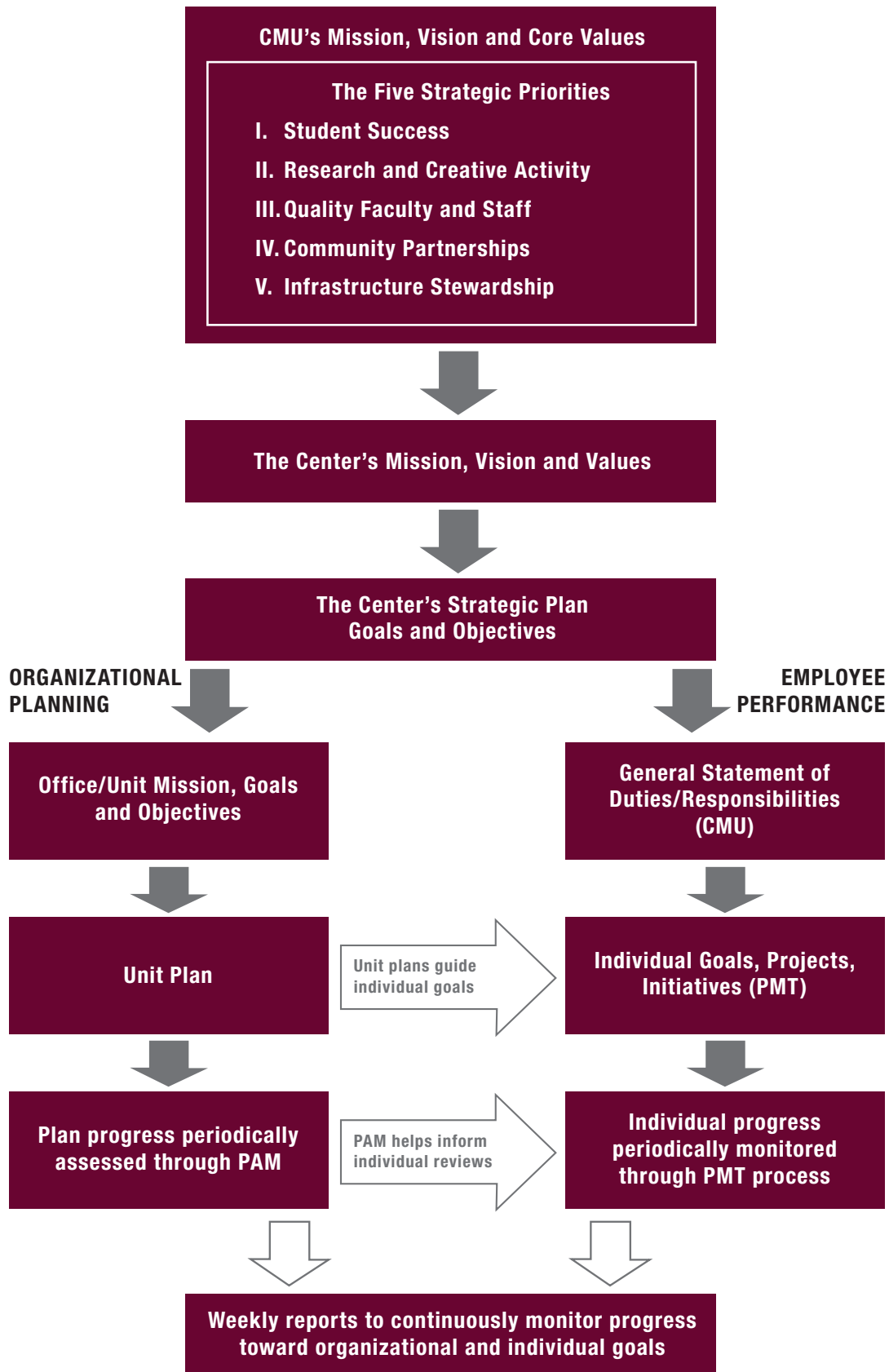


AN OUTLINE OF THE  
CENTER'S PLANNING PROCESS

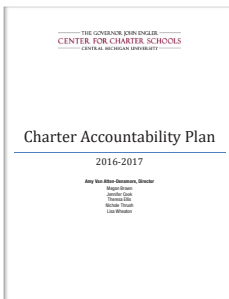
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# OFFICE PLANS AND CMU EMPLOYEE PERFORMANCE MANAGEMENT: HOW THEY RELATE



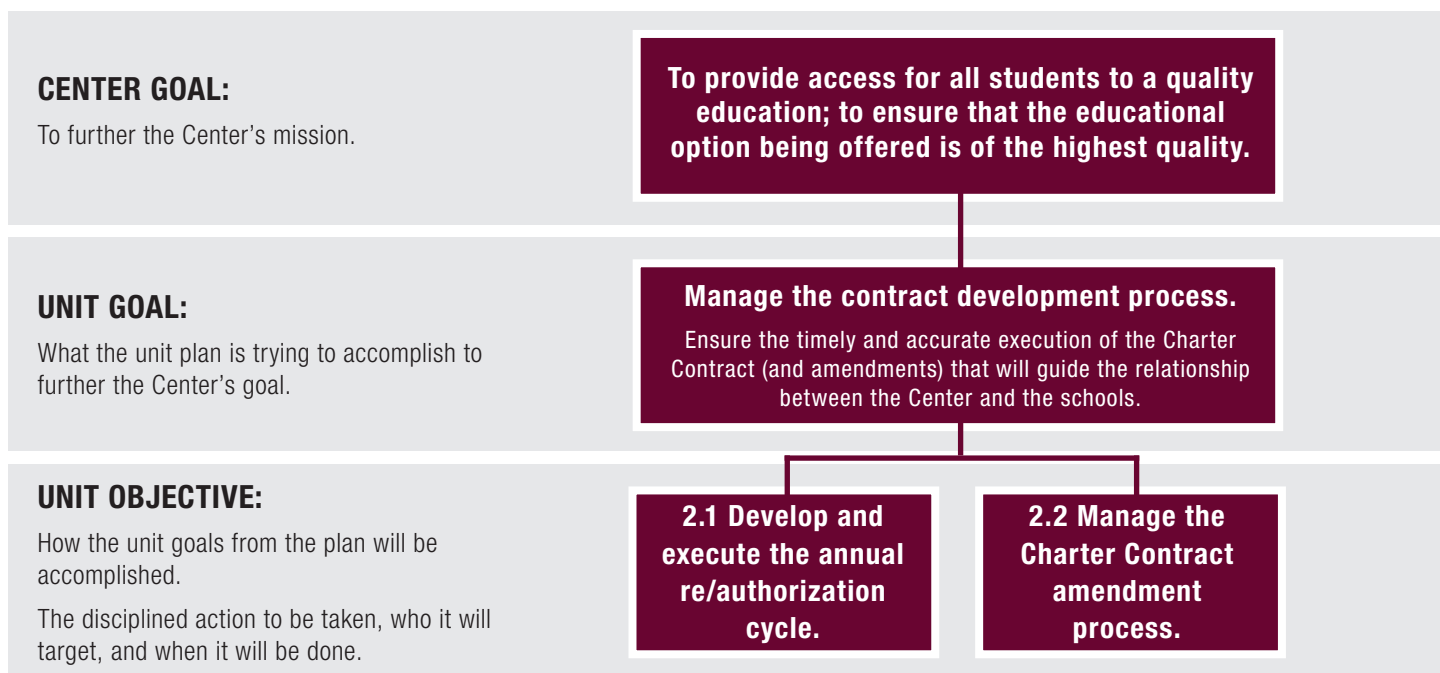
# THE ORGANIZATION OF A PLAN:

## AN EXAMPLE



The development and adherence to planning is a way to help coordinate and focus office efforts on advancing The Governor John Engler Center for Charter Schools' mission. As such, they are organized in a hierarchy, outlining:

- The **plan's goals** to further the Center's mission.
- The broad **objectives** established to accomplish these goals.
- The **disciplined actions** that will be taken to accomplish objectives.



# MEASURING PROGRESS:

## THE PLAN ASSESSMENT MATRIX (PAM)

2016-2017 Charter Accountability Progress Report  
PLAN Assessment Matrix (PAM)

Center Objective	Completion Date	On-Track?	Unit Goal (per request)	Measurable Objectives (per request)	Overall Deliverables	Actual	Notes
4.1	08/31/16	●	Ensure that the Center effectively to carry out the contract development and implementation of annual charter agreements.	Ensure that the Center effectively to carry out the contract development and implementation of annual charter agreements.	Develop and execute the annual re/authorization cycle.	●	Ensure that the Center effectively to carry out the contract development and implementation of annual charter agreements.
4.2	08/31/16	●	Ensure that the Center effectively to carry out the contract development and implementation of annual charter agreements.	Ensure that the Center effectively to carry out the contract development and implementation of annual charter agreements.	Manage the contract development process.	●	Ensure that the Center effectively to carry out the contract development and implementation of annual charter agreements.
4.3	08/31/16	●	Ensure that the Center effectively to carry out the contract development and implementation of annual charter agreements.	Ensure that the Center effectively to carry out the contract development and implementation of annual charter agreements.	Manage the contract development process.	●	Ensure that the Center effectively to carry out the contract development and implementation of annual charter agreements.
4.4	08/31/16	●	Ensure that the Center effectively to carry out the contract development and implementation of annual charter agreements.	Ensure that the Center effectively to carry out the contract development and implementation of annual charter agreements.	Manage the contract development process.	●	Ensure that the Center effectively to carry out the contract development and implementation of annual charter agreements.

The **plan assessment matrix (PAM)** is the part of the plan that measures progress in the plan's implementation. The PAM is divided into two sections:

- A **schedule of deliverables** that tracks the completion of unit objectives/disciplined actions and outlines their outcomes.
- A **measurement of changes (the plan's net impact)** that shows the alignment of the unit plan's goals to the Center's organizational goals.

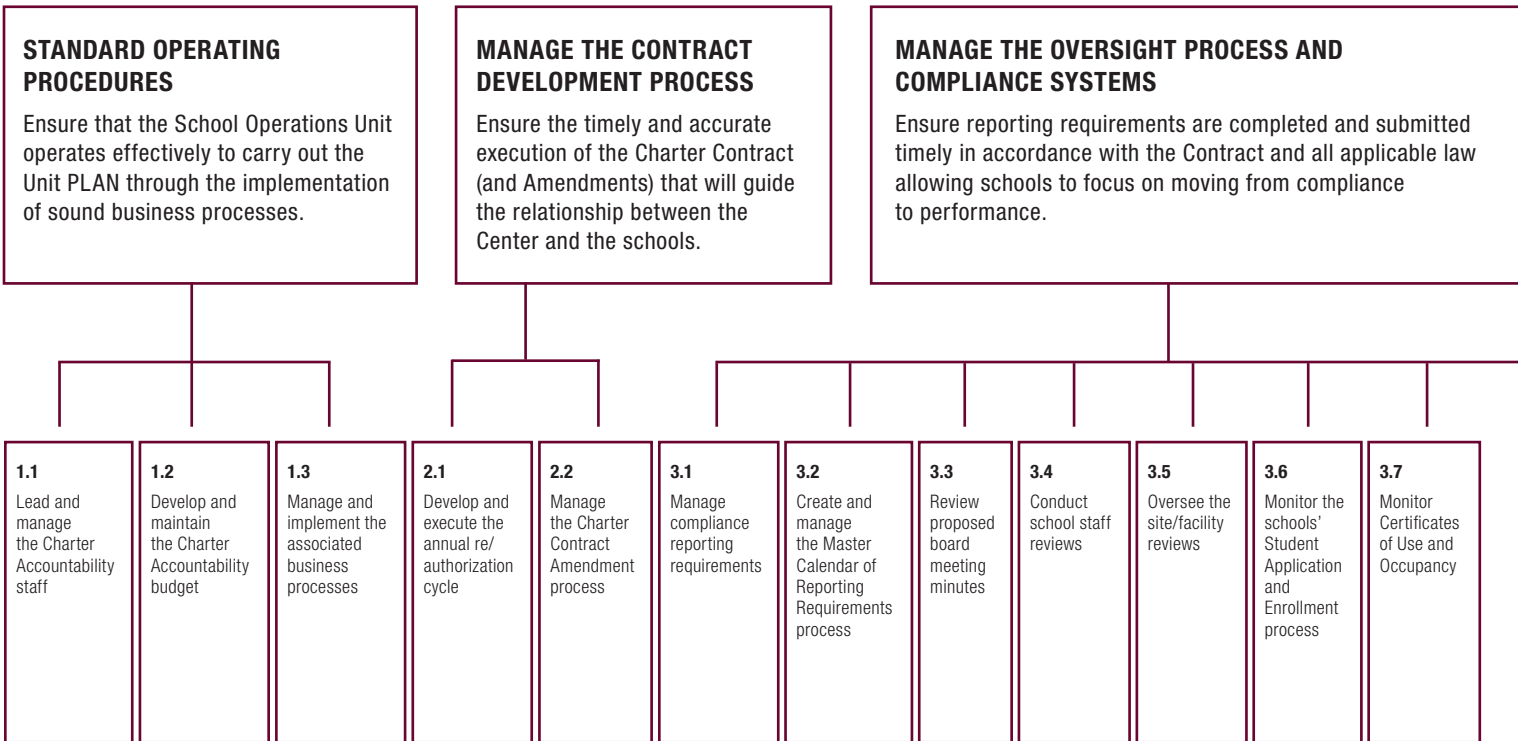
# UNIT PLANNING MAP EXAMPLE:

## CHARTER ACCOUNTABILITY PLANNING MAP

### CENTER ORGANIZATIONAL GOALS



### UNIT GOALS



## 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.

## MANAGE THE DOCUMENT REVIEWS CONDUCTED BY THE CHARTER ACCOUNTABILITY UNIT RELATED TO THE SCHOOL'S ORGANIZATIONAL DOCUMENTS

Ensure reporting requirements are completed and submitted timely in accordance with the Contract and all applicable law allowing schools to focus on moving from compliance to performance.

## MANAGE THE FLOW OF INFORMATION

Ensure Charter Accountability maintains effective communications via direct and indirect methods.

3.8

Monitor Pre-K licenses and review early childhood education questionnaire

3.9

Manage clock hours compliance

3.10

Develop/ manage the Notices of Intent to Revoke and Plans of Correction

4.1

Review educational program documents

4.2

Review curriculum documents

4.3

Review educational goal documents

4.4

Review position descriptions documents

4.5

Review physical plant descriptions documents

5.1

Manage the School Complaint process

5.2

Manage the Charter Accountability portal page

5.3

Manage the Charter Accountability content on the Center's website

5.4

Communicate timely with applicable regulatory agencies (including MDE, BCC, BFS)

5.5

Manage the Operation Performance Report process

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
<b>STANDARD OPERATING PROCEDURES</b>						
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 and in accordance with Center's schedule.
<b>3, 5 MANAGE THE CONTRACT DEVELOPMENT PROCESS</b>						
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 fulfilled (13) plus another 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 and 2016-2017. Contract amendments follow the business process and adequate process for appropriate notification (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>Weekly reports and unit meetings reviews will assess School Operations the resources it needs high quality work 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>Efficiently 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 &lt;line item examples&gt; due to....</p>
<p>% of all business reviewed, and maintained in line with the established</p>	<p>_____ Business processes were updated in 2016 - including _____ Charter Accountability (____%) and _____ related to FP&amp;A (____%).</p>		<p>_____ Charter Accountability business processes were not updated during 2016 due to ...; _____ FP&amp;A business processes were not updated during 2016 due to ....</p>
<p>For Class of 2016 any 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>Contract amendments deemed necessary addressed timely; amendments for 2016-2017 process allowing time (including 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.

———— THE GOVERNOR JOHN ENGLER ————  
**CENTER FOR CHARTER SCHOOLS**  
———— CENTRAL MICHIGAN UNIVERSITY ————

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