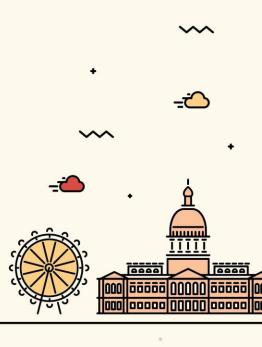


2016 NACSA LEADERSHIP CONFERENCE | ATLANTA, GA

STRATEGIC PLANNING WORKSHOP

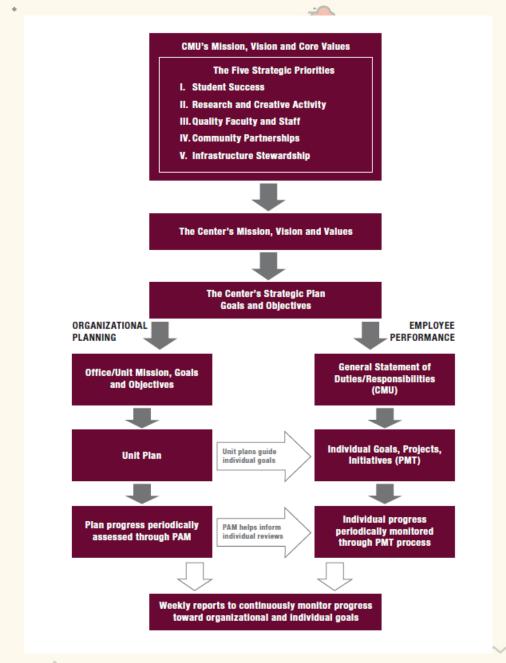




CMU AND THE CENTER'S STRATEGIC PLAN

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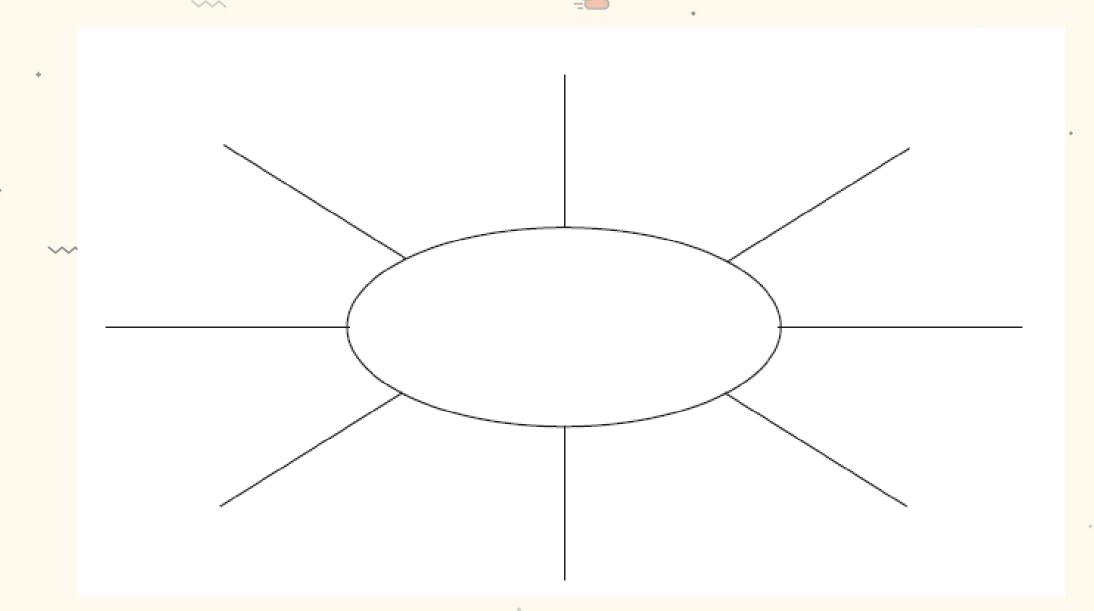


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MISSION, VISION, VALUES

| 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.

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.

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.

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.



WILDLY IMPORTANT GOALS (WIG)

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

WIG

- Establish partnerships with five high quality operators by June 30, 2017 that will positively impact our portfolio's performance.
- 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.
- 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

- Establish systems of measurement to formally track progress with Falcon Initiative schools to determine viability and longterm potential for continuation or expansion.
- 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.

WIG

- 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.
- Develop marketing/communications materials that target key audiences and stakeholders about the Center, specific programs, services and activities.
- 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.

WIG

- 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.
- 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.
- 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.

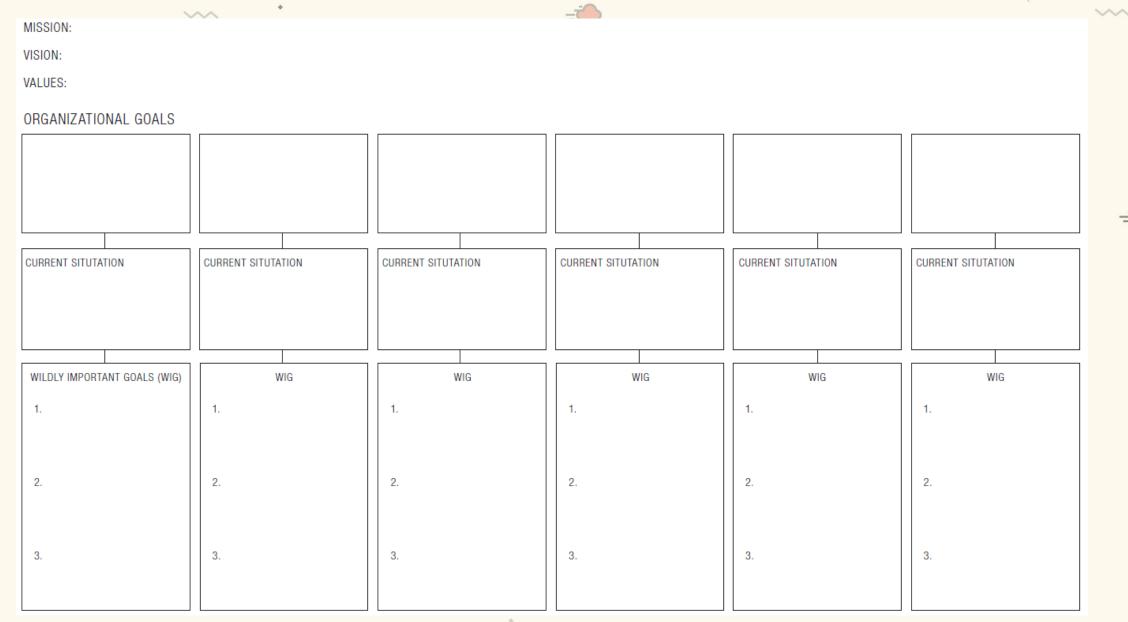
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WIG

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



ORGANIZATIONAL GOAL PLANNING MAP - CMU TEMPLATE



ORGANIZATIONAL GOAL PLANNING MAP - CHICAGO PUBLIC SCHOOLS EXAMPLE

Build an internal process consisting of Internal and external content area experts that review each complete application to ensure that it meets CPS standards. Develop a charter re-start initiative. Deploy a rigorous renewal process and a comprehensive process for closing low performing schools. Align the charter school growth strategy with the district strategy. STRATEGIC PRIORITY 1 Execute a rigorous authorization process that leads to an improved INTERDEPENDENCIES portfolio of schools a Law Department Safety and Security CEO's Office □ External: Other authorizers, NACSA, INCS, New Schools

- We will increase the number of high quality options throughout the district.
- We will improve the options available while being least disruptive to students and families.
- We will ensure students are in quality schools that
- We will ensure decisions are made in the best interest of the district and its communities.

IMPLEMENTATION GOALS

- 100% of complete applications will undergo a rigorous review process.
- gildentify 3 successful national operators that have an interest in Chicago for new schools.
- Identify and engage with 3 successful restart operators outside of Chicago <u>and 3 Chicago operators</u> 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

- 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.
- 5 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
- The overall performance of the I&I portfolio will demonstrate an

- Department of Facilities
- ODLSS
- Accountability
- Planning and Data Management
- Office of College and Career Success

LEAD PARTNERS

- Law Dept. Ruchi Verma, contribute to school closure process, review of all
- Law Dept. Joanne Murphy, Review of any RFP and agreement template CEO's Office - Hal Woods, Establish the district strategy
- Communications Emily Bitner, review all external communications for school closures,
- Facilities Justin Starr, Assess viability of facilities plans for all schools in independent
- Mary DeRuntz

- 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
- a Office of College and Career Success Molly Burke, assist with transition planning for
- a Access and Enrollment Katy Ellis, assist with identifying school options for students of

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 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
- Formally document progress using the project plan
- Develop a high level dashboard to communicate relevant information to senior leadership

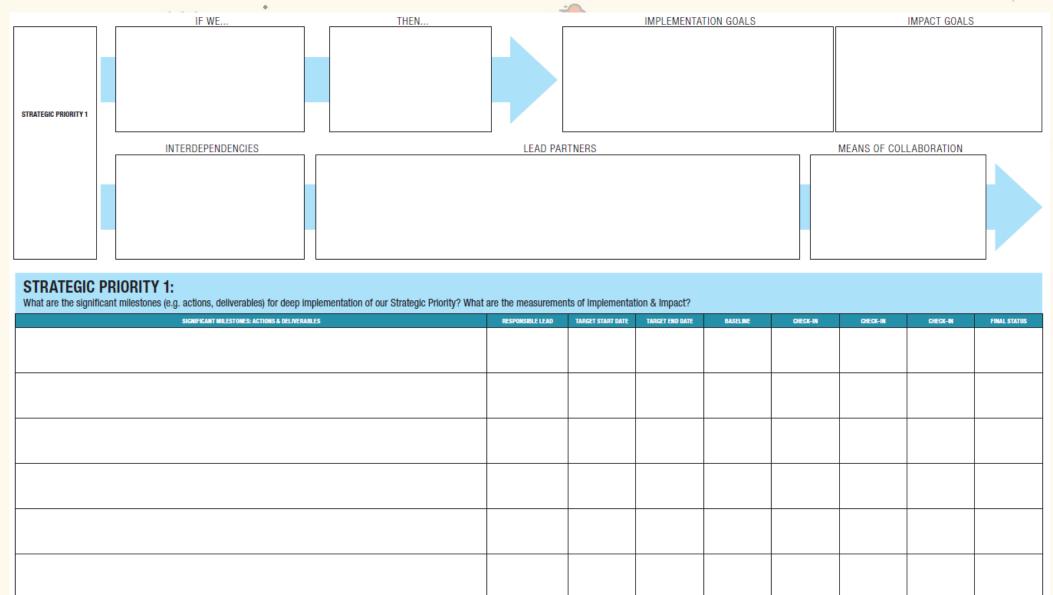


STRATEGIC PRIORITY 1: Execute a rigorous authorization process that leads to an improved portfolio of schools

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

| SIGNIFICANT MILESTONES: ACTIONS & DELIVERABLES | RESPONSIBLE LEAD | TARGET START DATE | TARGET END DATE | BASELINE | CHECK-IN | CHECK-IN | CHECK-IN | FINAL STATUS |
|---|---------------------|-------------------------|------------------------|----------|----------------------------|--|--------------------------------------|--------------|
| New Schools RFP Conduct rigorous reviews Approve new high quality schools to open Executive final agreements Plan and Baunch 2017 RFP | | April 2016 | May 2017 | | FY16 Aug. 2016 | FY16 Aug. 2016 FY17 Oct. 2016 | Y16 Sept 2016 FY17 May 2017 | |
| Restart Initiative Development and approval of policy Release RFP Identify and engage quality restart providers Engage with stakeholders Makin providers with closing schools Execute timal agreements | Elisa M. Botelio | Sept. 2016 Nov. 2016 | July 2018 | | Oct. 2016 | Jan. 2017 | Mar. 2017 | |
| 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. Botello | May 2016 Aug. 2016 | Oct. 2016 Nov. 2016 | | June 2016 #1: Aug. 2016 | #2: Aug.2016 | #1: Sept. 2016 | |
| Incubation Develop individualized plan for communication and engagement for schools opened within past 3 years Review of academic, financial, operational (compilance, staff turn-over, parent engagement/concerns, enrollment, STLS, EL, DL), Governance, CMO/EMO changes Quarterly check-ins and visits if needed | Yesica Rufino-Perez | | | | | | | |
| School closure Engage consultant in process revisions Identify student options Execute wind down agreement Complete wind down process | Yesica Ruffno-Perez | Nov. 2016 Oct. 2016 | June 2017 | | Dec. 2016 | Mar. 2017 | May 2017 | |
| Strategy Alignment Clarification of high school and elementary district strategy Identification of areas in need of quality seats Aligned processes and communication | Mary Bradley | June 2016 | June 2017 | | Sept. 2016 | Jan. 2016 | Mar. 2017 | |

ORGANIZATIONAL GOAL PLANNING MAP - CHICAGO PUBLIC SCHOOLS TEMPLATE



TRACKING TOOL - CHICAGO PUBLIC SCHOOLS EXAMPLE

| | | · · · · · · · · · · · · · · · · · · · | | | | | | | | | | | |
|---------------------------|--|--|--|------------------|------------------|-----|-----|-----|-----|-----|-----|-----|-----------|
| INDICATORS (KPIS) | | | TARGET | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | FINAL/EOY |
| IMPLEMENTATION INDICATORS | Complete applications submitted will undergo a rigorous review process | 100% | On-Track | On-Track | | | | | | | | | |
| | IMPLEME INDIC/ | # of successful Chicago and national operators identified and engaged | 3 national operators (new schools) 6 Restart (3 existing & 3 new to Chicago | Not On- Track | Not On- Track | | | | | | | | |
| | | % of schools in renewal that undergo a rigorous process | 100% | On-Track | On-Track | | | | | | | | |
| | IMPACT | % of new schools with SQRP ratings of Level 2+ or higher after 3 years | 100% | N/A | Under Review | | | | | | | | |
| IMPA | % of school closures who became "restart schools" | 1-2 | N/A | N/A | | | | | | | | | |
| | | % increase in academic performance of entire I&I portfolio | Overall increase of 10% of level 2+ and higher schools | N/A | Under Review | | | | | | | | |



TRACKING TOOL - CHICAGO PUBLIC SCHOOLS TEMPLATE

| | INDICATORS (KPIS) | TARGET | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | FINAL/EOY |
|------------------------------|-------------------|--------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----------|
| IMPLEMENTATION INDICATORS | | | | | | | | | | | | |
| IMPLEME | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| IMPACT INDICATORS | | | | | | | | | | | | |
| IMP | | | | | | | | | | | | |
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UNIT PLAN ASSESSMENT MATRIX (PAM) EXAMPLE

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| Center Objective | PL | AN Objective/Schedule of Deliverables | Completion Date | On- Time? | Unit Goal (Net Impact) | Metric (critical questions) | Overall Deliverable | Actual | Status | NOTES |
|---------------------|------|--|--------------------|--------------|--|--|---|---|--------|---|
| Objective | STAN | DARD OPERATING PROCED | | ranci | | questionsy | | | | L |
| 6 | 1.1 | Lead and Manage the School Operations Staff | 30-Jun | 0 | Operations Unit operates effectively to carry out the Unit PLAN through the | Does the School Operations team have the resources to perform high quality work that is valued and respected? | Through 1:1s and unit meetings continual reviews will assess whether the School Operations team has the resources it needs to perform high quality work that is valued and respected. | | 0 | Weekly reports; met monthly with team members for 1:1; attendedsession(s) as a team; held quarterly reviews to assess overall progress toward the PLAN as well as the overall motivation of the team. |
| 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? | budget. | The year-end actual expenditures related to School Operations were within the final Leadershipapproved budgeted levels. | 0 | Budget amendments were necessary for <line examples="" item=""> due to</line> |
| 5 | | Manage and Implement the associated Business Processes | 30-Jun | 0 | | Are business processes reviewed annually and updated, as necessary, in order to continually improve consistency and efficiencies within the unit? | At least 95% of all business processes reviewed, updated and maintained in accordance with the Center's established schedule. | Business processes were updated in 2016 - including Charter Accountability (%) and related to FP&A (%). | 0 | Charter Accountability business processes were not updated during 2016 due to; FP&A business processes were not updated during 2016 due to |
| 3, 5 | MAN | IAGE THE CONTRACT D | EVELOPMEN | IT PROC | ESS | | | | | |
| | I | 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 Class of 2016 (13) plus any new schools with a fall 2016 opening. | Contracts were executed properly, timely and accurately. | 0 | 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; |
| | 2.2 | Manage the Charter Contract Amendment Process | 30-Jun | • | | Were Contract Amendments executed properly, timely and accurately? | Contract amendments deemed necessary for 2015-2016 are addressed timely; Contract amendments for 2016-2017 follow the business process allowing adequate processing time (including apprpriate notification and filing with MDE). | Contract Amendments were executed properly, timely and accurately. | • | Contract Amendments affecting site additions and/or grade additions were executed properly, timely and accurately and filed with MDE prior to 09/03/2016. |





KEEP IN TOUCH

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