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# Program Review



January 2000

Report No. 99-26

## Management Training Act Should Be Revised

### *at a glance*

- Although the Management Training Act has not been fully implemented, most of its major directives either have been accomplished or assumed by the Department of Education. The act should be substantially revised to reflect current needs.
- School districts are generally satisfied with the state's principal certification requirements but are often unable to fill principal vacancies due to a shortage of high quality candidates. Certain aspects of the certification process may unnecessarily prevent qualified persons from becoming certified as principals.
- The state must increase coordination and cooperation between school districts and colleges of education and eliminate barriers to ensure individuals with skills needed to improve student performance become principals.

### Purpose

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With the state's educational reform initiatives to improve student performance, legislative interest has emerged to identify ways to better ensure that school principals have the skills needed to be effective catalysts of change. One issue of debate has focused on whether current certification requirements are needed to ensure that principals have the knowledge and skills needed to improve student performance. In 1999 the Florida Legislature passed HB 751, which directs the Office of Program Policy Analysis and Government Accountability, in consultation with the Department of Education (department), to conduct a comprehensive review of the Management Training Act by January 1, 2000, and make recommendations for the act's repeal, revision, or reauthorization.

This review assesses the Management Training Act results in providing for a support system to promote excellence in the performance of principals and other educational managers. Since the Management Training Act is closely aligned with the principal certification process, this review also addresses principal certification requirements.

## Background

### *The Management Training Act*

In 1979, the Florida Legislature established the Management Training Act to provide for a state, regional, and district support system to ensure that principals and other educational managers have the skills, experience, and academic background necessary to be effective leaders. To achieve the intent of the act, the Legislature created three entities: the Council on Educational Management, the Academy for School Leaders, and the Center for Interdisciplinary Advanced Graduate Study.

The Council on Educational Management is charged with identifying, validating, and developing performance measures for competencies associated with high-performing principals and other school managers.<sup>1</sup> In carrying out its duties, the council must

- identify training processes necessary for the development of said competencies and develop competency certification procedures, compensation policies, screening, selection and appointment criteria, and program approval guidelines;
- establish an education management and development network; and
- make an annual report to the Legislature, the Governor, and the Commissioner of Education regarding expenditures, activities, and accomplishments of the council, academy, and center. The report must describe the council's objectives for the following year, recommend the level of funding needed to achieve those objectives, and make other recommendations the council deems appropriate.

The Academy for School Leaders is charged with providing in-service training for school managers for the purpose of upgrading the

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<sup>1</sup> The council is assigned to the department for administrative purposes.

quality of management at all levels of the public school system in the state. The council was to serve as the academy's board of directors and establish guidelines under which the academy must conduct training institutes to address problems and current needs of school managers.

The Center for Interdisciplinary Advanced Graduate Study is to pursue advanced educational opportunities and to conduct research for further improvement of school principals. The center is also responsible for coordinating with the council to provide training for both current and prospective principals and assistant principals.

The act also authorizes school districts to develop in-service programs to train district and school-level administrators and potential administrators in the competencies the council deems necessary for effective school management. These district training programs are subject to review by the Florida Department of Education. School boards may provide salary supplements to principals who successfully complete such training.

### *Principal Certification Requirements*

Florida law requires that principals attain certification to ensure that they have the competencies needed to be strong, competent administrative and instructional leaders who will be successful at improving public schools. The work completed by the council is reflected in Florida's current principal certification requirements. An individual must meet all the following requirements to obtain principal certification in Florida:

- teach at least three years;
- complete a master's degree in education administration, administration and supervision, or education leadership;<sup>2</sup>

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<sup>2</sup> A master's degree in another discipline with 30 semester hours covering the eight core curriculum areas of the master's in education administration, administration and supervision, or education leadership will also suffice.

- pass the Florida Education Leadership Examination (leadership examination); and
- complete a state-approved district-level principal preparation training program.

Florida's principal certification requirements are similar to those established by 33 other states we reviewed. Most of these states require individuals who wish to become principals to hold a master's degree, have teaching experience, and pass a competency examination. However, Florida is the only state that requires candidates to complete a state-approved, district-level training program prior to certification. Twenty-five of the states we reviewed require candidates to complete an internship as a condition of certification. These internships may be similar to Florida's district-level principal preparation training program.

## Findings

### *The Management Training Act has not been fully implemented*

Although the Management Training Act was intended to provide a framework to prepare principals to be effective school managers, it was never fully implemented. After the act was passed by the Legislature in 1979, the Florida Council on Educational Management met and carried out most of its statutorily assigned responsibilities. However, the council has not met since 1994. Its ongoing responsibilities have been assumed by other entities such as the Department of Education and the Florida Association of District School Superintendents under contract with the department.

The council accomplished the bulk of its statutorily assigned directives before it became inactive. For instance, the council developed a list of 19 principal competencies, a leadership examination, a competency-based certification program, and district-level principal preparation

training program guidelines that are in use throughout Florida school districts. It developed similar guidelines for university education leadership programs. In addition, the council established a mechanism to facilitate communication, involvement, and mutual assistance among educational managers. The council accomplished this by developing five regional training networks or consortia.

The department, which is responsible for principal certification, incorporated the council's products into its principal certification requirements. The department contracts with the Florida Association of District School Superintendents to review individual school district principal training programs to determine conformance with the council's guidelines. The association presents its findings to the commissioner for review and approval. As part of its contract with the department, the association also has revised these guidelines to accommodate major legislative mandates since the council no longer exists.

While the Council on Educational Management generally carried out its responsibilities, other aspects of the Management Training Act were never implemented. Neither the Center for Interdisciplinary Advanced Graduate Study nor the Academy for School Leaders now exists. Although three universities submitted proposals for creating the Center for Interdisciplinary Advanced Graduate Study, none were accepted due to disagreements over how to implement the center. The Academy for School Leaders was initially established but was phased out as the five regional development networks, which serve the same general function, were established.

In the absence of the center and the academy, school districts have assumed the responsibility for providing in-service training and advanced educational activities

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for principals, either directly or through contracts with consultants. In some cases, districts have received support for these functions from educational training networks and consortia. The Florida Association of District School Superintendents provides some principal training through a grant from the Department of Education.

The training system envisioned by the Management Training Act has also been in part superseded by subsequent education reforms. For example, Florida's "A+ Plan," passed in 1999, specifically amends provisions for assessing school personnel to include school-based administrators. Student performance is now a major factor in how schools are evaluated. Annual administrator assessments must be based primarily on student performance outcomes as measured at the state and local level. The responsibility for ensuring that principal certification standards are aligned with these new state education initiatives has been assumed by the department.

### ***Although school districts expressed general satisfaction with certification requirements, several issues should be addressed to meet the intent of the Management Training Act***

In addition to examining the implementation of the Management Training Act, we assessed the extent to which the act's overall intent—preparing individuals to become school principals—has been accomplished. We based our assessment on two statewide surveys, one of principals and one of district human resource supervisors. In addition, we visited seven school districts throughout the state and spoke with numerous local and state educators.<sup>3</sup>

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<sup>3</sup> We visited Bay, Dade, Duval, Escambia, Orange, Hillsborough, and Gadsden county school districts and spoke to 116 individuals including principals, principal supervisors, and human resource management and development staff.

School district human resource supervisors and principals reported that they were generally satisfied with Florida's certification requirements. For example, there was general support for the requirements that principals must have served as teachers for a period of time, that they should have advanced training, and pass a competency exam.

As of May 1998, the most current data available, 5,162 persons were certified to serve as principals. However, roughly one-third of the human resource supervisors we surveyed indicated their districts had trouble filling vacant principal slots over the past two years. Human resource supervisors indicated that individuals who applied for open slots met certification requirements but did not have the leadership qualities needed to be a principal in their districts. This is consistent with survey results that showed 78% of principals believe that teachers with the most leadership potential are not pursuing principal certification. As a result, approximately one-half of the districts employed individuals who were not fully certified to fill open principal positions since they could not find suitable certified candidates.

District staff, other stakeholders, and professional literature identified several problems in the certification process:

- principal training is hindered because coordination and cooperation between some school districts and colleges of education is weak;
- prospective principals, especially in areas that are geographically distant from a university, can have trouble accessing coursework needed to complete their certification; and
- individuals with the leadership potential can be discouraged from pursuing principal certification due to the certification process itself.

***In some cases, coordination and cooperation is weak.*** The requirement that principals must have a master's degree in education administration, administration and supervision, or educational leadership is intended to help ensure that principals have the knowledge needed to be effective school leaders. Accordingly, the degree programs offered by colleges of education must teach the types of skills and knowledge that principals need to be successful.

Some districts have established relationships with individual universities to help ensure that graduates of master's degree programs gain specific skills and knowledge needed to be effective school leaders.<sup>4</sup> However, one-quarter (14 of 57) of the human resource supervisors we surveyed expressed general dissatisfaction with the level of coordination and cooperation these relationships provide. Human resource supervisors in the seven districts we visited generally agreed and believed the curriculum offered in educational leadership master's programs often is outdated, too theoretical, and lacking in practical information that would be useful to principals once they become school administrators. In general, stronger agreements and partnerships are needed to ensure that principals have the education and experiences needed to be effective

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<sup>4</sup> For example, some districts reported shared initiatives offering university courses in district facilities, district participation in university course design, and the use of district staff to teach university courses. The Duval County School District has established an agreement with Jacksonville University to ensure that students completing the university's master's degree program can effectively apply theoretical concepts they learn. As part of this agreement, Duval County School District staff teach selected courses on Saturdays to a cohort of 15 teachers. Participating students must create a portfolio, conduct interviews with district principals, learn about school budgets, and use competencies to complete tasks. Other school districts reported initiatives such as district principals teaching university courses to help provide real-life situations to the students.

school leaders and to identify areas where programs can be improved.

A draft report by the Florida Professors of Educational Leadership indicates that stronger linkages between districts and colleges of education are needed to ensure that principals attain both the theoretical and practical knowledge needed to be effective leaders. The report found that university programs have not been challenged to move beyond traditional curricula and that currently these programs emphasize theory and research rather than practice and applications. The report concluded that university programs need to provide a strong emphasis in critical areas, which include statistical analysis of student performance data, school-based management, budgeting, decision-making, and community relations.

***Some individuals have trouble accessing the coursework needed to complete a master's degree.*** Some districts that are not in close proximity to a major university noted that access to educational leadership master's program coursework is limited. As a result, full-time teachers seeking certification in these districts may take longer to complete their master's degree or may choose not to pursue a principalship, particularly if faced with long commuting distances or the need to relocate in order to pursue a master's degree. Teachers residing in school districts located in rural areas are particularly affected by this lack of access.

Suggestions to improve access included offering more opportunities for teachers to earn master's degrees in educational leadership at night or on weekends and establishing alternative delivery methods to increase access. Stronger articulation agreements between districts and universities could help solve this problem, particularly with the advent of distance learning technology.

***Alternate certification processes could help encourage teachers with leadership potential pursue principal certification.***

While several factors may contribute to the difficulty districts experience when hiring principals, the certification process itself may discourage teachers from seeking to become principals.<sup>5</sup> Currently, it takes several years for teachers to acquire the additional education and district-level training needed for principal certification. Some educators expressed an interest in reducing certification requirements in certain situations, which would reduce the time it takes for teachers to become certified as principals and encourage persons with strong leadership potential to pursue certification. While the commissioner of Education has broad authority to waive certain provisions of law that relate to instruction and school operations, Florida statutes do not address the conditions under which the Commissioner or school districts may waive specific principal certification requirements.<sup>6</sup>

Most (84%) of the principals surveyed indicated that under certain circumstances districts should be able to make exceptions to one or more certification requirements if a person had K-12 teaching experience. While support for waiving certification requirements for individuals with no K-12 teaching experience was considerably less, half of the principals surveyed believed that districts should be able to waive selected

certification requirements for these individuals in certain situations. In addition, human resource supervisors surveyed generally supported shortening the length of time it takes to complete the district-level human resource training program.

Furthermore, Florida's certification requirements may unnecessarily extend the time it takes for some individuals to be employed as principals. For instance, Florida law does not provide for the immediate full certification of principals certified out-of-state; these individuals must serve in an interim capacity in the employing district for one year. In addition, the law requires teachers with advanced degrees in fields other than educational leadership to obtain additional coursework prior to being certified. As a result, such persons can be discouraged from moving to Florida or pursuing certification.

Establishing alternatives for the certification of principals may accelerate the certification process for these individuals and attract individuals to school administration who traditionally might not be considered. For example, a study by the National Association of State Boards of Education concludes that schools in inner cities, rural areas, and those serving disadvantaged children that find it particularly difficult to attract high-quality principals may be most helped by the creation of alternative certification routes. The October 1999 study describes an alternative principal certification program in Philadelphia that enables teachers who complete two prescribed internships, an applied research project, and a performance assessment to serve as principals. The requirements associated with alternative certification in Texas are considerably more extensive and include that candidates hold a master's degree (in any field) and have two years of teaching experience.

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<sup>5</sup> Survey respondents and those interviewed identified many reasons they believe teachers may not pursue principal certification such as pay level, increased accountability, and workload. However, this review focused on issues specific to the principal certification process.

<sup>6</sup> Section 229.592(9), F.S., provides the Commissioner of Education authority to waive provisions of law including those related to principal certification. These waivers are not for the purpose of exempting certification requirements for specific individuals but for the purpose of facilitating broad innovative practices, must be justified, and are temporary. In addition, currently school districts do not have authority to grant waivers to specific certification requirements.

## Conclusions and Recommendations —

### *Substantially amend the Management Training Act*

We concluded that the Management Training Act should be substantially revised. The Council on Educational Management, if active, would provide a useful mechanism for obtaining broad-based stakeholder input on issues needed for the development of strong and competent school managers. We recommend that the Legislature retain the function of the council but amend the Management Training Act to meet as a task force at the discretion of the Commissioner of Education. This task force should be periodically convened to address issues such as updating the principal competencies and addressing barriers to meeting the intent of the Management Training Act. Alternatively, if the Legislature chooses to eliminate the council and transfer all its functions to the Department of Education, we recommend that the Legislature direct the department to obtain broad input of the stakeholder groups specified for council membership when considering recommendations for updating the principal competencies or changing certification requirements.

In addition, we recommend that the Legislature assign current council duties for oversight of the principal certification and training processes, including selection and recruitment criteria, competencies, methods of evaluation, and alignment with state educational reform initiatives to the Department of Education.

We also recommend that statutory authorization for the Center for Interdisciplinary Advanced Graduate Study and the Academy for School Leaders be eliminated, as the functions of these entities,

which no longer exist, have been assumed by other entities such as school districts.

### *Increase coordination and cooperation between school districts and colleges of education*

School district and university articulation agreements have not been a focal point in the overall system for principal education and training programs as envisioned by the Management Training Act. To strengthen these linkages, we recommend that the Legislature require specific articulation agreements between school districts and universities. Strong articulation agreements would help ensure that education leadership programs are current, sufficiently rigorous, readily accessible, and closely aligned with district management training programs.

We recommend that the Legislature assign specific responsibility for developing articulation agreement guidelines, including the issues that should be addressed in the agreements, to the department task force that replaces the Council on Educational Management. These guidelines should be updated as needed to ensure that strong, cooperative relationships exist between universities and districts. Particular attention should be paid to using distance learning, developing university practicums and field experiences, and increasing the number of university courses offered on evenings and weekends and in locations closer to smaller, remote school districts. The effectiveness of these efforts should be measured as part of the principal training program approval process and college of education educational leadership programs.

We also recommend that the district principal training plan review process be expanded to assess implementation and effectiveness of coordination, partnerships, and cooperation between the school district and the universities and that current plans

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address weaknesses identified and opportunities for improvement.

### ***Address barriers that currently make it difficult to satisfy principal certification requirements in a timely manner***

Although the Management Training Act is designed to ensure that Florida schools are staffed by qualified, high-performing administrators, some districts are experiencing difficulty filling open principal positions. Improving the coordination and cooperation between school districts and colleges of education may resolve some of these problems. In addition, the Legislature may wish to consider changes to the current

certification process to provide school districts greater flexibility in hiring principals. These changes include authorizing waivers to selected certification requirements, alternative routes of certification, and employment of non-certified individuals with strong leadership skills to serve as principals.<sup>7</sup> However, it will be important to ensure that such changes also provide sufficient safeguards to ensure that only qualified individuals with the skills needed to be effective school leaders become school principals. Exhibit 1 discusses some of these options.

<sup>7</sup> These options could be authorized under the provisions of s. 229.592(9), F.S.

## **Exhibit 1 Policy Options for Changes to Florida's Current Principal Certification Requirements**

Policy Option	Discussion
No changes	Florida's current principal certification requirements establish statewide standards for principal certification including advanced education, budget knowledge, and management and leadership skills. However, some school districts have difficulty hiring individuals for hard-to-staff positions.
Allow districts to apply to the Commissioner of Education for a waiver to specific principal certification requirements.	Under this option, the Legislature would identify the conditions under which the Commissioner of Education could waive certain requirements for the certification of individuals on a case by case basis. This option would retain statewide certification and provide districts with the ability to attain waivers to selected requirements when trying to fill hard-to-staff positions or experiencing critical principal shortages. This option also may ensure uniformity, state control, and oversight of waiver decisions since the Commissioner of Education would review each request prior to approval.
Allow districts to waive specific principal certification requirements.	Under this option, the Legislature would identify the conditions under which school districts could waive certain requirements for the certification of individuals on a case by case basis. This option would retain statewide certification and provide districts with the ability to waive selected requirements when trying to fill hard-to-staff positions or experiencing critical principal shortages. However, this option may not ensure uniformity, state control, and oversight of waiver decisions since each district would have the authority to make exceptions.
Allow districts to hire individuals who do not meet current requirements.	Under this option, the Legislature would identify the conditions under which school districts could hire individuals as principal who demonstrate strong leadership skills but do not meet current certification requirements. If the Legislature chooses this option, it could direct the Commissioner of Education to convene the task force that replaces the Council on Educational Management to design and recommend a pilot project prior to its implementation. The task force's recommendations should identify the conditions under which the option should be applied, address how individuals would demonstrate strong leadership skills, identify minimum criteria (e.g., fingerprinting) these individuals must meet, determine whether limits should be placed on the number of non-certified individuals hired, and establish a review process prior to the project's expansion or discontinuation.





FLORIDA DEPARTMENT OF EDUCATION  
TALLAHASSEE, FLORIDA 32399-0400

Tom Gallagher

Commissioner

January 14, 2000

John W. Turcotte, Director  
The Florida Legislature  
Office of Program Policy Analysis and Government Accountability  
111 West Madison Street  
Room 312 Claude Pepper Building  
Tallahassee, Florida 32399

Re: Report on the Review of Management Training Act, dated December 1999

Dear Mr. Turcotte:

The Department of Education is pleased to provide you with a response to the recommendations made by the Office of Program Policy Analysis and Government Accountability in the review of the Management Training Act, s. 231.087, Florida Statutes. First and most importantly, we appreciate the efforts of your office for the careful review and thoughtful recommendations reported. We in the Department are committed to enhancing the services we provide to our customers and rely on data from the field so that we can target our improvement efforts appropriately.

In general, we are in accord with your findings, support your conclusions and are in agreement with the recommendations. We are committed to exploring ways to streamline the certification process for educators, eliminating barriers and increasing the supply of high performing teachers and school administrators.

**Recommendation:** *Although the Management Training Act has not been fully implemented, most of its major directives either have been accomplished or assumed by the Department of Education. The act should be substantially revised to reflect current needs.*

**Response:** We support the recommendation for establishing a Task Force to be appointed by the Commissioner of Education, which will include key stakeholder groups, to address issues regarding the recruitment, preparation, certification and professional development of school administrators. We believe that convening a Task Force periodically will provide us with necessary input for improving services and will assist us with our reform efforts in this area. In addition, we support the suggestion that current council duties for the oversight of principal certification, training and recruitment processes be reassigned to the Department. Over the past several years we have provided

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services in these areas to school districts and will willingly accept the responsibilities previously held by the Council. Having the authority to assume these responsibilities would eliminate duplicity of efforts and afford us the opportunities to revise and strengthen the effective operations of these programs so that they are in alignment with other state initiatives. Furthermore, eliminating the authorization for the Center and Academy is also supported as we too agree that these functions have been assumed by school districts and other entities. In fact, the Department recently conducted an evaluation of training programs for principals to determine customer satisfaction levels with the existing programs and to identify areas of need in order to further develop resources for the professional development of both new and experienced principals. This report was provided to your Office for review in early December 1999.

**Recommendation:** *Increase the coordination and cooperation between school districts and colleges of education.*

**Response:** Increasing the coordination and cooperation between school districts and universities is essential if we are to be successful in efforts to increase the supply of qualified assistant principals and principals. Exploring possibilities to initiate articulation agreements which will strengthen university and district relationships through the Task Force is a viable option for resolving this issue. Furthermore, we support the suggestion of developing alternate delivery systems using varied technologies and establishing internships and mentoring programs for the preparation of principals as well as for their continued professional development. The Department has committed resources in addition to establishing partnerships for the development of professional development resources for principals in the areas of: technology, collection and analysis of student gains data, and leadership using web-based alternatives. We are in accord with the recommendation made concerning district principal training plans. Expansion and revision of the review process for district principal training plans is necessary so that this process can become aligned with new legislative requirements regarding district professional development systems for instructional personnel. This alignment will increase accountability for administrators in terms of student performance based outcomes.

**Recommendation:** *Address barriers that currently make it difficult to satisfy principal certification requirements in a timely manner.*

**Response:** Changes to the current certification process to provide more flexibility are warranted. However, we offer an alternate approach to the proposed path of waivers. We propose the repeal of Florida Statute 231.0861 Principals and assistant principals; selection. Repealing this statute would increase flexibility in general hiring practices. In addition, this change will enable districts to hire qualified out-of-state applicants with

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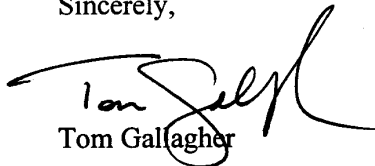
fewer restrictions. Furthermore, streamlining the certification process for administrators is recommended and is close to becoming a reality. In a recent review of Florida educator certification processes it was recommended that we collapse the three existing certification coverages for administrators into one coverage for school leadership. If this recommendation is adopted, then a natural course of action will be to review state board rules that govern the certification of administrators and establish new requirements and assessments of competencies.

The Department of Education is currently planning initiatives in the areas of recruitment, and professional development of educators that will address the recommendations contained in the Report on the Review of the Management Training Act prepared by your office. Efforts to better serve our customers are currently underway. The following is a sampling of several recruitment and professional development initiatives that are indicative of our commitment to continuous quality improvement:

- ◆ the development of an on-line interviewing system,
- ◆ streamlining the certification process by decreasing the number of coverages,
- ◆ requesting the repeal of certification laws which are barriers and
- ◆ creating web-based professional development resources for educators in Florida.

We appreciate your assistance in providing us with information to target our improvement efforts.

Sincerely,



Tom Gallagher

TG:agb

# The Florida Legislature

## Office of Program Policy Analysis and Government Accountability



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