A story from the field...

I had just begun my second year as principal when my whole staff participated in the PassageWorks training. At first many teachers were apprehensive about the training. It was the fear of the unknown or unfamiliar. During the two and a half days of training, the staff began to relate to one another on a different level. The conversations went from work related to really talking to each other about hobbies, families, etc. Barriers built from hard feelings and misinterpreted gestures started to crumble through the activities that we did during the training. One of the teachers actually told her adversary she admired her dedication to her students.

Once school began, I noticed the school year started very smoothly. It was as if we were a “family”. One of the new teachers to the building said, “I felt like I was a part of this staff from the beginning. The training helped me to get to know my colleagues as people.” This was one of the best things I have ever asked my staff to do. It brought us closer together as a team, which ultimately affects our relationships with the kids.

Donna Turnbo Smith, Principal, East Prairie Missouri School District

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Letter from the Board

Over these past six years, PassageWorks has built a track record in sustainable, system-wide change in public and private education, making significant progress towards our strategic goals and genuine transformation for our organization and its work. In every arena we have moved from the limitations common to many new non-profit organizations to the broader capacity possible when staff, faculty, volunteers and strategic partners become empowered to contribute their leadership and creativity.

We have changed our reporting cycle to coincide with the calendar year end (our fiscal year), and this report will therefore cover the past eighteen months since our last Annual Report. We are grateful for the rich, multi-faceted and productive period of growth PassageWorks has experienced since our last report. We have expanded our programs, products, services and reach tremendously. We have also adopted a new name, restructured our leadership and hired a new Executive Director. We are now working to incorporate learning from two successful Demonstration and Research Sites to refine our model so that we can broadly serve schools nationwide. We are at the end of the three-year cycle covered in our original 2005 business plan, and we want to update you on our progress and accomplishments in relationship to those original goals:

- Demonstration and Research
- Curriculum Development
- Faculty Development
- Outreach
- Development and Finance
- Infrastructure and Organization

Thank you for being a part of the PassageWorks support circle. We appreciate your partnership in the school reform movement—discovering new ways to effect significant, humanizing transformation of public schooling throughout the U.S.

David Brand
Chairman of the Board

“Bright, eager children come to the system hungering to be recognized and to belong. Their inner world is largely ignored in a system that trains them to perform, conform, and produce; and to retreat from their natural intuition, imagination, creativity, connection and hunger for meaning. As the inner life withers, so does love of learning, self-esteem, curiosity and meaningful relationships. Our work is to transform schools from within and without—to build into this archaic system a place for children to return to a natural state of connection to themselves and each other, to nature and the world.”

Erica Shafroth, PassageWorks Board Member
Message from the Founder

Dear Friends,

I believe we have reached a watershed moment in the history of the school reform movement. The opportunities for meaningful change in the way we educate our children are increasing exponentially. I have been moved over this last year and a half to see a growing awareness in the sectors of research, educational leadership and philanthropy that “reform” is not enough to address the critical needs of our 21st century schools.

Our team sees a new openness to models that are truly transformative. Instead of skepticism and resistance, we are witnessing growing interest in:

- nurturing and renewing teachers;
- “personalizing” schools so that classrooms and school culture move deliberately towards caring, respectful communities of learning and belonging;
- supporting students in their times of transition so the destabilizing force of change can empower them rather than lead to fragility and regression;
- developing tools for supporting focus, concentration, inner peace and interpersonal harmony in an era of overload, polarization, chaos and heightened anxiety;
- demonstrating through brain research the link between the emotional intelligence of students and teachers and achieving the core objectives of public schools;
- tapping into the reservoir of wisdom, creativity and leadership in our youth in order to revitalize communities across generations.

We are seeing genuine transformation in the students and educators we have been working with during this period. Teachers say that PassageWorks not only prepared them to be effective advisors, but also helped them develop as parents, spouses, artists and coaches. Students who had been demeaned, stifled, or alienated, now describe belonging, hope, and discovery of friendship with people they would never have discovered without the PassageWorks programs. These powerful stories of individual and systemic change continue to inform and inspire our work at the Institute as you will see in this report.

Rachael Kessler
Founder and President
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Seven Gateways

Each of the Seven Gateways of the PassageWorks model, describes students’ experiences of deep connection with themselves and the world. Together these gateways offer both a language and a framework for developing practical teaching strategies. © The Soul of Education ASCD 2000

Strategic Goals from 2005 Business Plan

• PassageWorks will establish a Demonstration and Research pilot project designed to build a flagship school district and to generate data on the impact of the PassageWorks model on educational outcomes important to school decision makers, such as academic improvement and school safety; and to measure the impact of its model on the development of students' and teachers' inner lives.

  See Demonstration and Research page 5

• PassageWorks will complete the development of curricula and other materials in order to effectively and efficiently infuse and deliver its model into educational systems.

  See Curriculum Development page 13

• PassageWorks will build capacity by training a core faculty and coaching staff.

  See Faculty Development page 19

• PassageWorks will continue to add to the body of knowledge available to the education community and the public regarding appropriate strategies for integrating the inner lives of students into teaching and learning and will continue to influence the national dialogue regarding this dimension of education.

  See Outreach page 23

• PassageWorks will develop the financial and infrastructure resources necessary to meet the above goals.

  See Our Organization & Financial Summary pages 27-31
2006-2007 Highlights

Highlights and brief summaries of our accomplishments since our last report.

Our New Name — PassageWorks Institute

In May, 2007, we officially changed our name from the PassageWays Institute to the PassageWorks Institute (PWI) after we learned that another educational enterprise had trademarked PassageWays. Several groups were convened, including experienced marketing and branding experts, and “PassageWorks” emerged as the favored new name. As our former Associate Director Diana Yourell said, “The name PassageWorks provides continuity with our previous branding, preserving the emphasis on supporting critical transitions in the life cycle of schooling.” Our marketing consultants commented that ‘passage work’ conveys strength and action, and evokes the concept of ‘the work’ or ‘the great work’ which many leaders in cultural transformation and environmental sustainability are using to capture the essential, ennobling and concerted efforts called for today for personal and global healing.

A New Executive Director

We completed our search in December and hired Mark Wilding as the new Executive Director of PassageWorks. Formerly Founder and Director of the Marpa Center for Business and Economics at Naropa University, Mr. Wilding officially began working at PassageWorks on January 1st 2008. At the Marpa Center, Mark was responsible for strategic planning, program development, marketing, and fundraising. In addition to his administrative duties, he also taught graduate courses in leadership and systems thinking at Naropa. Mark joined Naropa in 1994, and held several roles at the university including Director of Advancement, Administrative Director of Environmental Studies, and Human Resources and Systems Officer. Mark helped found a public computer software company in 1985 where he served on the board and in several roles until he left as President in 1993. Mark served as the Vice President of the board of CORE Colorado’s Education Fund for Corporate Social Responsibility.

“I am delighted to find in Mark a true partner who will bring his leadership to PassageWorks at a pivotal moment. Mark shares PassageWork’s deep commitment to bringing transformative education from the margins to the mainstream. He will help lead the organization through this period of growth as we build our capacity at every level, while also managing the administrative, marketing and resource development needs of that expansion.”

Rachael Kessler, PassageWorks President
In her full-time role as President of the Institute, our Founder, Rachael Kessler, will work closely with Mark and will continue to provide leadership in visioning, strategic planning, curriculum, faculty development, and field building in transformational education. She will continue to open doors for PassageWorks’ service in the world through her writing and speaking, and by cultivating and sustaining inspired relationships with strategic allies (see Our Organization p. 27).

**Poudre High School Demonstration & Research Site**

We are now in the midst of the fourth year of our Demonstration and Research Site at PHS—serving 1200 students per year with three unique curricula: Journey Into High School, Senior Passages, and Newcomer Transition program for recently immigrated students. Initial results of surveys, interviews and focus groups indicate genuine progress towards our goal of developing an advisory program that supports the inner life and resilience of students in critical transition years. We are partnering with PHS to support systems for in-house sustainability of the PassageWorks model in their school. “Engaging in this project with PHS has taught us a great deal about the scope of the implementation and the change process, which has fed directly into our future plans for working with other schools and districts,” commented Laura Weaver, PWI Associate Program Director (see Demonstration and Research p. 5).

**Missouri Demonstration Site**

Initiated by Paul Katnick, (Director of the Leadership Academy for Missouri’s Department of Elementary and Secondary Education) and implemented by two principals in East Prairie, our Missouri Demonstration and Research Site is in its second year of serving 650 students per year pre-K through grade six in this small, rural town. The entire faculty of over 60 teachers have been trained in our model and have implemented our core practices school-wide, creating a significant shift in school culture. In addition, Martin Elementary purchased and implemented our Making Healthy Transitions out of Elementary School curriculum for their 6th grade and created a unique anti-bullying program with our model. In the fall of 2007 Doyle Elementary began piloting our new Kindergarten First Steps curriculum (see Demonstration and Research p. 5).
Curriculum Development

As of the end of 2007, we have completed comprehensive curricula for nearly every transition year of K-12 education:

- Kindergarten First Steps
- Making Healthy Transitions out of Elementary School
- Entering the Culture of Middle School
- Journey Into High School
- Senior Passages

Additionally, we have finished a year-long Newcomer Transition curriculum, serving recently immigrated adolescents, and we have begun development of a Journey Beyond Middle School curriculum, which is currently being implemented in three sections of an 8th grade Language Arts class in Colorado. Our focus on curriculum development greatly enhances our ability to provide systematic, comprehensive and replicable material to uniquely serve students of all ages who are undergoing significant transitions (see Curriculum Development p. 13).

Digital Library

Funded by a generous grant from a new donor, PWI has initiated a project to create a digital media library with recordings of PWI faculty, students, teachers, parents and youth development professionals impacted by our work. The early results are rich and exciting. The recordings include moving testimonials and video of teachers empowered to bring new wisdom, skill and innovation into their classrooms. This diverse and powerful collection of media will serve many purposes, including teacher and PWI faculty training, curriculum support, marketing, fundraising and outreach.

Research and Evaluation

An independent research team completed the evaluation of Year One of our Poudre High School Demonstration Site. A research team is in the midst of analyzing data from Year Two and we are continuing to gather data for Year Three. The data from the Missouri project will be analyzed by Paul Kitnick in the coming year. Initial results gathered from our demonstrations sites (through surveys, focus groups, inter-

“Schools characterized by high relational trust are more likely to have educators who experiment with innovative teaching practices and reach out to parents. These practices result in marked improvements in student learning. School-wide relational trust also influences whether students regularly attend school and put forth high effort when faced with difficult tasks.”

Bryk & Schneider 1

A new level of trust and belonging is emerging for our students in their classrooms.

Principal, East Prairie Missouri Demonstration Site

5th grade student from video interview

views and reflections) have been very positive, with teachers reporting greater capacity to create a safe community and to sustain positive relationships with students and other colleagues. As Sandra Lundt, principal of PHS, said about her staff after a PWI training, “It has been wonderful to watch the collegiality of the teachers. After the training, they see one another in a totally different light and have shared deep parts of themselves — their joy, pain, sorrow and excitement.” We anticipate the release of a research report on our demonstration sites in 2009 (see Demonstration and Research p. 5).

Pre-Service

PWI has been exploring with Colorado State University (CSU) how to best infuse our core practices and principles into a variety of pre-service programs for preparing educators. Moving into the realm of teacher and principal preparation will allow us to affect change at another systems-wide level, further extending the reach of our model (see Faculty Development p. 19).

PassageWorks Strategic Plan

We are proud that we accomplished our core goals from our 2005 Business Plan (see page vi). In 2007 we met with our board and staff to review and refine our mission and vision and to discuss the next steps for growth and expansion in 2007-2009. As a result, we have sharpened our focus on the critical transition years in the lives of students. After a comprehensive strategic planning process, we developed a set of 2007-2009 Strategic Goals (see p. 30).

Financial Sustainability

Over the past two fiscal years, PassageWorks has exceeded its goals for funding and spent less than its budgeted expenses. This has enabled PWI to not only fulfill its programmatic goals and objectives but also fund a significant financial reserve for unforeseen challenges in the future. We have engaged and loyal donors, many of whom are making multiple year commitments to the Institute, while we continue to develop new connections with individuals and organizations who are inspired to join the PWI team (see Financial Summary p. 31 and Thank You on p. 33).
Demonstration and Research

...We are now working to integrate the learning from two successful Demonstration and Research Sites serving close to 200 educators and over 5,000 students...

Since our inception in 2001, the PassageWorks Institute has been committed to establishing Demonstration and Research Sites for the PassageWorks Model within public school districts. We are now working to integrate the learning from two successful Demonstration and Research Sites serving close to 200 educators and over 5,000 students at Poudre High School in Colorado and East Prairie School District in Missouri. We are preparing to initiate new urban pilot sites and to refine our model at every level so that we can broadly serve public schools nationwide.

Poudre High School

In 2005 we launched a multi-year Demonstration and Research Project at Poudre High School (PHS), a large diverse public high school in Northern Colorado. Based on the successes of the PassageWorks 10th Grade advisory curriculum (piloted for 600 students) and the Newcomers Transition curriculum (delivered to 50 students) in the 2005-2006 school year, PHS chose to expand its use of the PassageWorks Model to the entire 10th-12th Grade AIM program in the 2006-2007 school year.1

Year One Outcomes (2005-2006)

Teachers Reported Experiencing:

• a greater ability to connect with students
• an increased capacity to provide opportunities for students to appreciate their peers

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1. Note: AIM is an acronym at PHS for Advisory in Mentoring and refers to the advisory program that implements the PassageWorks curriculum and training
Year Two at PHS (2006-2007)

In Year Two Poudre High School provided PWI with a wonderful and challenging opportunity to quickly grow and expand our curricula and training. The rapid expansion stretched the capacity of our small organization and pushed us into a rich phase of program development.

During Year Two the PassageWorks Institute:

- expanded our involvement at PHS from two curricula, 650 students and 40 teachers in Year One to four curricula, 1,800 students and 100 teachers;
- engaged in an accelerated process of expanding and upgrading our training and mentor corps with the guidance of Karla Reiss, a nationally recognized author on educational coaching;
- conducted a two-day initial training, a one day follow-up training and on-going support trainings, specifically designed for each grade level cohort (10th, 11th, 12th);
- hosted a “Critical Friends Protocols” training for teacher-leaders facilitated by Daniel Baron and Marjorie Larner, strategic partners from the National School Reform Faculty;
- provided extensive distance and on-site mentoring to the three teacher cohorts;
- created a web-based mentoring system that allowed us to organize data, create reports and index and share teacher stories;
- met regularly with PHS leadership to refine and troubleshoot the program;
- convened teacher and student focus groups;
- administered teacher and student surveys;
- completed extensive new curriculum writing and revising;
- gathered video footage of PHS teachers and students, including a PWI Advisory classroom in session.

Trends in successful PHS PassageWorks Advisory classes

- Teachers shared appropriate personal stories
- Teachers were responsive, creative and flexible—taking advantage of “teachable moments”
- Teachers personalized the curriculum, finding ways to make the themes relevant to students in the moment without abandoning the themes, lesson plan, objectives or intent of the program
- Classes actively drew upon positive student leaders who modeled engagement
- Teachers were comfortable setting boundaries and successfully steered the class away from cross-talk and debate

Lorri Fowler, PHS Teacher & Former Site Coordinator for PassageWorks-AIM program

- a greater level of comfort amongst students in expressing compassion and practicing tolerance in their classrooms
- greater collegiality within their school community
We live in a world now where we can’t just rely on the fact that we’re the mighty U.S. anymore. There are people all over the world who are going to challenge these students for jobs, and it’s a lot different than it was 10 or 15 years ago...

So they need to look internally at themselves and become critical thinkers and problem solvers and communicators and be able to work with people who are different than them. I think that’s what this PassageWorks/AIM curriculum gives them.

PHS Senior Advisory Teacher

Sustainability at PHS

Since the beginning of the Demonstration and Research Project at PHS, long-term sustainability has been a critical goal. We envisioned a progression toward self-sufficiency, where PassageWorks staff would be intensely involved in the early stages of the project through the mentoring and training of faculty, and then slowly pass this leadership, ownership and responsibility back to PHS as they were ready. To this end, the following steps were taken in 2007:

- PHS convened two teacher curriculum advisory committees, who brought their creativity and experience to the table, providing PWI with rich and multi-faceted suggestions for revisions and curriculum extensions. This collaboration led to the stronger versions of these curricula that now include more options for activities and in-depth charts, which detail the objectives of each unit, the challenges common to this phase of group development, and our recommended solutions.
- PHS invited a group of lead teachers to facilitate their all-faculty advisory refresher training. PWI leadership helped design this training so that it would meet the changing needs of the PHS faculty cohort. The training was a success—teachers and leaders reported increased faculty excitement and “buy-in” as they are now learning from their peers.
- Since August 2007, PWI has consulted to the PHS project, while the core support has come from seasoned teachers and administrators within PHS.
- PHS recognized the value of PWI curriculum, and extended the advisory period from 45 minutes to one hour, which has allowed for greater depth in the lessons.

Signs of Success: Comments from Students & Teachers

“The whole class, every single student, was really present. They sat in the circle really listening to each other. They are beginning to really care about each other, even with their differences. They are respecting each other. A group of twenty-five 10th graders, from such different social groups sitting together at 8:20 in the morning really being present and listening to each other. That is powerful.”

PHS Sophomore Advisory Teacher
One thing that really surprised me about PassageWorks was how close I got to the people in my class. My freshman and sophomore year, my father was in Iraq and it was a really hard time for me, because it was just me and my mom and my three younger siblings at home. PassageWorks changed the way I thought about that role because it made me realize that the hardships that were happening in my life were definitely happening to other people in high school.

And I understood that there are so many other people in school that can relate to you and can relate to the problems that you have. So you should never feel alone and you should always know that you can overcome the hardships in your life — you can overcome the adversity and you can be who you want to be and you can be a happy person.

Poudre High School Senior, Colorado

The principles and practices in PassageWorks are not just applicable to teaching, but they apply in all areas of life. PassageWorks has relevance to me as a parent, a friend, a wife, a daughter, as a human being: and as a teacher as well.

Lorri Fowler, PHS Former Site Coordinator for PassageWorks-AIM program

“I just love seeing them take the ball and run with it! They share so well. I love that some leader kid will notice the quiet one and ask them to share their opinions with the group. It’s great group dynamics!”

PHS Senior Advisory Teacher

“They had a sense of pride when they were stating their opinions about the wisdom they have as seniors. I told them as a group that they have amassed a great deal of knowledge at Poudre High School. Part of transitioning somewhere else is being aware of your legacy that you are leaving behind.”

PHS Senior Advisory Teacher describing “Senior Wisdom” lesson

“We talked a bit about racial tension here at school, and one of my students who is usually silent really opened up and let the class know about what kinds of prejudices he faces on a daily basis.”

PHS 10th Advisory Teacher describing “Appreciating Diversity” lesson

“At the beginning of the class period I told Tony how much I appreciate him. I told him he is a kind and caring guy and that every time I think of him or see him in the hall I think about what a neat person he is. At the end of the period he gave me a “high ten”, but then really held onto my hands for a long time. He told me his grades are going up and that he is really happy. He is a kid that tugs at my heart.”

PHS Sophomore Advisory Teacher

“Their principles and practices in PassageWorks are not just applicable to teaching, but they apply in all areas of life... PassageWorks has relevance to me as a parent, a friend, a wife, a daughter, as a human being: and as a teacher as well.

Lorri Fowler, PHS Former Site Coordinator for PassageWorks-AIM program
I was really excited because one of my students said that he was upset because our AIM/PassageWorks class was shorter than our other classes and he thought it should be the same length. Other students then chimed in and said they felt the same way. This showed me that they really appreciate this class. We are having a blast so far this year!

**PHS Sophomore Advisory Teacher**

“One of my mother’s words of wisdom always was that our riches are in our relationships. This work certainly is about developing relationships. High school is a huge place and it’s a difficult place. It’s the best of times and the worst of times for a kid. It’s so important that every single child that comes through the doors at Poudre High School feels good about being here. They deserve to feel respected, they deserve to be safe, they deserve to be given a good education. And they deserve to be well-prepared to enter the real world after Poudre High School...whatever it is that they might encounter. I feel that PassageWorks is truly a key piece on how to get there.”

**Sandra Lundt, Poudre High School Principal**

A March 2007 report from the National High School Center included the following from High School researchers:

“Because the research is clear that the first year of high school is pivotal, but the transition into high school is often characterized as a time when students experience a decline in grades and attendance, school systems must support first-year high school students to improve their chances of success.”

In 2006 Paul Katnick, an executive in the Missouri State Department of Education, initiated a partnership with PWI and two high-risk rural elementary schools in the East Prairie School District to implement the PassageWorks approach for creating a caring compassionate culture among faculty and in classrooms. This project, fully funded and researched by the Missouri Department of Education, allows PWI to:

- Expand the focus of our Demonstration and Research goals to include the impact of our model on elementary as well as secondary schools, and
- Test our model in a poor, rural setting.

This invitation to launch this new Demonstration and Research Site was an unexpected opportunity with exciting results. The project was originally designed as a research study on the spiritual dimension of leadership. The initial PWI commitment was to provide mentoring for two elementary school principals throughout the year and to bring our Soul of Education Foundation Course to all 60 teachers at these two schools that serve the entire PreK to 6th grade population in this small, rural community. The two principals embraced this approach with passion and total commitment. The strengthening of their own partnership through the experience of the training allowed them to support each other in new initiatives resulting from this work. They were able to garner the commitment of their teachers to integrate PassageWorks principles and practices into their classrooms, to provide ongoing professional development based on our practices during staff meetings, and to initiate several new ways to expand the work at the state level.

**East Prairie Project Outcomes**

- Donna Smith, principal of the school that serves children in grades three through six, addressed an urgent need in her school community by creating a pilot program which used the PWI Model to address and prevent bullying. With consulting support from Rachael Kessler, Donna created the program and co-taught one group of each of the three grade levels — a remarkably generous commitment of time for a school principal. Groups integrated students who are chronically in the role of bully or victim, along with some resourceful, constructive students and some students who were more neutral. Mellisa Heath, principal of the pre-K-2

We are closer and the students try harder — they have more confidence... I see the students being helpful to each other and caring more for each other's feelings.

*East Prairie Teacher*

PassageWorks was an essential part of me becoming a member of Doyle from the get-go. I hadn't even spent a day teaching with this staff, and already, I felt like a member of the Doyle family. I couldn't have done that without PassageWorks. It was a great “ice-breaker” for me as a new teacher.

I think that schools should have this kind of thing more often. I am very thankful to have a principal who cares enough to implement such a program in our school.

*New Second Grade Teacher, Doyle Elementary School, East Prairie, Mo.*
school, partnered with Donna in teaching the youngest group of children, recent graduates of her school, further deepening the collaboration between the elementary schools.

- Martin Elementary purchased the Making Healthy Transitions Out of Elementary School PWI curriculum for implementation with the entire 6th grade. Both principals and a counselor partnered with teachers to provide three sections of this program. Commenting on the overall impact of PWI in her school, Principal Smith wrote, “a new level of trust and belonging is emerging for our students in their classrooms.”
- Mellisa Heath instituted a “golden moment” of silence for the whole school each Monday morning.
- Mellisa and Donna presented on the PassageWorks Model at the annual conference for the Missouri Association of Elementary School Principals, and each wrote articles about their experiences for The Elementary Principal — the official publication of the Association.
- As the new president of the South East Region of this Association, Mellisa integrated PWI practices into each meeting.
- Mellisa committed to guide the piloting our new Kindergarten curriculum in four classes in the 2007-2008 school year.
- Both principals began pursuing certification to become PassageWorks trainers, which will support program sustainability in their schools, serve the PWI need for leadership level trainers, and prepare them as potential trainers with a regional focus.

Social and Emotional Learning

Many educators are turning to the field of social and emotional learning (SEL) to help students build the cognitive, emotional, and behavioral skills they need to make healthy choices and succeed in academics as well as other aspects of their lives.

The Collaborative for Academic, Social, and Emotional Learning (CASEL) is an international group of researchers and practitioners working to establish SEL as an integral part of education from preschool through high school. The organization has compiled a strong base of scientific evidence that links SEL to children's academic achievement.

What is SEL? Social and emotional learning (SEL) refers to knowledge, habits, skills, and ideals that enable students to recognize and manage their emotions, develop caring and concern for others, make responsible decisions, establish and maintain positive relationships, and handle challenging situations effectively.

Research by CASEL documents the beneficial effects of SEL on children's health and well-being. Among the impacts are:

- Reduced violent and antisocial behavior
- Reduced drug and alcohol use
- Improved social skills
- Better impulse control
- Better conflict resolution skills
- Reduced school misbehavior

1. From CASEL www.casel.org: Presentations at the August 2002 National Technical Assistance Meeting in Washington, DC
New School Sites

Over the last year PassageWorks has been approached by numerous schools interested in our programs. While we seek to be responsive to such requests, in the coming year our primary goals are to both professionalize our faculty and curricula and to institute an urban pilot. We plan to systematically market our products and services once we have competed these goals.

Below we have noted some new schools that we are currently engaged in supporting.

Waldorf Schools: We’ve been working since last spring with two flagship Waldorf schools that have embraced our program with great enthusiasm and commitment and are now implementing our work in the 2007-2008 school year. Shining Mountain Waldorf School sent their entire faculty to the Foundation Course and are currently implementing the 5th, 6th, and 10th grade curriculum. The Sacramento Waldorf School has purchased the 10th grade curriculum and sent six teachers from multiple grade levels to the Foundation Course for training.

Jefferson County Open School (a public focus school in Colorado) invited a full faculty training in August 2007 and purchased the 6th, 10th and 12th curricula. Evaluations from leadership and faculty were extremely positive.

“The offering a two-day Passage Works workshop to our entire staff was a truly healing and renewing event – the Open School faculty was given the gift of exploring new and meaningful ways to bring passion and presence to our teaching. And in the process of experiencing together the fullness of the curriculum, we also discovered a new level of community with each other.”

Scott Bain, Teacher, Advisor, and Instructional Coach, Jefferson County Open School

PassageWorks Schools in 2006-07

- Boulder School of Integrated Studies: Boulder, CO
- Bear Creek Elementary: Boulder, CO
- Platt Choice: Boulder, CO
- Friends School: Boulder, CO
- Jeffco Open School: Aurora, CO
- Poudre High School, Fort Collins CO
- Shining Mountain Waldorf School Boulder, CO
- Oakwood School, CA
- Wildwood School, CA
- Sacramento Waldorf School, Sacramento, CA
- St. Paul Academy, St. Paul, MN
- Talmud Torah School, MN
- Twin Cities Jewish Middle School, MN
- Maui Prep School, Maui, HI
- Maimonides Jewish Day School, MA
- R. A. Doyle and Martin Elementary Schools, MO
- Hillel Community Day School, FL
- Northfield Mount Hermon School, MA
- Shoreline High School, WA
- Lexington High School, Lexington, NE
- 7th & 8th Grade Girls Empowerment Ho, Ghana

We’re grateful for the fine materials you have put together. We used your “Journey Into High School,” curriculum guide wholly this year and found it versatile and valuable. Now that most of our faculty have gone through the PassageWorks Foundation Course, we are in a much better position to implement a sequential and programmatic approach to social and emotional learning.

Thom Schaefer, Pedagogical Dean of Faculty, Shining Mountain Waldorf School
Curriculum Development

...PassageWorks has been a pioneer in recognizing and responding to a need now demonstrated in a growing body of research to support students during critical transition years as an essential component of their resilience and future success...

Curriculum development that supports the inner life of students continues to be the major focus of our work at PWI. PassageWorks has been a pioneer in recognizing and responding to a need now demonstrated in a growing body of research to support students during critical transition years as an essential component of their resilience and future success. As of the beginning of 2008, we are close to completing the development of programs for each transition in the Kindergarten through high school cycle of schooling: the transitions into and out of elementary, middle and high schools and a curriculum for “Newcomer” adolescents who are making the shift to the United States from another culture, country and language.

The Seven Gateways

- The yearning for deep connection
- The longing for silence and solitude
- The search for meaning and purpose
- The hunger for joy and delight
- The creative drive
- The urge for transcendence
- The need for initiation

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“Emotions drive attention which drives learning, memory, and just about everything else.”

“After listening for many years to student's stories, questions, and wisdom, I began to see a pattern. Certain experiences—quite apart from religious belief or affiliation—had a powerful effect in nourishing the inner life of young people. As the pattern became clearer, a map emerged. I found seven gateways, each gateway representing a set of key experiences embedded in their stories. Together these gateways offer both a language and a framework for developing practical teaching strategies.”

Rachael Kessler on the Seven Gateways

PassageWorks Comprehensive Curriculum K–12

**First Steps into Elementary School:** A 16-week Curriculum to Support the Transition into the Kindergarten Year that provides a structure for teacher and peer support at school, designating time for students to be heard and acknowledged as they share about this significant transition period in their lives.

**Making Healthy Transitions out of Elementary School** (for the 5th or 6th grade year) provides tools that help students and parents cope and thrive as they navigate the profound shift that comes with completing this stage of childhood and schooling and preparing for the academic, physiological, social and emotional challenges of adolescence and middle school.

**Entering the Culture of Middle School** (for the 6th or 7th grade year) strengthens individual identity while fostering meaningful new relationships across social divides. This program promotes a culture of kindness and emotional and social competence that can mitigate the slide into incivility, insecurity and the lure of risk common to the middle school years.

**Journey into High School** (for the 9th or 10th grade year) is designed to build community, promote identity definition and resilience, and take students and teachers on an inward exploration of meaning, self awareness, and transitions.

**Senior Passages** (for the 12th grade year) is a school-based approach to rites-of-passage designed to help students navigate the major transition at the completion of high school, which is often characterized by both deep anxiety and exquisite awakening. This course has been used successfully for 20 years in public and private education and has been adapted to a 45-minute class period.

**Newcomers Transition Curriculum** serves students who are recent immigrants, a population at especially high risk for alienation from school, school failure and self-destructive behaviors. This curriculum offers students the opportunity to honor the people, lands, cultures and personal identities they have left behind; reclaim and integrate aspects of their past; and become empowered to move with strength and confidence as they transition into a new school, culture and country.

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The PassageWorks Approach to Curriculum

Supporting students in critical transition years is an essential component of their future success. Research shows consistent student achievement loss associated with the shift from self-contained elementary schools to intermediate-level schools. And, nationwide, the rate at which 9th grade students drop out of school before 10th grade has tripled in the past 30 years. Our curricula are designed to honor and support the transition into and out of elementary, middle and high school.

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PassageWorks has been a profound experience for both my students and myself. The work we have been engaging in through the curriculum has strengthened our connections to one another while adding a whole new depth to our community. The children seem to be gaining a deeper understanding of themselves, as well as recognizing the importance of strong peer connections and what it means to build trust in others and be a trustworthy person themselves.

The children look forward to our Friday PassageWorks hour and are thoroughly disappointed if we miss a session together. I wish I could do PassageWorks with my students every day!

5th Grade Teacher
During the past eighteen months, PWI engaged in an intensive curriculum writing and revising phase. Involving PWI faculty, staff and colleagues including Catherine Fink and Ari Gerzon-Kessler, we revised two curricula, wrote four new curricula and entered into a development phase for a Journey Beyond Middle School curricula. This represents a tremendous accomplishment for PassageWorks and prepares us to serve greater numbers of students and schools.

Newly Revised and Upgraded Curricula

**Making Healthy Transitions out of Elementary School** (for the 5th or 6th grade year). PWI staff conducted focus groups with teachers who have used this Elementary School program for several years. After gathering this essential input, faculty member, Carrie Simpson, and Associate Program Director, Laura Weaver, thoroughly revised this curriculum in the fall of 2006 to provide an upgraded version for our first rural pilot test of this program. Reports were very positive from East Prairie principals who partnered with teachers and a counselor to implement the curriculum with three sections of 6th grade students.

**Journey into High School** (for 9th and 10th grades). With the input of PWI faculty and Poudre High School teachers, Laura Weaver engaged in an intensive revision of this high school curriculum, originally developed by our Founder for use in the PHS project (see PHS section for more details).

- “Students’ experiences in their first year of high school often determine their success throughout high school and beyond. However, more students fail ninth grade than any other grade...
- Ninth grade attrition is far more pronounced in urban, high-poverty schools: 40% of dropouts in low-income high schools left after ninth grade, compared to 27% in low-poverty districts (EPE Research Center, 2006).
- In schools in which transition programs are fully operational, researchers saw a dropout rate of 8%, while schools without transition programs averaged 24% (Reents, 2002).”

The Personalization of High Schools

With a national high school reform movement emphasizing the “personalization” of high schools and the importance of “small learning communities,” more schools are recognizing the need for advisory programs to accomplish this goal of supporting students' sense of belonging and teachers' ability to grow into a mentor/advocacy role and foster meaningful teacher-student and student-student relationships. The PWI approach is unique in providing a systematic, developmentally sequenced approach to curriculum and teacher training that meets this emerging priority in education.

Rachael Kessler

"The transition from high school into college or the workforce is a key turning point in the lives of young people. Regardless of their chosen careers or academic paths after high school, young people must have the capacity to grapple with complex problems in order to maximize their potential for professional and personal success. Far too many students are not receiving an education that adequately prepares them for life following high school, especially at-risk, special education, and minority students." 1

New Curricula

To meet the demand of our PHS Demonstration and Research Site and to expand our offerings, we developed three additional high school curricula: Senior Passages, Newcomers Transition, and the Service-Learning.

Senior Passages

Senior Passages provides a school-based rite-of-passage that helps students navigate this major transition. To create this new curriculum, Rachael Kessler adapted and expanded her original Senior Passage Book—a curriculum used for twenty years in schools around the U.S. She modified the lessons, originally designed for 90 to 120 minute elective classes, to meet the needs of a broad spectrum of educators and students in a 45 minute class typical of high school advisory programs. This was a daunting, but successful experiment. Senior Passages was also expanded from a one-semester program to a full year program. We are excited to have a tested curriculum that is accessible to a broad audience of high school teachers.

As weeks passed, I started to trust people for the first time in years. I was comfortable with them and I looked forward to seeing them in school every day. Remember all those times I said I hated everyone at my high school and that none of them were worth my time? Well, suddenly, I didn’t hate anyone anymore. That’s one of the things I learned has impacted me the most—I discovered the beauty of an open mind.

12th Grade Student

Newcomers Transition Curriculum
While this program was originally developed for the English-only philosophy of many Newcomer Programs, PWI had an opportunity to pilot test this program at Poudre High School in a “Spanish for Spanish-speakers” program with 50 students in 2006 and 25 in 2007. Laura Weaver worked closely with a cohort of Newcomer teachers, colleagues from around the country, and our Founder to develop a full-year 35-lesson curriculum. Francisco Garcia-Quesada, PWI faculty member and long time Newcomer specialist in New York, gave intensive feedback and supported the completion of this curriculum.

“Immigrants have always brought our country huge gifts—knowledge, experience, cultural diversity. PassageWorks helps students to feel welcomed and honored here... students are not talked down to or seen as an intruder. In schools that aren’t adequately dealing with the needs of Newcomer students, a lot of students are dropping out and feeling a great sense of despair.”

Francisco Garcia-Quesada, Fieldstone Secondary School, Thiells, New York

They asked us questions that I had never asked myself and I got to know myself better and I am more ready for what is it to come.

Student in Newcomer Advisory Program

“Our schools are rapidly changing. One of every five school-aged children in the United States comes from a home where a language other than English is spoken. One of every three teachers has an English Language Learner in his/her classroom. Over one-third of foreign-born Hispanics do not complete high school”

The PassageWorks Service-learning Curriculum seeks to integrate service to the outer world with the search for meaning and purpose that is a critical part of adolescent development. A soulful approach to community service teaches social responsibility not as a burden or obligation, but as a sense of connection and empowerment.

Introduction: PWI Service Learning Curriculum

Service-Learning Curriculum
Responding to a request from Poudre High School to provide an advisory curriculum for their 11th grade students, PWI stretched outside of our core model to create this Service-Learning curriculum in 2006. Because of unforeseen changes in the professional commitments of our two service-learning specialists in 2007, we no longer have PWI adjunct faculty to provide training and essential program refinement. Although we continue to pilot this Service-Learning program with several schools, we are choosing to focus on completing our full set of transition curricula and will return to exploring the best use of the service-learning material when we have completed that comprehensive goal.

First Steps into Elementary School
Over the summer of 2007, our Founder collaborated with PWI faculty member, Carrie Simpson, to create a new kindergarten transition program. This pilot program was launched in the fall of 2007 in four classrooms in Missouri and three in Colorado, serving 175 students and 6 teachers. Many schools around the U.S. are interested in purchasing this program when we complete the pilot test phase. We are currently seeking funds to complete the second half of the project so that we have a full year curriculum, a Spanish translation, an urban pilot site, and video support for teachers utilizing the curriculum.

Curriculum In Development

Journey Beyond Middle School (for 8th/9th grades)
In the summer of 2007, PWI launched the development of an 8th grade transition program in which our Founder is collaborating biweekly to create lesson plans with Diana Bamford, a Language Arts teacher, and Bruce Rose, a PWI faculty member and middle school counselor. Bruce and Diana are implementing PassageWorks lessons in three sections of 8th grade Language Arts class at Eldorado K-8 in Boulder, Colorado. We are taking a new approach to this curriculum integrating PWI practices and principles with Language Arts content so the curriculum, can be delivered either in a stand alone advisory program or through a Language Arts class. Curriculum writing will begin in the summer of 2008.
Faculty Development

... PWI offers programs and mentoring for educators in the field, develops and certifies PWI faculty, and collaborates with universities on pre-service certification programs for teachers and principals....

PassageWorks is committed to supporting the professional development of teachers and focuses its efforts in three different domains: PWI offers programs and mentoring for educators in the field, develops and certifies PWI faculty, and collaborates with universities on pre-service certification programs for teachers and principals. PWI is also building a digital library of video and audio recordings of teachers, students and PassageWorks faculty to provide multimedia tools to enhance our existing professional development programs and as a foundation for new distance learning courses we plan to launch in the near future.

Programs for Educators

The Soul of Education Foundation Course, designed for teachers, administrators, counselors, youth workers and parents, prepares participants to implement the PassageWorks Model in school and youth development settings. The Foundation Course is generally scheduled three times each year in Boulder, Colorado and can be scheduled on-site for professional development for schools across the country. This entry level course offers educators and youth development professionals the principles and practices essential

The Soul of Education Foundation Course
Feedback from Participants

“...This workshop has changed the way I teach completely. Nothing I have ever studied has made such an impact on what I do in my classroom. I will never be the same as a teacher now that I have started integrating these principles into my work. I am grateful that they have shown me there is a better way to relate to kids and to have an impact on the lives of my students.”

High School English Teacher

“Every single activity in the Soul of Education Course stretched me in ways both profound and fun.”

Teacher, Jefferson County Open School

“This workshop will be the single most important addition to your teaching you will undertake in your career....”

Jenelle Peterson, 5th grade teacher, Maui, HI

“This workshop is essential. Do it. It has the potential to change your life professionally and personally and to change the lives of your students...”

Foundation Course Participant
The Teaching Presence

Beyond technique and curriculum, the most effective teaching also includes a more elusive quality that profoundly affects the learning that is possible – the teacher’s own way of being with students. We celebrate those precious moments when we embody a “presence” that carries the class to a place where minds and hearts are moved and genuine connections occur. Some teachers just naturally live there most of the time. But how do we find that place? What qualities of teaching or being do we develop to discover what I have called the “teaching presence?”

• **Open Heart:** willingness to be vulnerable, willingness to care, respect for one’s own boundaries, acknowledging our own “shadow,” working with obstacles to caring
• **Being Present:** alert and relaxed, flexible and responsive to the needs of this moment
• **Discipline:** clarity of purpose, willingness to set boundaries with respect, inner strength to be able to risk being disliked
• **Emotional Range:** growing comfort in self and others with joy, grief, anger, exuberance, fear, silence, vulnerability

Nourishing the hearts of students, our own souls are fed. We find renewal of our passion for teaching and a long term recipe for avoiding burnout...  

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Certifying PassageWorks Faculty

We now have a cohort of 14 educators who are in varying stages of the process of becoming fully certified PassageWorks faculty members. They represent Colorado, the Northwest, Northeast, Midwest, and Southwest. We have also recruited several new educators into the apprentice level who can broaden our reach to educators from several different sectors who have expressed strong interest in our work, including urban, rural, Southern, Waldorf and Jewish Education teachers. Finally, we are beginning to develop a cadre of PassageWorks trainers who are or have been school leaders and can provide training that focuses on administrators who can be champions for systemic change.
During the last year and a half we have taken many steps towards building this team of trainers who can respond to the growing need to provide PassageWorks courses and mentoring in two settings:

- School-based professional development for systemic change initiated by school leadership (school-wide, grade level, etc.); and
- The *Soul of Education* Foundation Course: a 2.5 day intensive offered in Boulder and other sites open to individuals and teams of educators and youth development specialists from a variety of settings.

As part of our efforts to bring trainers to full certification, PWI has:

- Provided general support, coaching and supervision as faculty-in-training co-facilitate or assist at courses;
- Offered trainers opportunities to refine their presentation skills with the help of several outside specialists;
- Begun revising our Foundation Course manual and Foundation Course agendas to better support facilitators;
- Created a self-evaluation and team evaluation process that can assist the evolution of individual trainers and training teams.
New Initiative for Pre-service Teachers & Principals

In addition to providing curricula and professional development at all levels of elementary and secondary education, we have realized the value of infusing our model into pre-service teacher education. In 2007 we initiated a collaborative exploration with leadership from the Colorado State University (CSU) Teacher and Principal Licensure Programs to integrate PWI principles and practices into already existing required courses for teachers and principal candidates. We are collaborating with the National Network for Educational Renewal on this project, thus laying groundwork for broad distribution through their national network.

Digital Library

Supported by a number of generous designated gifts as well as the in-kind contributions of Marya Read and People Productions, we have launched an initiative to gather video footage and audio recordings of teachers and students to serve a variety of purposes. Our digital library will include a rich collection of media that will:

- provide a basis for on-going distance teacher training and support for PassageWorks faculty;
- provide support for educators during initial on-site trainings and through follow-up distance learning opportunities;
- contribute to web-based coursework for teachers that will provide advanced training/mentoring for college credit;
- facilitate collaboration and sharing of best practices among PassageWorks sites and trainers;
- support curriculum implementation for teachers by providing documented real-life examples of lessons in action.

In the fall of 2007, we began gathering video documentation of the PHS project, our Foundation Course and elementary school programs. Already, we have had the opportunity to share video clips from deeply moving interviews with students, faculty and administrators at several local and national presentations of our work.

“Being a trainer for PassageWorks raises my own expectations of myself and of the teachers I work with. In order to 'walk my talk', I must deeply practice listening to my own heart and removing my obstacles to presence. I am drawn to higher awareness of what really works with my students and this allows me to help teachers pay attention to their deeper and meaningful moments of true connection with self and student.”

Chuck Fisher, PassageWorks Faculty

Dana Knox & Catherine Fink
PWI Faculty members
Outreach

“...Rachael Kessler's ongoing leadership has been a vital contribution to our efforts to build the emerging field of Spirituality and Education...”

— Professor Bob London

PassageWorks staff and faculty contribute to the growth of the field of transformational education through public presentations, colloquia and workshops and by writing journal articles and chapters in scholarly as well as popular educational publications. PWI promotes discussion and learning among those who work with children and youth about the relationship between nurturing the inner life, academic performance, character development, the prevention of destructive behaviors, and civic engagement. PWI also has a rich history of fostering alliances and dialogue across the spectrum of beliefs in order to enhance this educational reform movement.

“Rachael Kessler's ongoing leadership has been a vital contribution to our efforts to build the emerging field of Spirituality and Education. She has been a catalyst for rich collaborations with her colleagues that have helped us identify principles of best practice in field building. As one of the early theorists and practitioners of integrating spirituality in education, Rachael offers conceptual clarity on best practice for the classroom as well as strategic insights on broadening our collaborative network and our impact on public education.”

Dr. Bob London, Professor, California State University-San Bernardino and Director, Spirituality and Education Network

Our Founder's Field Building Initiatives

- Awareness and Concentration in Teacher Professional Development, at the Garrison Institute. This was an invitation-only forum in January 2007 which aimed to identify promising strategies to facilitate transformative teacher development and increase teachers’ contemplative capacity to promote awareness and concentra-

“Rachael Kessler has not only done valuable, groundbreaking work and is a skilled writer, but she is also an excellent speaker. Her keynote address on “The Soul of Education” was articulate, practical and filled with warmth and wisdom. Participants—both parents and professionals—were inspired by both her keynote and follow-up workshop.”

Rahima Baldwin Dancy, author, educator and conference organizer

The creative drive — Whether developing a new idea, a work of art, a scientific discovery, or an entirely new lens on life, students feel the awe and mystery of creating.
The forum brought 20 distinguished scientists and educators to the Garrison Institute for cross-disciplinary idea exchange.

- **Uncovering the Heart of Higher Education: Integrative Learning for Compassionate Action in an Interconnected World.** Rachael Kessler and Laura Weaver attended this conference for inspiration, learning and networking.

- **Spirituality and Education Network International Summit, Malibu, California: 2007.** Offered Rachael the opportunity to present to a group of educators in the emerging field of Spirituality in Education. Additionally, Rachael consulted to leadership both before and after the initiative on creative approaches to field building. Her efforts catalyzed a dialogue between Bob London, Director of the Spirituality and Education Network; Michael Lerner of the New School at Commonweal; and Maurice Elias, former Co-chair of the CASEL Leadership team and a strategic architect of the field of social and emotional learning.

- **Tipping Point Network (TPN).** Rachael was invited in January 2007 to join the Tipping Point Network to represent the field of transformative education. TPN is a network of social change agents and philanthropists working towards an integrated approach to planetary sustainability. TPN has provided opportunities for learning, collaboration, and new sources of support for our work.

**Founder's Presentations and Published Interviews**

- **“Whole Child, Whole Family” Conference, Oct. 2006.** Rachael provided a keynote at this conference for parents which also included many educators from local Waldorf schools.

- **Radio interview with PWI advisor, Michael Lerner, May 17, 2007, Nurturing the Inner Life in Education with Rachael Kessler and Dr. Rachel Naomi Remen, Director of The Institute for Health and Illness at Commonweal. This provocative conversation, available as a podcast from The New School at Commonweal, explored the parallels and differences of working with the inner life of K-12 teachers and students compared to medical students and doctors.

- **National Network for Educational Renewal (NNER) Annual Conference, West Virginia, October 2007.** Rachael co-presented a session on our demonstration project with two teachers from PHS - Lorri Fowler and Brian Faulkner.

“As recent world events have taught, there is a danger to each of us—locally and globally—when children grow up with knowledge but without social-emotional skills and a strong moral compass. Hence, a combination of academic and social-emotional learning is the true standard for effective education in the world today and for the foreseeable future.”

**Maurice Elias, “Academic and Social-Emotional Learning”**

• The Association of American Schools in South America, October 2007, Putting the Heart Back in the Art of Teaching. Rachael provided a keynote and several workshops for 500 educators from International Schools in this region at their annual conference in Rio de Janeiro. Following the conference, Rachael had the opportunity to participate in a leadership training retreat focused on integrating spirituality into the workplace.

• ChildSpirit Institute’s 3rd North American Conference on The Spirituality of Children and Youth, November 2007. Rachael was one of several keynote speakers, including Cynthia Bourgeault, Joseph Chilton Pierce, and Jean Houston for this conference convened by our long time strategic ally, The ChildSpirit Institute, led by PWI advisors, Tobin Hart, and Mary Hart. As a nonprofit educational and research organization ChildSpirit is dedicated to understanding and nurturing the inner life of children.

Publications

Since the formation of the Institute, we have been committed to extending the opportunities for authorship and publication about our model beyond the scope of our Founder. Beginning to actualize this goal, six colleagues from our teacher, administrator and trainer groups have published articles this past year in a variety of professional journals about their experience with the PassageWorks Model.

• Fishbein, Arlene. “Feeling at Home in Their Own Skins”. Jewish Educational Leadership, Volume 5:2, Winter 2007. A poignant and moving article that takes the reader inside the classroom of a PassageWorks class of middle school children. Written from the teacher’s perspective, Fishbein allows us to experience just how moving the curriculum can be for teachers as well as students.

“In an increasingly competitive global economy, the consequences of dropping out of high school are devastating to individuals, communities, and our national economy. At an absolute minimum, adults need a high school diploma if they are to have any reasonable opportunities to earn a living wage... Yet, with little notice, the United States is allowing a dangerously high percentage of students to disappear from the educational pipeline before they graduate from high school.”

Arlene Fishbein, English Teacher, The Samuel Scheck Hillel Community Day School

“Research indicates that for adolescent learners, personalizing the learning environment contributes to greater motivation, increased attachment to learning, and improved achievement, especially for those students who are less successful or feel more alienated (Adelman & Taylor, 2001). For many adolescents, positive connections to peers, school, and learning are also associated with reductions in high-risk behaviors, including acts of violence, drug abuse, and dropping out of high school (McNeely, Nonnemaker, & Blum, 2002).”

- Heath, Mellisa. “PassageWays”. The Elementary Principal. May 2007. A principal of a Missouri elementary schools shares how PassageWorks has changed the life of her students and faculty.

- Turnbo-Smith, Donna. “Have You Ever”. The Elementary Principal. May 2007. Smith shares with the reader some of the ways that PassageWorks has brought her students together, allowing them to see things in each other they never thought they would.

- Fowler, Lorri and Weaver, Laura “Unique Partnership Formed — PassageWays and Poudre High School”, National Network for Educational Renewal (NNER) article, May 2007. Poudre High School teacher Lorri Fowler and staff member Laura Weaver co-wrote an article describing the PWI Demonstration and Research project in Fort Collins.


“Part III concludes in Chapter 22 with an approach to teaching for morality and character developed by Rachael Kessler and her colleagues at PassageWorks Institute that focuses on the connection to spirituality, and is often confused with religiosity. For that reason, spirituality is thus typically absent from approaches to social and moral development advocated in the majority of educational programs. In their chapter Kessler and Fink attribute many of the difficulties being confronted by today’s youth as emerging from a sense of spiritual void. They offer an approach to help youth respond to challenges by engaging in educational practices that attend to their emotional and spiritual needs. Kessler and Fink write as practitioner-scholars in a style that will likely appeal to many readers of this handbook who are confronting similar challenges in their work for students.”

Our Organization

...The Institute has built a strong platform based on our Founder’s twenty-two years of work, and is poised to expand its impact on education in North America...

To accommodate the increasing demand for new curricula, support materials, and coaching for our programs and faculty over the last year and a half, we have reorganized the PassageWorks team, hired a new Executive Director, and created new systems for project management. This was vital as we created, revised and produced multiple curricula in support of our two primary Demonstration Sites. The Institute has built a strong platform based on our Founder’s twenty-two years of work and is poised to expand its impact on education in North America.

Our Staff

In January of 2007, the board began to explore the need to restructure the leadership of the Institute to support the anticipated growth and dissemination of our programs. The decision was made to hire a new Executive Director to focus on administration and capacity building in order to free our Founder Rachael Kessler to provide leadership in visioning, strategic planning, curriculum design, faculty development, and outreach to the field of transformational education. The search for a new Executive Director began in September 2007 and was completed in December with the hiring of Mark Wilding who began as Executive Director on January 1, 2008. Rachael Kessler is now President, working full time in a collaborative leadership role with Mark.

Our Associate Director, Diana Yourell, left PassageWorks in December to pursue new career opportunities. Diana developed new systems that supported our growth in 2006 and 2007, spearheading our name change and strategic planning. We are grateful for all Diana contributed in the past year and half. In addition, in January 2008 we promoted Laura Weaver to Associate Program Director and Liz Amore to Operations Manager.
“Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has.”

Margaret Mead

PassageWorks Advisory Board

Angeles Arrien
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Peter Cobb
Dee Dickinson
Maurice Elias
Jeannette Gerzon
Julie Glover
Mark Greenberg
Tobin Hart
Mutima Imani
Janice Jackson
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Michael Lerner
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Lynnaea Lumbard
Ron Miller
Pamela Seigle
Dan Spinner
John Steiner
Peggy Taylor
Roger Weissberg

The Board and Committees

Board of Directors

At the beginning of 2007, our long-time founding board member and chairman, Jamie Harrison resigned from his 5-year service to PassageWorks. He has remained a friend of PassageWorks, graciously providing transition guidance; we are grateful for his support and advice. We would also like to thank past board members Russell Precious and Marcia Swain for their service on the board. David Brand joined the institute as an advisor in the fall of 2005 and then accepted a board position in 2006. David has been the chair of the board throughout 2007. Jennifer Walton, Erica Shafroth and John Lainson joined our board in 2007, bringing us a wealth of expertise.

PassageWorks Board of Directors

David Brand
Ivan Duran
Gordon Dveirin
Shawna Friedman

Rachael Kessler
John Lainson
Erica Shafroth
Jennifer Walton

Advisory Board

PassageWorks continues to benefit greatly from our esteemed board of advisors and will be relying on the wise counsel of these leaders in this next phase of our growth.

Committees

We are also fortunate to be able to regularly draw on the wisdom of our committee members who offer invaluable consultation and collaboration on a variety of subjects from curriculum to research to program development. Our Finance Committee with John Lainson and Shawna Friedman continues to provide oversight regarding our financial sustainability and accountability.

Our Program Committee, comprised of school and district leaders, policy makers, coaches, and business people, provides an ongoing forum for dialogue and guidance
on many of our immediate as well as long term programmatic challenges and decisions. Our newly formed Development Committee brings fresh perspective, broader networks, and hands-on support to our fundraising efforts. In early 2008, we will be convening a Marketing/Communications Committee to clarify our messages and develop a long-term communications strategy that will support our growth and impact. The committee's work on core messages and strategy will also assist in guiding our video project, the professionalization of our curricula, and our outreach efforts.

In addition to the volunteer support from our committees, we have received the donation of high level expertise from professionals in several arenas: our webmaster, videographer, presentation coach, mentoring and professional learning communities consultants, leadership consultants and research advisors all donated significant amounts of their time to support our progress. Please see the list of our Pro Bono Consultants (see listing on the right).

**Strategic Plan**

With the intention of updating our 2005 Business Plan, we convened our Board of Directors and staff to revisit and refine our mission and vision and to discuss next steps in our path for growth and expansion in 2007-2010. The meeting was facilitated by Sheldon Romer, who had supported us with our original strategic planning and business plan. PWI board and staff agreed to sharpen the focus of PassageWorks on the critical transition years, when students are moving into and out of elementary, middle and high school. With this clarity, and several months of intensive brainstorming, narrowing and documentation led by Associate Director, Diana Yourell, we have developed a set of strategic goals for 2007-2010.

“PassageWorks has built a powerful foundation with its two successful Research and Demonstration sites and is well-positioned to dramatically expand its impact on education in North America. The timing is right for PWI because the critical needs of schools and students are clearly understood, and because many educators are recognizing the wisdom of the Institute’s focus on personalization, transitions, and the inner life of students.”

Mark Wilding, Executive Director

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**Program Committee**
- Liz Berry
- Ivan Duran
- Gordon Dveirin
- Charles Elbot
- Jan Jensen
- Marjorie Larner
- Karla Reiss
- Erica Shafroth
- Ulco Visser

**Development Committee**
- Shelli Angel
- Lynn Israel
- Michelle Osterman
- Jordan Paul
- Terry Retzloff
- Erica Shafroth
- Debra Silverman
- Mary Wolf

**Pro Bono Consultants**
- Daniel Baron - Critical Friends Training
- Dr. Vic Battistich - Research
- Joan Boykin - Marketing and Branding
- Ron Claman - Strategic Thinking
- Tracy Gary - Leadership Coaching
- Lori Hanau - Leadership Coaching
- Sue Keister - Curriculum & Faculty Development
- Marjorie Larner - Critical Friends Training
- Marilyn McGuire - Marketing and Branding
- Ray Neiman - Web master
- Cindi Peck - Research and Implementation
- Russell Precious - Marketing and Branding
- Marya Reid - Video & Graphic Design, Marketing
- Karla Reiss - Coach Training
- Pamela Seigle - Curriculum & Faculty Development
- Cliff Shaffran - Marketing and Branding
- Mary Wolf - Presentation Skills for Trainers
2007 - 2009 Strategic Goals

PassageWorks will:

- Prepare and launch urban pilots and demonstration sites for our curricula;
- Develop an implementation roadmap and support materials—a structured sequence designed to support schools to successfully implement the PWI model and navigate the challenges of systemic change;
- Finalize and publish professional versions of the Journey into High School Curriculum, followed by Newcomers, 5th grade, 6th grade, 12th grade, Kindergarten, and 8th grade curricula;
- Complete a protocol and related print and digital materials for preparation and certification of Foundation Course Trainers;
- Create and present advanced level trainings, including the Teaching Presence Course and Supporting Critical Transitions—a rites of passage model; these will include both on-site and distance learning modules;
- Support and collaborate with researchers to complete evaluations of our recent demonstration projects (PHS/East Prairie) and our upcoming urban pilots;
- Explore collaboration at a university level for infusion of our principles and practices into pre-service teacher and principal education;
- Convene advisors, staff and board to develop a comprehensive strategic plan for growth and expansion of both our programs and of the broader fields that address education for the inner life;
- Create a Marketing/Communications Strategic Plan that includes the refinement of core messages, the production of a digital library and significant upgrading of our website and printed collateral materials;
- Develop a comprehensive long-term development plan to provide the financial and organizational resources necessary to broaden our impact on schools.

Vision Statement
The vision of the PassageWorks Institute is of a world in which all young people are nurtured in their search for meaning, deep connection, and integrity, supporting them to build character and excellence in ways that foster compassion for themselves and for the people and world around them.

Mission Statement
The mission of the PassageWorks Institute is to inspire, prepare, and support educators, on a systems-wide basis, to implement its proven model for nurturing the inner lives of students.
Financial Summary

...Over the past two year period, the Institute has exceeded its goals for both program revenue and contributions, and spent less than its budgeted expenses.....

We are pleased to report that by September 2006, we had secured gifts to support the 2006 year's full fiscal budget, and we closed the year with a surplus of $107,016, of which $75,000 was set aside in a newly formed reserve account. This account provides PWI with a three month operating reserve, and the remaining additional income allowed us to carry over $32,016 into the 2007 budget. We also secured pledges in late 2006 for almost $100,000 for 2007. PWI's financial stability and security allowed our Founder/Executive Director to focus more time and energy on program needs during a period of high demand from our demonstration sites.

In 2007, in addition to fee for service and product income, we received several large multi-year foundation gifts. Additionally, in the summer of 2007, new donors pledged over $60,000 for our digital library and the first phase of the new Kindergarten curriculum.

Our total expenses for program and support were $364,529 and $361,143 respectively for 2006 and 2007. Over the past two year period, the Institute has exceeded its goals for both program revenue and contributions, and spent less than its budgeted expenses. This has enabled PWI to fulfill its programmatic goals and objectives while also funding a financial reserve. Our operating budget for 2008 is $468,900. PWI has engaged and loyal donors, many of whom commit to multiple year giving plans. We have plans to develop new product and service revenue streams, and we will continue to cultivate new relationships with individuals and organizations that are inspired to support the work of the PassageWorks Institute. (See Financial Summary on the right.)

Financial Summary 2006 and 2007

<table>
<thead>
<tr>
<th>Revenue and Support</th>
<th>2006</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individuals &amp; Family Gifts</td>
<td>108,516</td>
<td>131,035</td>
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<tr>
<td>Foundations/Grants</td>
<td>237,201</td>
<td>165,000</td>
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<tr>
<td>Product sales</td>
<td>9,289</td>
<td>10,699</td>
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<tr>
<td>Fee for Service*</td>
<td>93,640</td>
<td>7,600</td>
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<tr>
<td>Foundations Course</td>
<td>18,730</td>
<td>15,075</td>
</tr>
<tr>
<td>Program Revenues</td>
<td>121,659</td>
<td>33,374</td>
</tr>
<tr>
<td>Interest Income</td>
<td>3,978</td>
<td>5,250</td>
</tr>
<tr>
<td>Other income</td>
<td>191</td>
<td>68</td>
</tr>
<tr>
<td><strong>Total Revenue and Support</strong></td>
<td><strong>471,545</strong></td>
<td><strong>334,659</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Program Services</td>
<td>191,249</td>
<td>227,228</td>
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<tr>
<td>General and Administrative</td>
<td>101,862</td>
<td>78,103</td>
</tr>
<tr>
<td>Fundraising</td>
<td>71,418</td>
<td>55,812</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>364,529</strong></td>
<td><strong>361,143</strong></td>
</tr>
</tbody>
</table>

*Note: Cash from Fee for service revenue in the amount of $32,433 was collected in 2007, but is reflected in 2006 financials based on accrued earnings.¹

This report is for the period July 1, 2006 to December 31, 2007, and thus includes summaries of both 2006 and 2007 finances.

Thank You

Thanks to the generous support of our donors, board of directors, committees, and pro bono consultants, PassageWorks continues to inspire, prepare, and support educators to implement our model for nurturing the inner lives of students. We are grateful to the following financial contributors who helped make our work possible in the past eighteen months:

Foundations and Organizations
• Angeles Arrien Foundation for Cross-Cultural Education and Research
• Bebe and Tom Dunnicliffe Charitable Trust
• Community Foundation Serving Boulder County
• Kalliopeia Foundation
• MADA Charitable Lead Trust
• New Visions Foundation
• Rose Community Foundation
• RSF - Innovations in Social Finance
• Records-Johnson Family Foundation
• Schramm Foundation
• Shinnyo-En Foundation
• The Bay and Paul Foundation
• The Compton Foundation, Inc.
• The Israel Family Foundation
• The Morris Foundation
• The Pajwell Foundation
• The Tides Foundation
• The Whitman Institute

We would also like to thank our anonymous donors for their generosity.

Joy and delight can be experiences of great simplicity, such as play, celebration, or gratitude.

Individuals
• David Brand
• Randy Byrnes
• Mark Carson & Associates
• Jenny and Bob Chartoff
• Dick and Laura Chasin
• Ron Claman and Tova Jacober
• Randy Compton
• Susan Davis
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• Rachael Kessler
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• Elizabeth and Josh Weinstein
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