

# Changing Charter School Futures with Strategic Performance Management in Hawai'i

Strategic planning is widely seen as a very effective way to help organizations perform at their best. In education, a good strategic plan can lead to major improvements in schools and, in turn, better educated students. In 2019, the Hawai'i State Public Charter Schools Commission (SPCSC) asked R19CC to help them review and revise their current strategic plan through the Strategic Performance Management (SPM) process. Their goal was to strengthen high-quality diverse educational opportunities for students enrolled in public charter schools in line with their mission to “authorize high-quality public charter schools throughout Hawai'i”.

SPM is a collaborative process that goes further than traditional strategic planning. SPM guides an agency through the steps of developing a strategic plan, monitoring the implementation of that plan, and then using the lessons learned from one's organizational performance to make changes to the plan and innovate programs in an ongoing way. Conceived in 2015 by Dr. Sam Redding and Dr. Allison Layland, this evidence-based process has been used with Departments of Education in Arkansas, Commonwealth of the Northern Mariana Islands, Guam, Kansas, and Missouri, as well as the Bureau of Indian Education. These organizations demonstrated increased collaboration among staff and a sharper focus on supporting their schools, students, and families.

While the successful adoption of the SPM process can be measured by how well an organization continuously improves, it is also measured by how inclusive it is when it comes to the strategic planning process. Meaningful involvement of staff and stakeholders in the planning process leads to buy-in and is the only way to ensure sustained organizational change. Only a few years into this process, the SPCSC is making big strides on multiple fronts, from increased communication and engagement across the agency, to ongoing planning, monitoring of their own work, and using progress data to more strongly integrate their goals to build a portfolio of high-quality, innovative charter schools.

## Identifying the Need for Organizational Improvement

At the time the SPCSC decided to take SPM on board, charter schools made up 11 of the 13 schools in Hawai'i needing Comprehensive Support and Improvement (CSI) or Targeted Support and Improvement (TSI). Acting on this information, the SPCSC engaged the R19CC to support their organizational improvement efforts with the goal of an approved strategic plan at the forefront. This approved plan needed to not only “reflect the charge of the Commission based on statute and the needs of the schools, students, families, and communities”, but also represent Hawaiian culture and values, reinforcing the function of SPCSC as a “contributor to the larger Hawai'i education ecosystem” (TA Provider).

<sup>1</sup> <https://files.eric.ed.gov/fulltext/EJ1079087.pdf>

*“Without trying to gush and be too over the top...we are more than happy with the support, assistance, [and] service that we receive from the CC”.*

*– SPCSC Staff*

The R19CC was a particularly fitting partner as they had helped the SPCSC in the previous CC round to develop their first strategic plan. With the guidance of R19CC’s coaching, content expertise, and resources, SPCSC leaders and staff had an opportunity to reflect on their work, dig deeper into their implementation data, reset their plan, and use a complete performance management system (SPM) to continuously diagnose, improve, and evolve.

SPCSC stakeholders described the experience of working with the R19CC as meaningful and invigorating. For example, one member described staff as “really energized” by their participation and expressed that staffers who are not typically engaged have been highly involved in the planning process. They’re committing to the work with a view to changing how SPCSC operates in the long-term; they’re excited to see the downstream impacts of SPM on their schools, and ultimately, students.

The project was not always smooth sailing. The SPCSC dealt with their share of upheaval and delays because of the COVID-19 pandemic and protracted leadership turnover in the first two project years. As one client shared, “we just came off a great year of work...and...gotten into a real process of reporting regularly using [SPM]...but when the year was disrupted by COVID-19, we stopped...overwhelmed by...more immediate tasks”.

The change in leadership led to the decision to rewrite the existing strategic plan entirely. While this was a big change at first, staff agreed that going back to the drawing board was the right move: “The...goals [of the new plan] speak directly to all of the work of the SPCSC, and [it’s] strength is that it provides a continuous cycle of reflection and improvement...”.

R19CC worked with incoming SPCSC leadership to make sure they really focused on creating a new strategic plan that reflected SPCSC’s purpose and direction. Critically, they included SPCSC staff from across the organization in designing it. An SPCSC primary client described how this inclusive process helped staff to pull the plan together and realize that it reflects the work they do every day: “We’re the ones that have to do the work. It actually should be coming from us, and we can engage and bring our Commissioners in, but it cannot be top down.” By September 2021, the SPCSC had a Strategic Direction that was officially approved, and the project charged ahead in Years 3 and 4.

*“...[to] be responsive to the culture or what the folks there are wanting, but still push the point of there's some change and hard work that needs to be done. That's pretty impressive. I've been very impressed with the [CC's] flexibility.*

*– SPCSC Primary Clients*

## Major Impacts

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Since developing the plan, SPCSC departments have regularly reported on its implementation using the SPM with a task completion rate of 80-90%, SPM has helped them stay consistent in their progress through the changes and roadblocks.

Another compelling impact of the SPM project is the SPCSC’s expanded capacity for strategic planning in a collaborative and ongoing fashion. SPCSC stakeholders noted in particular how improved communication between leadership and staff is promoting a shared understanding of and investment in their strategic direction. As one client shared, “...having the entire staff involved in creating the plan and having Commissioners participate really gives everyone a better understanding and say in how we move forward” (SPCSC Primary Client).

The SPCSC's new strategic plan is guided by three highly responsive goals:

### Goal 1

To attain a public charter school portfolio representing high-quality, diverse educational opportunities for students and their families.

### Goal 2

To maintain a high-quality, diverse public charter school portfolio of schools that meet statutory and contractual expectations.

### Goal 3

To sustain a high-quality, diverse public charter school portfolio that contributes to Hawai'i's public education system.

These goals build on and inform each other. Each goal is matched to a series of "strategies," "milestones," and "performance indicators" to monitor and evaluate how well the plan is being put into action.

Using SPM has also helped the SPCSC turn their strategic plan into a dynamic, "living document". So often strategic plans go unused. They sit dormant on websites or get shoved "on a shelf in a binder". "It's a living thing as opposed to most strategic plans...This one is a task that's in process...And for the most part, everybody has their hand in it..." (SPCSC primary client). However, SPCSC staff are very proud of the strategic plan they created with R19CC for the way "it organically moves", making it "really different" from other strategic plans. One SPCSC primary client went further to describe how they include the strategic plan into their daily work: "[SPM] is core to the work we do...what's been fun is...looking at the strategic plan and seeing our work is reflected directly there".

SPCSC staff and Commissioners are also using those data to have "deep discussions". For example, those working on Goal 1 of their strategic plan spent "a lot of time and effort" perfecting the definition of "high-quality public charter schools." They're also working on a data dashboard to communicate the results of these conversations with families. SPCSC is deeply invested in clarifying the purpose and function of a Charter School Authorizer, improving their understanding of the measures that are right for evaluating the effectiveness of charter school programs. As a result, SPCSC envisions that the charter schools they authorize will provide higher quality and more diverse educational opportunities to students and their families.

## Moving Towards Sustainability

The SPCSC is moving into an advanced stage of using SPM to monitor and report on how they're putting their strategic direction into action. R19CC will provide on-demand coaching, consultation, and activity monitoring to guide the SPCSC's move towards total independence in using the process and online system. SPCSC leadership spoke highly of R19CC capacity building services, praising the support, the critical "outside perspective", and "honest feedback" the Center provided as they step into the future with SPM: "We are prepared to move into the next iteration of our strategic plan. The coaching, the guidance, that the TA staff has prepared us to do it on our own."

*"The impact is that we are beginning subtle shifts with both monitoring of our charter schools and being clear[er] about what we're monitoring. And that then leads into more effective monitoring..."*

*- SPCSC Commissioner*