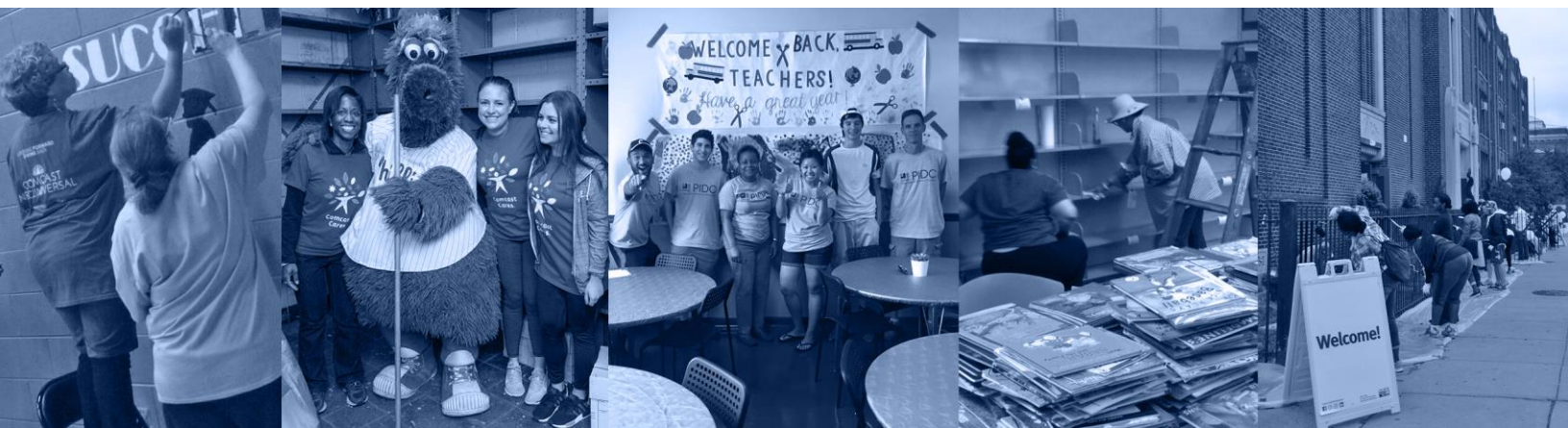
- Review detailed schedule for prep and event day with all relevant staff
- Complete prep (setting up projects, tools, space for registration, directional signs for volunteers, etc.)
- If projects involve painting, place tarp, secured with painter's tape, on the floors below painting area

## Day of Event

- Before volunteers arrive, circle with staff to review plan for the flow of the day; complete any remaining prep tasks
- Document the day: take pictures, especially of completed projects!
- After volunteers leave, circle with staff to give updates on project status, what projects/tasks remain to be completed, and plan for cleaning/collecting tools and materials from project areas

## Within 1 Week Post-Event

- Confirm plans for any projects that will require follow-up; communicate plan to relevant District staff
- Ensure any follow-up communications are sent; consider sharing pictures of the day and completed projects with participants and stakeholders
- Send thank you/wrap-up email to volunteers







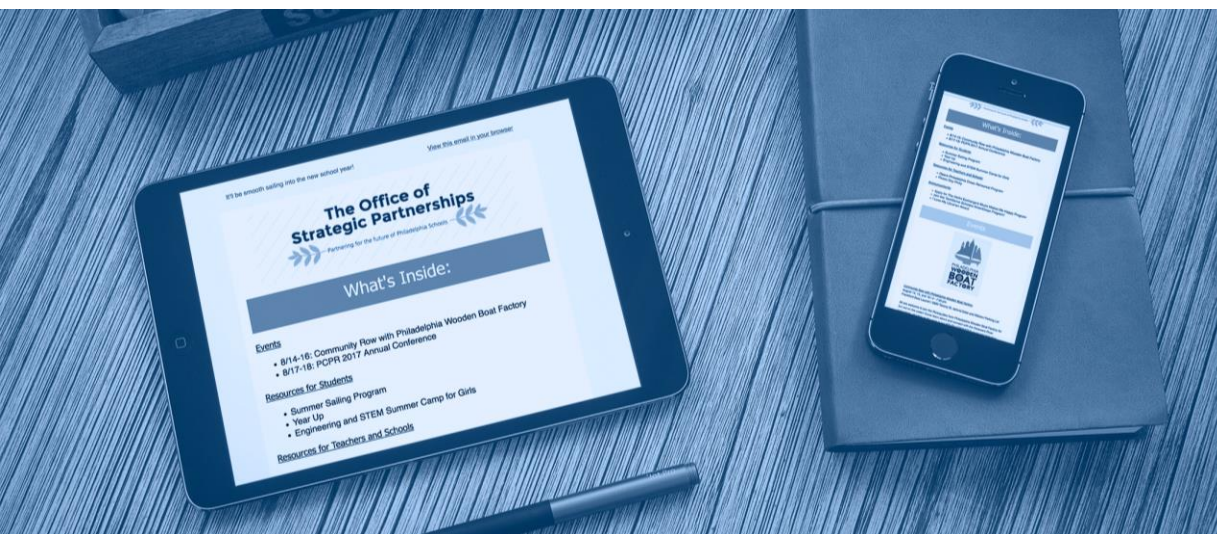
# Marketing Your Program/Service

OSP can advertise your **free** programs and events, announcements, etc. through our biweekly newsletter. This goes out to partners, teachers and District personnel, and other stakeholders every other Friday afternoon. OSP can also advertise any programs specifically targeting teachers or principals in the Principal and Teacher Information Boards, which are weekly newsletters sent to all principals and teachers at the District. Please note that we cannot advertise any opportunities that have associated costs.

In order to advertise your program, please send a two-to-five sentence blurb (including date, time, location, and a contact person) to our OSP VISTA for the 2017-18 school year, Albert Anaim [manaim@philasd.org](mailto:manaim@philasd.org), along with a photograph or logo that can be published in the newsletter. Principal and Teacher Information Board posts must be received on Monday at noon to go out that week, and newsletter posts must be received by the end of the Thursday before each newsletter's publication. Feel free to email Albert with any questions.

To view OSP's newsletter archives to get a sense of what and how we advertise, please visit [bit.ly/ospnewsarchives](http://bit.ly/ospnewsarchives).

We also encourage you to sign up for our newsletter at [bit.ly/ospnewsletter!!](http://bit.ly/ospnewsletter!!)



An example of our biweekly newsletter



## Helpful Links and FAQ's

### **School District of Philadelphia**

<https://www.philasd.org/>

### **Office of Strategic Partnerships**

<https://www.philasd.org/strategicpartnerships/>

### **The Fund for the School District of Philadelphia**

<http://thefundsdp.org/>

### **Office of Grant Development**

<https://www.philasd.org/grants/>

### **Office of Research and Evaluation**

<https://www.philasd.org/research/>

### **Limited Contract Agreements**

<http://philaosp.weebly.com/limited-contract-agreements.html>

### **FAQs**

For answers to additional frequently asked questions, please visit our website at:

<https://www.philasd.org/strategicpartnerships/about/faqs/>