



THE GOVERNOR JOHN ENGLER
CENTER FOR CHARTER SCHOOLS
CENTRAL MICHIGAN UNIVERSITY



STRATEGIC PLANNING

2016 NACSA LEADERSHIP CONFERENCE | OCTOBER 26, 2016

PRESENTERS

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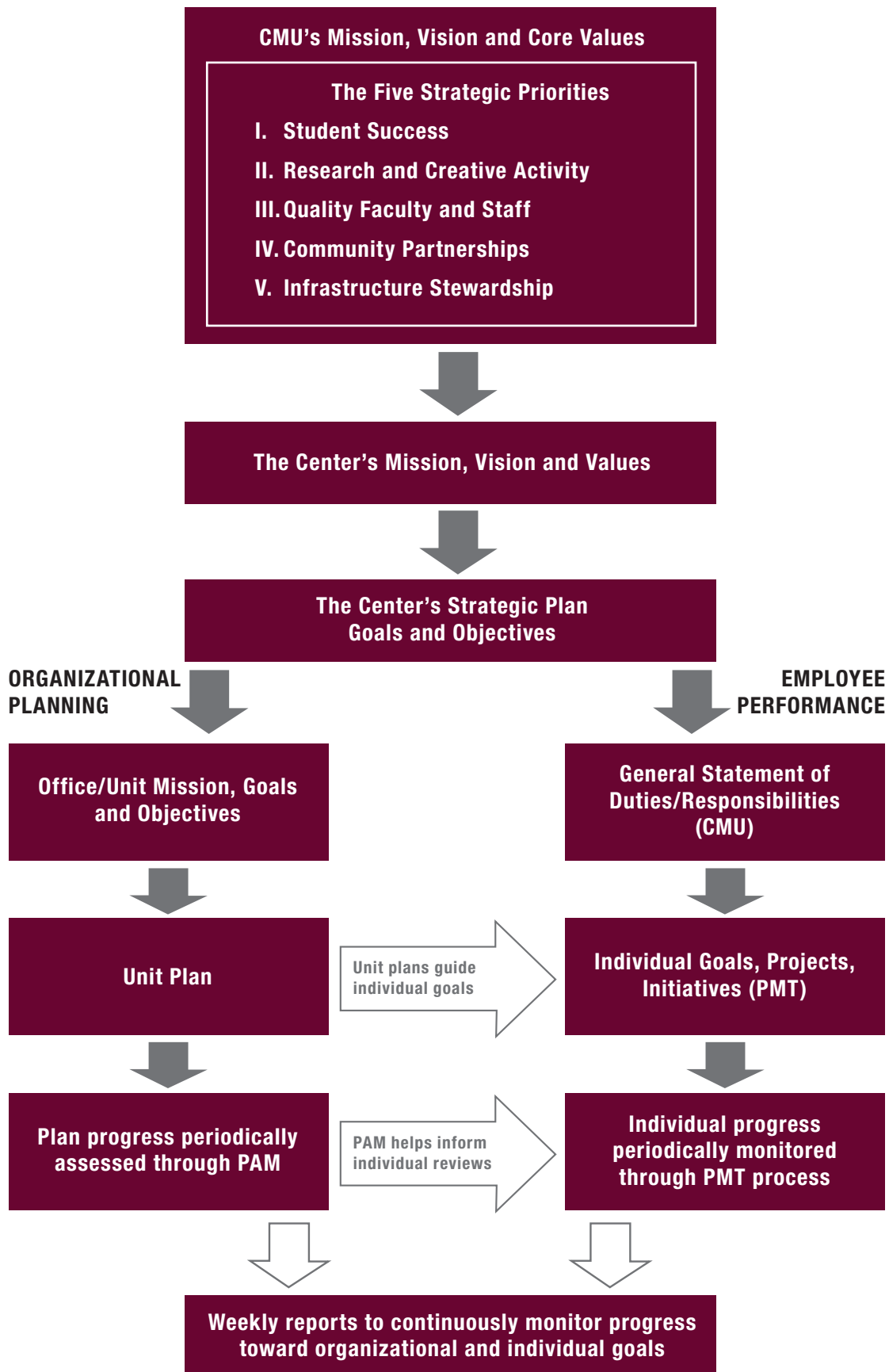
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CMU AND THE CENTER'S STRATEGIC PLAN

HOW THEY RELATE



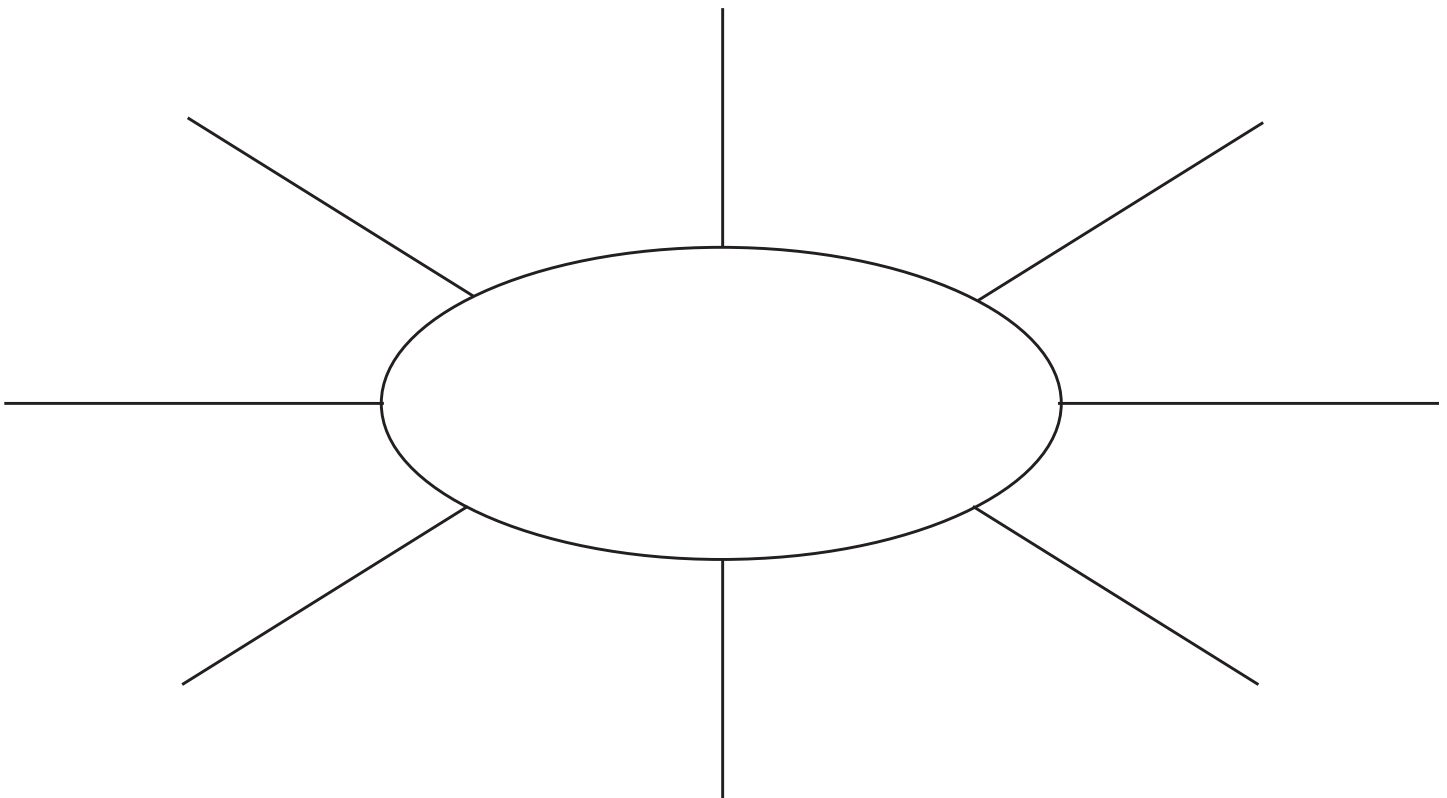
MISSION, VISION, VALUES

MISSION:

VISION:

VALUES:

EXAMINING THE MISSION



ORGANIZATIONAL GOAL PLANNING MAP

CMU EXAMPLE

MISSION: To transform public education through accountability, innovation and access to quality education for all students.

VISION: We envision a diverse and dynamic public education marketplace that fosters academic excellence for all children.

VALUES: Integrity | Respect | Compassion | Inclusiveness | Social Responsibility | Excellence | Innovation

ORGANIZATIONAL GOALS

PORTFOLIO MANAGEMENT

Provide access for all students to a quality education and ensure that the educational option being offered is of the highest quality.

STRATEGIC PARTNERSHIPS

Build relationships and establish partnerships that will create opportunities to further the Center's mission, increase state and national visibility, and further authorizing and oversight best practices throughout the state and nation.

ACADEMIC SUPPORT

Provide expert academic support to increase overall academic performance of CMU-authorized schools.

WILDLY IMPORTANT GOALS (WIG)

1. Develop a dashboard to monitor performance at the portfolio and academy level.
2. Evaluate the impact of academy specific support/oversight strategy.
3. Explore the opportunity to formalize the integration of quantitative and qualitative data for unit wide decision-making around staff intervention, supports and incentives that aim to fulfill the practice of differentiated oversight.

WIG

1. Establish partnerships with five high quality operators by June 30, 2017 that will positively impact our portfolio's performance.
2. Identify and agree upon a critical issue to educate, discuss with and advocate to state and national education stakeholders that positions the Center as a thought leader in public education and enhances our ability to impact public education.
3. Advance identified initiatives that stem from partnerships with the University and leverage CMU's resources in a way that will promote and ensure value add to our schools while increasing CMU's reputation as a leader in education.

WIG

1. Establish systems of measurement to formally track progress with Falcon Initiative schools to determine viability and long-term potential for continuation or expansion.
2. Utilizing research-based evidence in charter public school success, explore opportunities to provide support, technical assistance or facilitate the development of a school leadership learning platform.

COMMUNICATIONS

Develop and implement a communication and marketing strategy, incorporating the Center's branding proposal, that targets audiences and stakeholders while positioning the Center as the authority and resource on charter public schools, charter authorizing and quality public education choices.

WIG

1. Develop a plan to target stakeholders with key messages to position the Center as setting the standards for charter public school authorizing and charter public school innovation, education, choice and accountability.
2. Develop marketing/communications materials that target key audiences and stakeholders about the Center, specific programs, services and activities.
3. Utilizing the website, explore the short and long-term potential for designing and embedding a resource library that would provide access to key resources, possible module-simulated training pathways and resource referral to multiple audiences and stakeholders.

DATA

Develop critical data elements and analytical practices that provide for effective oversight, accountability and decision-making that yields improved organizational performance at the Center and fosters improved outcomes within CMU-authorized schools.

WIG

1. Design and implement a system of organizational evaluation that will allow for quantitative and qualitative measurement and monitoring of program and initiative effectiveness Center wide.
2. Using advanced statistical methodology and reporting, create and provide reporting templates and supplemental tools that will assist the Center and schools in understanding truly significant successes, disparities and trends in academic data.
3. Relying upon educational research and best practice resources, advance the understanding of trends in data analysis and data utility that will ensure the Center remains at the forefront of analytical practice.

LEADER DEVELOPMENT AND ORGANIZATIONAL CAPACITY

Recruit, retain and develop a team of diverse and passionate professionals who are committed to the mission of the Center.

WIG

1. Identify and implement ongoing opportunities for moving staff towards the categorization of Level 5 leadership.
2. Evolve targeted efforts in the areas of staff orientation, development, engagement and satisfaction.

ORGANIZATIONAL GOAL PLANNING MAP

TEMPLATE

MISSION:

VISION:

VALUES:

ORGANIZATIONAL GOALS





CURRENT SITUATION

CURRENT SITUATION

CURRENT SITUATION

- WIG
- 1.
 - 2.
 - 3.

- WIG
- 1.
 - 2.
 - 3.

- WIG
- 1.
 - 2.
 - 3.

ORGANIZATIONAL GOAL PLANNING MAP

CHICAGO PUBLIC SCHOOLS EXAMPLE



STRATEGIC PRIORITY 1: Execute a rigorous authorization process that leads to an improved portfolio of schools

What are the significant milestones (e.g. actions, deliverables) for deep implementation of our Strategic Priority? What are the measurable outcomes?

SIGNIFICANT MILESTONES: ACTIONS & DELIVERABLES	RESPONSIBLE PARTY
New Schools RFP Conduct rigorous reviews Approve new high quality schools to open Executive final agreements Plan and launch 2017 RFP	
Restart Initiative Develop process Development and approval of policy Release RFP Identify and engage quality restart providers Engage with stakeholders Match providers with closing schools Execute final agreements	Elisa M. Botell
Renewal Launch renewal process Complete school evaluations including site visits and conduct comprehensive review/evaluation Renew high quality school operators Close low performing schools Execute final renewal agreements	Elisa M. Botell
Incubation Develop individualized plan for communication and engagement for schools opened within past 3 years Review of academic, financial, operational (compliance, staff turn-over, parent engagement/concerns, enrollment, STLS, EL, DL), Governance, CMO/EMO changes Quarterly check-ins and visits if needed	Yesica Rufino
School closure Engage consultant in process revisions Identify student options Execute wind down agreement Complete wind down process	Yesica Rufino
Strategy Alignment Clarification of high school and elementary district strategy Identification of areas in need of quality seats Aligned processes and communication	Mary Bradley

IMPLEMENTATION GOALS

- ❑ 100% of complete applications will undergo a rigorous review process.
- ❑ Identify 3 successful national operators that have an interest in Chicago for new schools.
- ❑ Identify and engage with 3 successful restart operators outside of Chicago and 3 Chicago operators interested in becoming a restart operator.
- ❑ Develop and implement plan for all schools that have opened within 3 years.
- ❑ A restart process will be developed and implementation will begin spring 2017.
- ❑ 100% of schools in renewal will undergo a rigorous review.
- ❑ The district strategy for both elementary and high school will be utilized when developing processes during the 2016-2017 school year.

IMPACT GOALS

- ❑ New schools approved in fall of 2016 will have an SQRP rating of 2+ or higher within 3 years of opening.
- ❑ Schools that have opened within past 3 years demonstrate strong academic, financial and operational foundations.
- ❑ Schools that undergo the restart process will have successful management and leadership transitions complete and in place by fall 2018 that results in improved academic performance throughout the two years of transition.
- ❑ The overall performance of the I&I portfolio will demonstrate an improvement in the educational outcomes of students over the next three years.

LEAD PARTNERS

- ❑ Accountability - Ryan Crosby, Calculate and provide annual SQRP ratings, two year averages and network averages
- ❑ Planning and Data Management - Jimm Dispensa, provide demographic data for new school approvals, school renewals and amendments to school agreements
- ❑ Office of College and Career Success - Molly Burke, assist with transition planning for students of closing schools
- ❑ Access and Enrollment - Katy Ellis, assist with identifying school options for students of closing schools
- ❑ Safety and Security - Jadine Chou, assess safety concerns for potential school closures and new schools

MEANS OF COLLABORATION

- ❑ Develop comprehensive project plans with specific timelines that are shared and communicated with team members
- ❑ Establish a cross functional team (per authorization process) with clear lines of responsibility and accountability
- ❑ Establish and meeting at regular check points throughout the process
- ❑ Formally document progress using the project plan
- ❑ Develop a high level dashboard to communicate relevant information to senior leadership

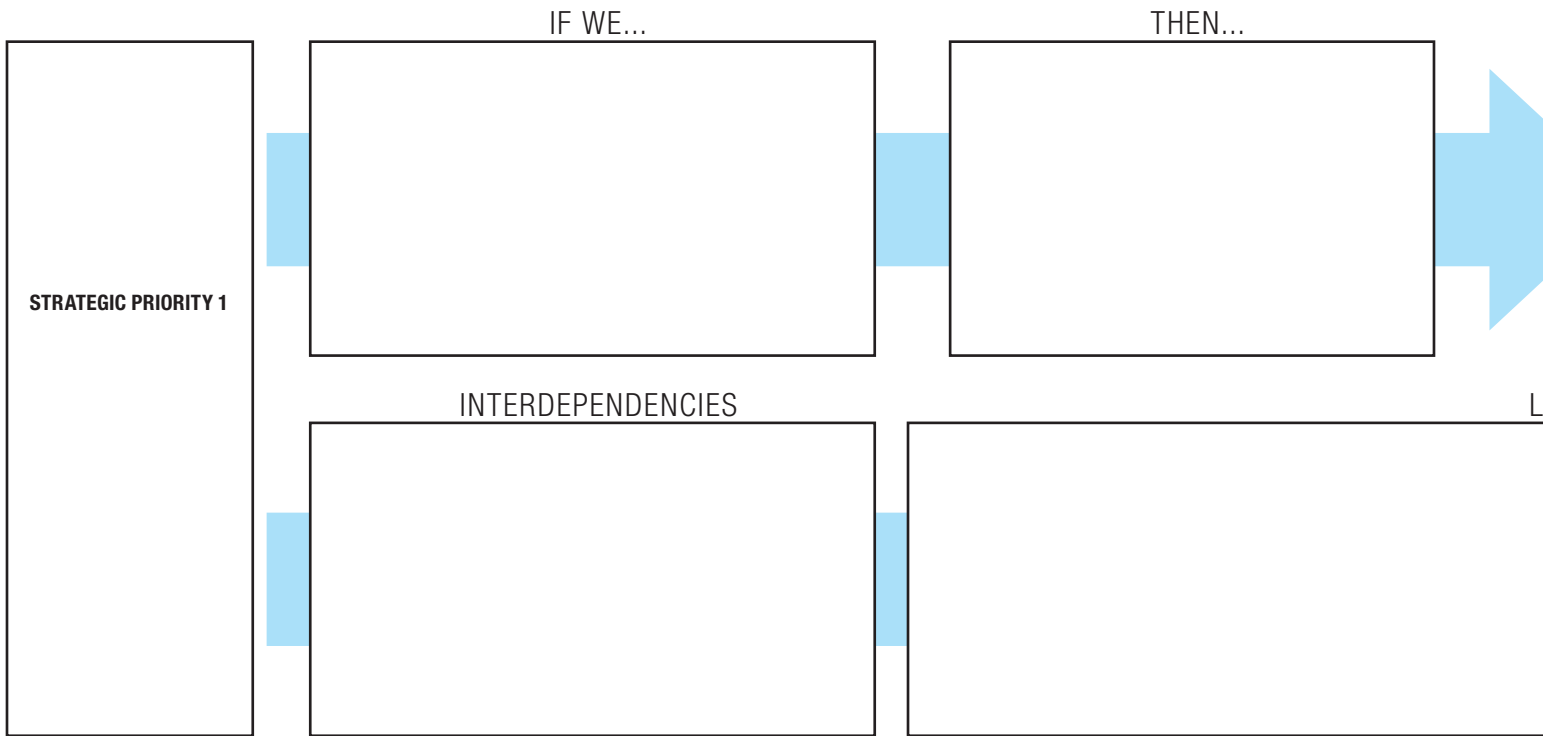
Improved portfolio of schools

Measurements of Implementation & Impact?

LEAD	TARGET START DATE	TARGET END DATE	BASELINE	CHECK-IN	CHECK-IN	CHECK-IN	FINAL STATUS
	April 2016	May 2017		FY16 Aug. 2016	FY16 Aug. 2016 FY17 Oct. 2016	Y16 Sept 2016 FY17 May 2017	
	Sept. 2016 Nov. 2016	July 2018		Oct. 2016	Jan. 2017	Mar. 2017	
	May 2016 Aug. 2016	Oct. 2016 Nov. 2016		June 2016 #1: Aug. 2016	#2: Aug.2016	#1: Sept. 2016	
Perez							
Perez	Nov. 2016 Oct. 2016	June 2017		Dec. 2016	Mar. 2017	May 2017	
	June 2016	June 2017		Sept. 2016	Jan. 2016	Mar. 2017	

ORGANIZATIONAL GOAL PLANNING MAP

TEMPLATE



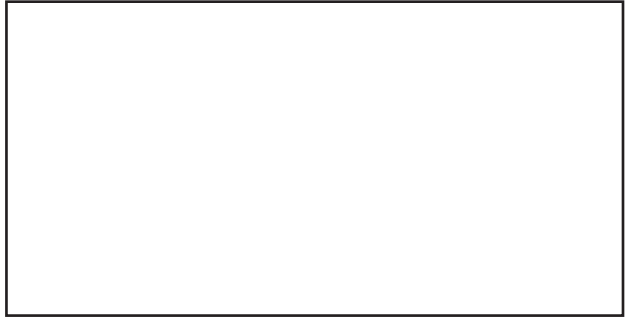
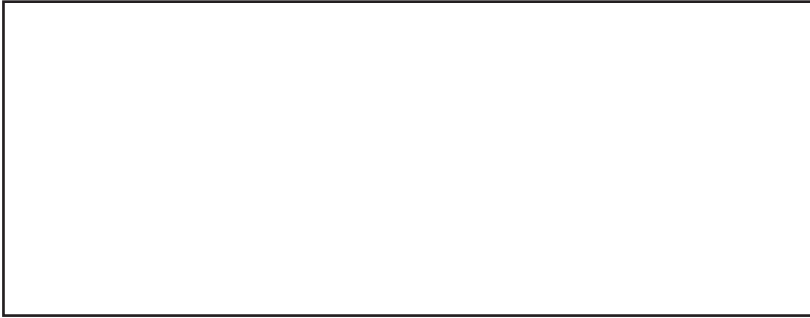
STRATEGIC PRIORITY 1:

What are the significant milestones (e.g. actions, deliverables) for deep implementation of our Strategic Priority? What are the me

SIGNIFICANT MILESTONES: ACTIONS & DELIVERABLES	RESPONSIBILITY

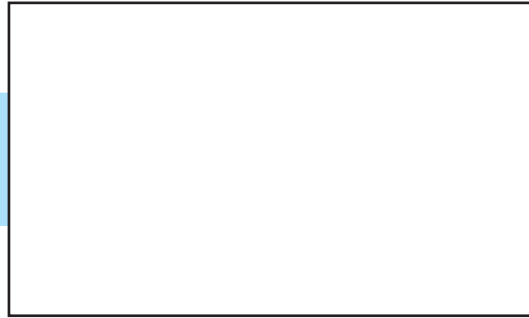
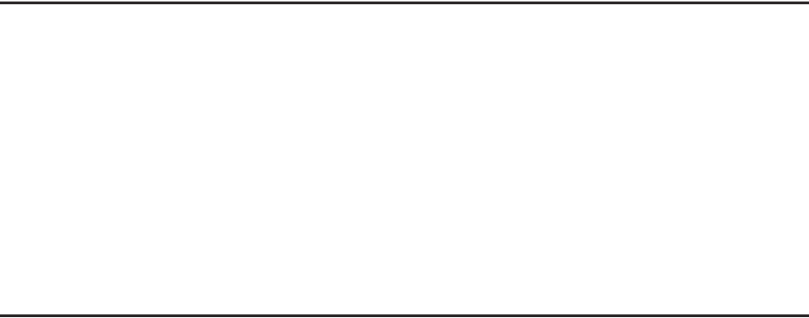
IMPLEMENTATION GOALS

IMPACT GOALS



LEAD PARTNERS

MEANS OF COLLABORATION



Measurements of Implementation & Impact?

RESPONSIBLE LEAD	TARGET START DATE	TARGET END DATE	BASELINE	CHECK-IN	CHECK-IN	CHECK-IN	FINAL STATUS

TRACKING TOOL

CHICAGO PUBLIC SCHOOLS EXAMPLE

	INDICATORS (KPIS)	TARGET
IMPLEMENTATION INDICATORS	Complete applications submitted will undergo a rigorous review process	100%
	# of successful Chicago and national operators identified and engaged	3 national operators (new schools) 6 Restart (3 existing & 3 new to Chicago)
IMPACT INDICATORS	% of schools in renewal that undergo a rigorous process	100%
	% of new schools with SQRP ratings of Level 2+ or higher after 3 years	100%
	% of school closures who became “restart schools”	1-2
	% increase in academic performance of entire I&I portfolio	Overall increase of 10% of level 2+ and higher schools

TRACKING TOOL

TEMPLATE

	INDICATORS (KPIS)	TARGET
IMPLEMENTATION INDICATORS		
IMPACT INDICATORS		

<i>SEP</i>	<i>OCT</i>	<i>NOV</i>	<i>DEC</i>	<i>JAN</i>	<i>FEB</i>	<i>MAR</i>	<i>APR</i>	<i>MAY</i>	<i>FINAL/EOY</i>
On-Track	On-Track								
Not On-Track	Not On-Track								
On-Track	On-Track								
N/A	Under Review								
N/A	N/A								
N/A	Under Review								

<i>SEP</i>	<i>OCT</i>	<i>NOV</i>	<i>DEC</i>	<i>JAN</i>	<i>FEB</i>	<i>MAR</i>	<i>APR</i>	<i>MAY</i>	<i>FINAL/EOY</i>

UNIT PLAN ASSESSMENT MATRIX (PAM) EXAMPLE

CHARTER ACCOUNTABILITY PROGRESS REPORT

Center Objective	PLAN Objective/Schedule of Deliverables	Completion Date	On-Time?	Unit Goal (Net Impact)	Metric (critical questions)	Overall
STANDARD OPERATING PROCEDURES						
6	1.1 Lead and Manage the School Operations Staff	30-Jun		Ensure that the School Operations Unit operates effectively to carry out the Unit PLAN through the implementation of sound business processes.	Does the School Operations team have the resources to perform high quality work that is valued and respected?	Through 1:1 continual review whether the team has the resources to perform high quality work that is valued and respected?
5	1.2 Develop and Maintain Charter Accountability Budget				Did the School Operations budget provide the necessary resources to fulfill the unit needs and were year-end expenditures within the approved amounts?	Funds will be utilized and Leadership budget.
5	1.3 Manage and Implement the associated Business Processes	30-Jun			Are business processes reviewed annually and updated, as necessary, in order to continually improve consistency and efficiencies within the unit?	At least 95% of processes reviewed and updated in accordance with the Center's schedule.
3, 5 MANAGE THE CONTRACT DEVELOPMENT PROCESS						
3, 5	2.1 Develop and Execute the Annual Re/Authorization Cycle	30-Jun		Ensure the timely and accurate execution of the Charter Contract (and Amendments) that will guide the relationship between the Center and the schools.	Were the Contracts executed properly, timely and accurately?	Contracts for 2015-2016 (13) plus amendments with a fall 2015
	2.2 Manage the Charter Contract Amendment Process	30-Jun			Were Contract Amendments executed properly, timely and accurately?	Contract amendments for 2015-2016 are being processed. Contract amendments will follow the business process (including adequate process and appropriate notification to MDE).

CENTER GOAL ALIGNMENT:

How do the goals in the plan align to the Center's objectives? This is intended to focus each unit's plans to the Center's objectives.

DISCIPLINED ACTION:

Where in the plan is the expected outcome of the disciplined action? This directs the reader to where to find more detail.

COMPLETION DATE:






When is the expected outcome of the disciplined action? This aligns to dates established in the plan.

ON-TIME?

Was the outcome completed in a timely manner?

UNIT GOAL:

What are the overall goals of the plan (what is it trying to accomplish)? Generally, a plan's goals are found in its executive summary. The goals show alignment of the plan's goals to the Center's objectives.

Overall Deliverable	Actual	Status	NOTES
<p>...s and unit meetings ...views will assess ... School Operations ...e resources it needs ...high quality work ...d and respected.</p>	<p>As of 06/2016, ...</p>		<p>Weekly reports; met monthly with team members for 1:1; attended _____ session(s) as a team; held quarterly reviews to assess overall progress toward the PLAN as well as the overall motivation of the team.</p>
<p>...be efficiently ...d aligned with ...-approved</p>	<p>The year-end actual expenditures related to School Operations were within the final Leadership-approved budgeted levels.</p>		<p>Budget amendments were necessary for <line item examples> due to....</p>
<p>...% of all business ...reviewed, ...d maintained in ...e with the ...-established</p>	<p>_____ Business processes were updated in 2016 - including _____ Charter Accountability (____%) and _____ related to FP&A (____%).</p>		<p>_____ Charter Accountability business processes were not updated during 2016 due to ...; _____ FP&A business processes were not updated during 2016 due to</p>
<p>...or Class of 2016 ...ny new schools ...2016 opening.</p>	<p>_____ Contracts were executed properly, timely and accurately.</p>		<p>All Charter Contracts were Board-approved prior to 06/30/20__ and were delivered to MDE within 10-days of being fully executed as required by statute; all standard Contract Amendments were fully executed and routed to MDE by xx/xx/2016; _____</p>
<p>...ments deemed necessary ...e addressed timely; ...ments for 2016-2017 ...ess process allowing ...sing time (including ...tation and filing with</p>	<p>_____ Contract Amendments were executed properly, timely and accurately.</p>		<p>Contract Amendments affecting site additions and/or grade additions were executed properly, timely and accurately and filed with MDE prior to 09/03/2016.</p>



DISCIPLINED ACTION:
This item has been successfully completed, or is on track for successful completion by its expected time.

NET IMPACT:
There has been positive movement toward this goal in the last period.



DISCIPLINED ACTION:
Moderate progress has been made on this item, or this item is in progress, but is not currently on track for completion by its expected time.

NET IMPACT:
This goal has neither been advanced nor declined.



DISCIPLINED ACTION:
This item has not been successfully completed, or is not currently on track for successful completion.

NET IMPACT:
There has been negative movement toward this goal in the last period.



DISCIPLINED ACTION:
This item has not begun. In other words, a blank means there is nothing to say on this item at this time.

NET IMPACT:
A blank is not an option for Measurement of Changes. (Remember, our actions are only one of many things that affect progress toward these goals.)

METRIC:
What questions should be asked to determine whether progress is being made to the unit goal (net impact)? These questions can have either quantitative or qualitative answers.

OVERALL DELIVERABLE:
What is the impact that was expected? This is intended to provide for a benchmark to measure progress.

ACTUAL AND STATUS:
How much progress was made toward the goal? This section is informed by reviewing the established "metrics" and can be simply and graphically represented.

NOTES:
Are there any notes about the completion, schedule changes, observations or other elements that should be recorded? These can help inform leadership and also provide direction in plan revisions.

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