



Partner Alliance for Safer Schools

WHITE PAPER: From Concept to Completion of a School Security Project

The volunteers who make up the Partner Alliance for Safer Schools (PASS) bring together their research and expertise from the education, public safety, and industry communities to develop and support a coordinated approach to make effective use of proven security practices for schools. The PASS team is also dedicated to developing white papers on specific, school-safety topics.

The content in these white papers may point to specific products, brands, or organizations as illustrations of how certain safety and security measures are implemented. PASS does not endorse specific products or brands. Together, the volunteers and partners of the PASS share a single vision: making all schools safer is both achievable and urgently needed.

AUTHORS

Contributing Authors: Desire S. Bayne, Scott Clark, Jim Crumbley, R. Leslie Nichols

KEY TOPIC

School safety and security project planning, implementation, and handoff.

PROBLEM SOLVED

Provides a structured approach for moving a school safety project from assessment and planning through execution and long-term operational handoff.

RELEVANT PASS GUIDELINES SECTION

- **Introduction:** Scope; Structure of the PASS Guidelines; Baseline Practices and Obligations; Recommended Uses; Risk Assessment — A Prerequisite; Layers of Protection; Safety and Security Components; Using the PASS Guidelines to Formulate a Comprehensive Security Plan

- **III. District-Wide Layer**
- **IV. Digital Infrastructure Layer**
- **V. Campus Perimeter Layer**
- **VI. Building Perimeter Layer**
- **VII. Classroom/Interior Layer**

MOST RELEVANT FOR

- K-12 security directors
- School administrators
- Consultants and integrators
- Facilities leaders and safety professionals

TIME TO READ

Approximately 15 minutes

Executive Summary

This white paper, based on the 2026 Summer Camp Webinar series, offers a practical roadmap to guide school administrators, consultants, and integrators from initial safety concepts to final project completion. School safety should be grounded in a strategic, visible framework rather than the latest sales pitch or technology trend.

The paper explains how to use the PASS Guidelines to objectively assess risks, prioritize limited resources, and build a unified, layered security strategy. It identifies common project failure points and introduces the “5 Ws and an H” framework: why, what, where, who, when, and how — for developing a practical project plan.

It then outlines the PASS four-phase project model: assessment, vision, execution, and handoff. Together, these phases provide a structured life cycle for moving from a written risk assessment report to a project charter, implementation, and school safety operations manual, with the ultimate goal of increasing a school’s capacity to protect people.

Why This Topic Matters

PASS is committed to protecting the whole child by promoting safe, secure, and supportive learning environments. This means balancing:

- Security
- Fire and life safety
- Accessibility
- Everyday functionality

School safety projects involve more than installing hardware or deploying software. They may prevent harm, reduce risk, improve preparedness, strengthen response capabilities, support recovery, improve behavior, strengthen coordination, or make an existing safety system more reliable.

Learning Objectives

By the end of this white paper, readers should be able to:

- Define the purpose and scope of a school safety and security project.
 - Identify common failure points that can derail a security project.
 - Structure a project plan by using the 5 Ws and an H.
 - Develop a problem statement and business case tied to district safety goals.
 - Use the responsible, accountable, consulted, and informed (RACI) framework to define project roles and responsibilities.
 - Build a realistic project timeline with key milestones.
 - Develop an execution strategy, budget allocation, and risk mitigation plan.
 - Apply the four-phase project model from assessment through handoff.
 - Establish testing, training, documentation, maintenance, and sustainability practices for long-term success.
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Section 1: What is so great about a plan?

“By failing to prepare, you are preparing to fail.” — Benjamin Franklin

A lack of planning and preparation is the primary reason security projects fail, stall, or deliver fewer positive results than expected. Your project plan grows out of your vision and answers two important questions:

1. **Where do you want to go?**

2. How will you get there?

What are the common failure points?

Implementing your district's or school's vision for safety has many potential pitfalls and failure points. One of the most common challenges is underestimating the complexity involved in a school security project. A project may entail much more than physical installations. Training, policy development, stakeholder buy-in, ongoing maintenance, and the district's ability to sustain the improvement must all be considered at the front end of the project.

A stalled project can create inconsistency from one building to another, which can make it difficult to achieve the original vision. Projects that lose momentum can lose trust, and loss of trust among stakeholders can ultimately compromise future budget support.

The key for administrators is to control what they can control. The adage **"do your job"** comes to mind. When we focus on what we can control and prepare for inevitable challenges, we create an environment where success is not only attainable but, in many ways, inevitable.

1. **Unclear scope** — Clearly define what you are trying to achieve and how to get there.
2. **Reactive decisions** — Instead of following the district's safety goals and a multi-year plan, incident-driven decisions made under pressure to "do something" rarely deliver the results decision-makers hoped for.
3. **Findings that do not become action** — Assessment findings of weaknesses that do not result in quantifiable action are a roadblock in themselves.
4. **Incomplete operational handoff** — If mishandled, the operational handoff can turn a positive initiative into a wasted opportunity to achieve lasting results.
5. **Weak maintenance and ongoing training plans** — Maintaining the health of a system or training programs requires ongoing checks and system tweaks.

Section 2: The Five Ws and an H

Each project plan should begin with answering the 5 Ws and an H.

- **Why?**
- **What?**
- **Where?**
- **Who?**
- **When?**
- **How?**

The 5 Ws and an H are not intended to be a one-time exercise. As the project plan is developed and implemented, it is wise to return to these questions and adjust your planning as necessary. Together, they create a repeatable process template that can be applied to projects of different sizes and complexity. Once a district establishes a process that works, the same principles can be applied consistently to future projects, helping create greater consistency and predictability across the organization.

Why?

As the project leader develops the plan, the “why” should be clearly articulated through a problem statement and a business case. The problem statement and business case can be brief, but they should include measurable results and, critically, always point back to the district’s safety goals, which are to increase the school’s capacity to protect people. The methods used to accomplish that goal may include the things you install, build, train, your policy, and other operational improvements. The “why” goes beyond general importance and drives you toward the other five questions.

The “why” should also reflect the culture and expectations of the school district. A successful security strategy must improve safety while supporting the environment the district is trying to create. It shouldn’t operate in a silo, but rather, work to uphold the district’s broader educational mission, culture, and leadership expectations.

What?

Reputations are built on what you do, or, perhaps even more importantly, what you don’t do or fail to do. When you clearly outline your goals and develop scope, deliverables, and success metrics, your reputation and the safety of your students and staff are built together.

The “what” of your plan should detail the micro-elements of the PROJECT GOAL that support the broader district goals and, as necessary, include standards, regulations, and community norms.

The “what” of your plan should also support the PROBLEM STATEMENT and BUSINESS CASE outlined in the “why.”

Where?

The “where” is not simply the location of the project installation. Because you have so much information that must be gathered, sifted, shared, reevaluated, and prioritized, in this context, “where” also refers to the digital tools and platforms you will use to keep the project moving.

The “where” includes gathering answers to the following questions.

- What software platform will drive your documentation and generate reports for your team?

- Where will that detail be stored so your team and stakeholders can access it for their deliverables and informational updates?
- As is most often the case, if your project is at one location and stakeholders work at other locations, where do the update meetings take place?

The tools do not need to be complicated. Shared spreadsheets, project management platforms, shared documents, and virtual meetings can be an effective way to keep communication open, and information organized and accessible. These tools will depend on the size of the district and project.

Shorter meetings, with a sharper scope, can also help maintain accountability while reducing the burden on stakeholders. In other words, “where” can also relate to how you will meet, document, and implement the “what.”

Who?

Building the team is the most important step you can take when preparing to plan. No matter your level of expertise or capabilities, you can only go so far alone. Pulling in resources and support from facilities, human resources, instructional support, the community, and law enforcement will strengthen your plan and result in a better deliverable than going it alone.

But how do you identify “who” you need? The RACI framework can help you structure your team and determine the level of support needed for a successful project rollout. Remember that identifying team members goes beyond listing names; you must determine the specific role each person will play. Early stakeholder involvement can lead to an organic discovery of project champions. Involving key participants during the planning stage gives them the opportunity to identify concerns, contribute ideas, and understand the reasoning behind project decisions before the project is deeply underway. This can create a greater sense of ownership and pride in their work once the measures of success are determined. The RACI framework breaks this down into four categories:

- **R — Responsible:** Who is doing the work or assigned to the task?
- **A — Accountable:** Who will take accountability if this goes wrong? Who has the authority to make decisions?
- **C — Consulted:** Who should provide input on the project or task? Who are the stakeholders who need to be aware of and weigh in on the project strategy?
- **I — Informed:** Whose job and work depend on the successful completion of the project or task? Who needs to be routinely updated?

Administrators may find it helpful to generate a RACI matrix that details each individual’s level of involvement with specific milestones and deliverables. Using [this type of tool](#) can keep you

and the project on track. Structured tools also promote consistency. When responsibilities, deliverables, and accountability are documented in one place, team members have a common reference point for determining who is responsible for what. This streamlined approach becomes especially valuable when the same process is applied across multiple projects or buildings.

When?

Building a realistic timeline with key milestones is critical. The timeline keeps you, your vendors, and the support team involved in your project on target.

Key questions to ask yourself and your team about timing include the following:

1. When is the budget due?
2. When is the proposed go-live date and “why” is this important?
3. When will the departments providing ancillary support, such as IT and facilities, complete their work?
4. When do stakeholders and other administrators (see RACI) need to be updated?
5. When can the work be performed?
6. When can training be held?

How?

Success comes from the grind of making a plan work, not from the creative spark that goes into building the plan. It details the day-to-day installation, implementation, quality controls, and training required to successfully complete a project.

The HOW outlines the execution strategy, budget allocation, and risk mitigation plans required for final delivery. There are generally three ways to execute a project or project component: outsource it, perform it internally, or collaborate with others. The best option depends on the district’s resources, expertise, budget, timeline, and the complexity of the work. This applies not only to physical installations but also to **training, policy, operations, buildings, and systems**.

Decisions and details outlined in the 5 Ws culminate in the “how” as a comprehensive plan required to complete the project.

How long will the project take?

- This detail, fleshed out, becomes part of your “when”.
- Does the project require phases, testing, or detailed training for end users?

How will the project be paid for?

- Is the project funded by a grant? If so, are there requirements for timing, billing, and reporting?

- Is the project budget controlled by the administrator or by another department, such as IT or Facilities? If so, are there different purchasing policies or requirements that could affect the budget cycle and project timeline?

How will the physical work be performed?

- Will this work impact teaching? If so, can the work be performed after hours?
- Is it possible that other departments might be affected by the work being performed? For instance, work in IT closets can affect the site's network.
- How will vendors access the site? Can they be issued keys and alarm codes?

How detailed and difficult is the operational handoff?

- Can training be conducted remotely?
- Would a “train-the-trainer” approach work for this project, or is on-site training and observation required?
- Can the site contacts administer the completed project, or do they need ongoing support and system management?

These items related to “how” are driven by “who” and touch each of the Ws. “How” is the meat of what you are trying to accomplish to converge with the “what” and “when.”

The 5 Ws and an H are not independent steps or silos. They are interconnected elements of the same project plan. As new information is discovered, the team may need to revisit an earlier decision and adjust another element of the plan. For example, how a project will be installed may affect when work can begin, while new information discovered during planning may change the scope, timeline, or execution strategy.

Section 3: The Four Phase Project Model

PASS has identified four basic phases for every project. The four-phase model is intentionally minimalist. More complex projects may require additional phases or more detailed project management processes, but these four phases provide a simple framework for organizing even complex initiatives into clear stages with defined deliverables. Each phase answers a practical question and produces a tangible deliverable.

1. **Assessment** → Written Risk Assessment Report
2. **Vision** → Project Charter
3. **Execution** → Priorities, purchasing policy, implementation strategies, and timing
4. **Handoff** → School Safety Operations Manual

The four-phase model is your map. Without a map, how do you know you've arrived?

A successful school safety initiative requires a disciplined, multi-phase approach. Transitioning from reactive measures to a sustainable culture of safety requires a structured life cycle: assessment, chartering, execution, and handoff.

Phase 1: Written Assessment Report

The assessment report forms the basis of the project charter. It must provide a comprehensive, evidence-based review of the district's current safety posture.

- **Standards and Benchmarking:** Detail the standards applied — such as PASS Guidelines or legislative requirements — to ensure the project is grounded in industry best practices.
- **Comprehensive Risk Profile:** Move beyond active-threat scenarios to document the full spectrum of known risks, including routine operational hazards, technological gaps, and environmental vulnerabilities.
- **Actionable Recommendations:** Define the specific technological, operational, and cultural improvements needed to mitigate identified concerns.

Phase 2: Project Charter

The project charter is the foundational document that formally launches the initiative. It promotes accountability, secures necessary resources, and establishes the initial foundation for stakeholder buy-in around the vision for success. Additionally, the charter helps protect the district by documenting the thoughtful scope of a security project, its vision, relationship to district goals, and rationale for the project. Ultimately, the charter provides an important record of the decisions and considerations that shaped the project.

- **Purpose and Goals:** Clearly articulate the project's "why" and define quantifiable success metrics.
- **Scope:** Define the project's boundaries, including its impact on costs, timelines, and the future state of district safety.
- **Roles and Responsibilities:** Establish clear accountability, often mapped using a RACI matrix, to ensure all stakeholders understand their specific roles.
- **Strategic Overview:** Outline the primary milestones, budget requirements, and how the project integrates physical, operational, and cultural components into a unified safety mission.

Phase 3: Project Execution

This phase turns the approved charter into action, requiring rigorous management of resources and stakeholders to ensure adherence to the project goals.

- **Project Coordination:** Manage the integration of contractors, staff, and public safety partners to ensure seamless communication and clearly defined responsibilities.
- **Resource and Schedule Management:** Proactively track milestones, costs, and timelines while maintaining a formal process for documenting and approving changes.
- **Implementation:** Execute physical, technological, and cultural improvements while carefully monitoring their impact on daily operations.
- **Quality and Risk Control:** Verify all work against established standards. Continuously monitor for new risks or unintended consequences through inspections and progress reviews.
- **Documentation:** Maintain comprehensive records of decisions, changes, and milestones to ensure accountability and to facilitate the project's eventual transition.

Phase 4: Project Handoff

Project handoff marks the transition from implementation to long-term operation. This phase ensures the project is not just “finished” but fully functional and integrated into the district’s ongoing safety program.

- **Completion and Acceptance:** Confirm that all work meets the requirements outlined in the charter and obtain formal signoff from the project owner.
- **Testing and Operational Readiness:** Conduct rigorous testing of equipment, policies, and procedures under realistic conditions. Ensure all staff are trained and understand their roles in the new environment.
- **Transfer of Responsibility:** Formalize the handoff by providing all essential documentation (manuals, warranties, records) and clearly identifying the personnel responsible for ongoing oversight.
- **Sustainability and Review:** Establish a long-term maintenance and sustainability plan to prevent the degradation of safety systems. Conduct a postproject review to document lessons learned and to evaluate whether the project met its established goals.

Conclusion

Implementing these four phases — assessment, chartering, execution, and handoff — is more than a project management exercise; it is the foundation of a resilient safety culture. By shifting from reactive, technology-only responses to a deliberate, life cycle-based strategy, districts ensure that security measures are not merely deployed but also maintained, tested, and fully integrated into the daily fabric of the school environment.

Building a resilient safety culture is an ongoing commitment that extends well beyond a single project or installation. By adopting the structured life cycle outlined in this document —

transitioning from rigorous assessment to clear chartering, disciplined execution, and formalized handoff — districts can shift from reactive, fragmented safety efforts to a sustainable, long-term model.

Resources

- PASS Guidelines and Checklist
 - Homeland Security recommendations
 - State law and applicable requirements
 - Community norms
 - www.passk12.org
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Take the Next Step

To begin developing your comprehensive security roadmap, I encourage you to leverage the resources from the Partner Alliance for Safer Schools (PASS). The PASS School Safety and Security Guidelines and the accompanying PASS Checklist/Assessment Tool are designed to help you navigate today's complex safety challenges by providing a framework to assess your current state, prioritize your needs, and make evidence-based decisions about your security investments.

Don't navigate these challenges alone. Visit www.passk12.org to download the latest edition of the Guidelines and the editable Checklist. These tools will help you define your specific path to a safer, more secure environment for your students, staff, and community.
