

Public School Academies Unit

STRATEGIC PLAN

Improve Student Performance

Maximize Access to
Educational Options

Respond Timely to
Customer Needs

Adhere to the Law

Strategically Lead

Build Capacity with
Every Contact

Promote Honesty, Integrity
& Teamwork

Set the Bar High In Everything
We Do

Maintain Positive Attitudes, Work
Ethic & Relationships

Produce Quality Products and
Services Worthy of Emulation

Leaders Establish & Maintain a
Quality Environment Where
Every Employee Can Reach
Self-Actualization



January 2014

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STATE OF MICHIGAN
DEPARTMENT OF EDUCATION
LANSING

MICHAEL P. FLANAGAN
STATE SUPERINTENDENT

January 2, 2014

MEMORANDUM

TO: MDE All

FROM: Mark Eitrem, Supervisor, Public School Academies Unit

SUBJECT: Public School Academies Unit Strategic Plan (2014-2018)

The Public School Academies unit would like to thank its many stakeholders for the time and effort expended in the development and refinement of this Strategic Plan. It is our intent to use this document as we move through the next five years. This is a living document that sets goals, objectives and establishes activities designed to achieve those goals and objectives. We are fully aware that most organizations are not able to achieve their vision end state in just five years, if ever, so we have focused on what we think we can accomplish in what we think is a reasonable time frame.

It is important to note that we are not able, in large measure, to control some external environmental conditions, so we have established a number of assumptions to help us work through the challenges. If the assumptions don't prove to be true, or if some unknown condition upsets the overall status of the unit or the Department, we will obviously have to adjust our plan. We also know that politics and adult issues may have an impact on our ability to achieve our goals, but we will work tirelessly to mitigate them as much as possible.

And finally, successful organizations always seek improvement, execute at a high level, are values based, know where they are headed, and how they are going to get there. Quite simply, that is what this document is designed to do. Additionally, it is important to note that this document has not been vetted or approved by anyone outside of the Public School Academies unit.

Comments or questions regarding this document should be addressed to Mark S. Eitrem, Supervisor, Public School Academies Unit, Office of Education Improvement & Innovation (OEII), Michigan Department of Education (MDE).

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i. Introduction

This Strategic Plan (hereafter referred to as the PSA STRATPLAN) establishes the priorities for action within the Public School Academies (PSA) unit. It provides a unified mission and vision, accepts the core values upon which the organization is built and operates, and establishes goals in four main areas: Communication & Collaboration, Unit Capacity, Technical Assistance, and Public Outreach. Each of these goals is defined for context with an initial statement providing clarity. Within each goal there are short and long term objectives (STO/LTO) that seek to provide further definition for targeting and focus. Then finally, each STO/LTO is assigned a number of key activities aligned to those objectives. Please keep in mind that some objectives and activities are not exclusive and may support a number of goals.

Since there are no subordinate entities of the PSA unit, there are no tasks assigned to others. However, a reader will see that the PSA unit expects to grow from a unit to an office within the next five years, based in large part to the list of assumptions. In moving to an office-level organization it is expected that some existing programs or units may be absorbed or otherwise assimilated into this new office structure. The assimilation of those programs or units is not listed within the assumptions because it has been determined that they are relatively ancillary to the primary focus which is support of school options, primarily public school academies.

ii. Input and Updates to the Strategic Plan

The PSA unit is responsible for the gathering of input, creating and maintaining the document in a relative state of currency and to making updates as necessary. This includes establishing, executing, monitoring, and modifying respective processes, organizing periodic updates, and ensuring tasks and activities are completed. It also includes the publication of "Issue White Papers" to help inform and encourage decision makers to make choices that help to move the unit/office in a consistent, thoughtful, and focused direction. Stakeholders may submit comments, questions, or proposed changes to the Supervisor, PSA unit as desired. STRATPLAN metric updates will be provided on a periodic basis to the Office of Education Improvement and Innovation (OEII) until such time as the PSA unit transitions to an office. Once the transition occurs the organization will submit metric updates to the Assistant Superintendent responsible for that new office-level organization. On an annual basis, the PSA unit/office supervisor will publish a status update document including an assessment of performance metrics tied to the goals, objectives, and activities contained within the STRATPLAN. It should be noted that many of the activities and objectives are aligned with the CSP grant priorities as established by the United States Department of Education (USED).

iii. Mission/Vision

Mission: Through rigorous oversight and technical assistance, the PSA unit provides leadership in the development and maintenance of high quality school options to better meet the educational needs of Michigan communities, now and in the future.

Vision: The PSA unit is a dynamic and committed catalyst for high quality learning choices for all students.

iv. Organizational Values

The PSA unit is a value-based organization incorporating these specific non-negotiable values:

- Our focus is on improved student performance which is the bedrock of everything we do,
- We will take advantage of every opportunity to maximize the quantity of quality educational options for each and every student,
- As an organization that is sensitive to the needs of our customers, we will provide timely and accurate responses and feedback to every stakeholder,
- As a governmental entity, we will judiciously adhere to state and federal law,
- Our mantra will be: "We build capacity with every contact,"
- Honesty, integrity and teamwork will be the pillars of our organization,
- We will distinguish ourselves through the demonstration of positive attitudes, work ethic and relationships,
- Our leadership efforts will be focused and strategic,
- Setting the bar high in everything we do will be routine and systemic,
- The products and services we provide will be of such quality that they will be worthy of emulation, and
- The organizational leaders will work to provide an environment and culture where every employee can reach self-actualization as defined by Abraham Maslow's seminal creation describing the hierarchy of needs.

v. Strategic Goals

The PSA unit's goals fall under four main categories, Communication & Collaboration, Unit Capacity, Technical Assistance and Public Outreach. Each category has a number of goals included, as described below.

Area 1. Communication & Collaboration

Goal 1. Collaborate with MAPSA and other similar stakeholders to increase the unit's scope of influence and to provide needed support to the field

Goal 2. Improve communications and resources to stakeholders

Goal 3. Increase and improve communications and collaboration with other MDE units and offices

Goal 4. Improve PSA/MDE/ISD/USED relationships and connections

Goal 5. Inform the right people about the PSA unit's legislative/statutory/procedural needs

Goal 6. Enhance statutory language to promote enhanced oversight by the PSA unit/MDE

Area 2. Unit Capacity

Goal 1. Write a quality federal Charter School Program (CSP) grant and receive grant funding to support the development of high quality PSAs; if unsuccessful, seek and receive alternative funding to support a similar development program

Goal 2. Utilize MDE technical systems whenever possible to efficiently streamline workflow efforts

Goal 3. Work to be more cognizant and knowledgeable of federal and state legislation as it relates to school options, especially PSAs

Area 3. Technical Assistance

Goal 1. Improve access and modalities for technical assistance

Goal 2. Improve low performing PSAs and improve the quality and quantity of data that reflects PSA growth

Goal 3. Help to create a better understanding of MDE/CEPI systems and corresponding reporting requirements

Area 4. Public Outreach

Goal 1. Address anti-PSA perceptions by providing timely and unbiased reports, and by directly addressing misperceptions with data that the public can understand

It should be understood that it was not our intention to create a document that takes credit for routine activities, so many of the things we do every day are not included here. This STRATPLAN focuses on those things we believe must change to continuously improve, both in terms of our unit's internal capacity as well as the things we do or provide in support of others. For example, grant monitoring and charter contract reviews are not included in this document primarily because we do not plan to change those processes unless the legislature or USED directs us to do so.

1. Situation

Absent any legislative changes to the contrary, the number of PSAs and subordinate schools will increase indefinitely, especially as traditional public school districts continue, with increasing frequency, to issue charter contracts for alternative education options, including cyber schools, alternative education and strict discipline academies. This increase in the number of district-level PSAs will continue to challenge support organizations as static resources are stretched. The increase in LEA charter authorizers, coupled with the overall increase in the number of new authorizers, most of which have demonstrated limited capacity to properly provide quality oversight to PSAs, and the recent use of chartering as a financial strategy rather than an educational one, has further exacerbated the lack of support. Given the historical tension between some ISDs and their constituent PSAs and the lack of consistent support from authorizers, it is incumbent upon MDE to find alternative mechanisms to support PSAs, especially those with records of under-performance.

a. Purpose

This STRATPLAN is a living document designed to provide a framework or roadmap for improving support to the ever-increasing number of PSAs. The developers of this STRATPLAN acknowledge there are likely to be a plethora of yet to be determined, intermediate actions that may impact the transition from the current state to some future state, and we have intentionally avoided addressing every possibility because doing so would probably be a waste of time and effort. It should be understood that the crafters of this document are not in a position to directly influence state or federal legislative action or statutorily-authorized resources, nor are we capable of causing political forces, inside or outside of the government, to focus their attention on the best interest of all public schools and all of the students they serve. However, failure on the part of these entities to take action will not impede the PSA unit's will or desire to make a difference with all public school students, every single day, and with every single contact.

b. Organizational Design

This plan's design begins with a current PSA unit that includes three primary programs: Compliance, Charter School Program Grant Management, and Technical Assistance. Current staffing includes an Education Consultant Manager 15, an Education Consultant Manager 14, four Education Consultant 13s, an Analyst 11, and a Secretary 9. Through a solid, focused and incremental training program involving some very detailed and complex cross-training, all consultants and managers are fully capable of supporting each program. This relatively flat hierarchical structure has permitted the organization to operate at a high level with multiple, interchangeable staff members.

The plan will evolve as some programs are expanded and others are added to the unit, thereby creating a structure that resembles an office. While not specifically prescribed or mandatory, some programs that logically fit into this new organizational design could include: the seat-time waiver program, the boarding school program, and the non-public school program. This plan also envisions the possibility that current support to PSAs being offered by other offices could be moved to this new organization, including School Reform Office monitoring of low performing charter schools, state-wide system of support elements, and other elements that are currently under contract with ISDs to provide support to those same schools. A logical extension of this thought process would also necessitate some involvement with the Office of Field Services as they consider and review consolidated applications for low performing PSAs.

c. Assumptions

In order to establish any long-term plan, it is necessary to recognize the current state and to envision the future. As part of the process, the acceptance of some assumptions while ignoring others may lead to a number of alternative futures. As was stated earlier, it would be impossible to consider all alternative futures or to plan for all of them in a significant or meaningful way. As such, we have examined and validated a number of the assumptions to create what we think is the most probable future state. This plan has been built to support an organizational evolution in that direction.

That projection into the future requires the planners to make some assumptions about what may or may not happen in the short term (next year or two) or long term (next three to five years) future. A reader should not expect the following list of assumptions to be exclusive or limited, nor should one believe or suggest that the invalidation of one or more assumptions nullifies the plan or any element of the plan.

The following assumptions have been considered in this plan:

- Michigan will receive a federal CSP grant in 2015 thereby securing some measure of limited funding for new charter school startups and some limited administrative funding to support staffing costs,
- Enrollment in PSAs will increase by approximately 5,000 students every year through 2019,
- The number of PSAs will increase by 20 each year through 2019, totaling nearly 400 by the end of 2019,
- The number of PSA schools will increase by 30 each year through 2019, totaling nearly 600 by the end of 2019,

- The number of PSAs closing will average about 10 each year through 2019, adding another 50 closures to current list of more than 70,
- The number of new PSA authorizers issuing charters will remain at about five per year through 2019, primarily Local Education Agencies (LEAs),
- PSAs will not become PSA authorizers,
- MDE will not become a PSA authorizer,
- There will be new legislative language regarding the movement of PSAs to the Education Achievement Authority (EAA),
- MDE's culture will change very little, making expanded efforts toward internal collaboration necessary,
- PSA unit's exposure and oversight responsibility will increase,
- Government will be evaluated by value added measurements
- If Michigan receives a federal CSP grant in 2015, our relationship with the United States Education Department (USED) will improve,
- Unless statutory language changes, MDE's oversight responsibility with respect to charter authorizers will continue to be challenged,
- Accountability and transparency will continue to be a point of emphasis with the State Board of Education, the MDE, the Michigan Legislature and the general public,
- Virtual/Cyber/Online learning options will continue to expand,
- Teacher preparation and certification requirements will continue to increase in rigor,
- Teacher/Leader turnover will continue to be an issue in urban PSAs,
- Teacher/Leader capacity will continue to be an issue in urban PSAs,
- The issuance of charters to former traditional public schools will expand as a financial strategy, rather than an educational one,
- Facility availability for PSAs will continue to be a challenge,
- Without some serious innovations, some educational markets will become saturated,
- Absent legislative and procedural changes involving large initial capital outlays or increases in state aid, high performing, nationally recognized charter operators will not come to Michigan,
- There will continue to be a need for high quality high schools,
- Providing high quality education options to urban and rural students will continue to be a challenge, and
- PSA unit duties and responsibilities with respect to priority schools will increase.

d. Environment

The current environment surrounding the PSA unit is a complex and often contradictory tale. To fully understand the situation, it is important to recognize that the state government, the state board, MDE, ISDs, traditional public schools, charter school authorizers, and the general public have

differing perspectives and expectations regarding the role of the PSA unit. It is also important to be aware that some of these stakeholders have significantly different opinions within their own ranks. In our opinion these differences are primarily caused in large measure by a lack of knowledge, poorly written state statutes crafted by special interests within the various stakeholder groups, and inconsistent expectations. Thus, the leadership of the PSA unit, and those that influence that leadership, must work continuously to satisfy external stakeholders who are often at odds with each other.

Unfortunately, the environmental reality is extremely frustrating for the leadership and staff of the PSA unit, especially as it struggles to maintain a level of fairness, consistency, and adherence to the law. The illustration cannot be made more clearly than the apparent conflicts between the AGs' (offices of the Attorney General and Auditor General). It is the PSA unit's opinion that one has consistently supported a political end advocated and supported by the state's largest authorizers which minimizes MDE's influence. This perspective largely ignores MDE's oversight role as defined by Michigan's Constitution because specific statutory language addressing a specific issue is absent. Unfortunately, that same office does not appear to be consistent even when statutory language appears clear. The other office embraces the expectation that MDE will execute rigorous oversight, regardless of the lack of clear and unambiguous statutory language even when other evaluators have validated the PSA unit's precarious position.

However, the staff and leadership of the PSA unit continue to work toward a fair and consistent application of state and federal law, and the initiation and maintenance of apolitical, pragmatic policies and procedures that make sense even when the law does not specifically address the respective issues.

2. Mission

This section addresses the portion of the STRATPLAN that must include a narrative expanding and further clarifying the mission statement. The mission statement is:

"Through rigorous oversight and technical assistance, the PSA unit provides leadership in the development and maintenance of high quality school options to better meet the educational needs of Michigan communities, now and in the future."

The PSA unit recognizes that it has two roles that must be expanded in order to be successful. Since the PSA unit is the undisputed repository of knowledge regarding public charter school operations, it makes sense that the unit would assume a leadership role in all things relating to school options, especially as it relates to the development and maintenance of high quality PSAs. Recognizing that the ultimate and all-encompassing stakeholder group for educational

outcomes is our communities, the PSA unit strives to work with all community stakeholders (i.e., governmental entities, businesses, churches, neighborhoods, families, and students) to ensure educational options satisfy their needs and desires, now and into the future.

a. MDE and Hierarchical Missions

The State Board of Education/Michigan Department of Education's Mission: All students graduate ready for careers, college, and community. The Office of Education Improvement & Innovation (OEII) promotes student learning and achievement by providing statewide leadership, guidance, and support over a wide range of programs that have a direct impact on teaching and learning, school leadership, and continuous school improvement.

This STRATPLAN includes activities and objectives that support both of the State Board of Education Priorities, especially as it relates to improving students achievement in low performing schools. This STRATPLAN also includes activities and objectives that support MDE's priorities involving achievement gaps and creating unique and innovative teaching practices to improve learning outcomes.

b. Unit Functions

A review of the roles of the PSA unit (oversight and technical assistance) targeted for expansion requires an understanding of the current activities. Aside from the federal CSP grant management program which is not programmed for expansion, a list of current activities is as follows:

Oversight

The PSA unit currently performs this function in a number of program areas including the Authorizer Assurance and Verification Program and the Charter Contract Review & Maintenance Program. These programs are largely focused on ensuring that authorizers perform their own PSA oversight responsibilities and to ensure that the Education Entity Master is properly maintained through the charter contract update/modification and review process.

Future opportunities for authorizer oversight include ensuring charter contracts are adhered to, that all contracts and contract amendments are legal, and that no authorizer without a proven track record of success can authorize additional PSAs or the expansion in the number of schools within existing PSAs.

Future opportunities for PSA oversight include insuring Academy Boards properly perform oversight functions such as the approval and maintenance of vendor and facility lease contracts, thereby eliminating conflicts of interest or related party transactions.

And finally, future opportunities could also include the assumption of oversight and monitoring responsibilities for priority schools, with the ability to reconstitute or close low performing PSAs prior to movement to the EAA.

Technical Assistance

The PSA unit currently performs this function in a number of program areas including the Authorizer Assurance & Verification Program, the Charter Contract Review & Maintenance Program, and the Technical Assistance Program. These programs are largely focused on ensuring that new authorizers are aware and understand their own PSA oversight responsibilities. The PSA unit also provides a series of technical assistance including the Authorizer 101 program, the monthly Webinar program, and the daily interface with stakeholders that seek answers through email or telephone communications, or in personal interactions.

Future opportunities for expansion include providing mandatory training that is designed to bring a new authorizers or existing under-performing authorizers up to a minimum level of capacity. This program may involve an “authorizer certification” program that may include a decertification process for authorizers that fail to properly follow the law or fail to implement and execute policies and procedures designed to maintain a portfolio of high performing schools.

Future opportunities may also involve support to low-performing PSA schools including the assumption of monitoring, coaching, mentoring and other support. The assumption of additional responsibilities with low performing schools may include the development of an aligned consolidated application and subsequent reviews and approvals.

And finally, opportunities for future expansion include the assumption of responsibility for several other programs currently in place within or contracted by other offices within MDE. A potential opportunity exists with the assumption of the Priority PSA School Monitoring Program, the Statewide System of Support Program for PSA Priority Schools, the Seat-Time Waiver Program, the Boarding School Program, and the Non-Public School Program.

c. Potential Alternative Futures

When contemplating potential alternative futures it is important to understand the purpose of this process. The process is designed to envision that alternative future state with the expressed purpose of conducting what has been referred to as a “gap analysis.” Simply put, a gap analysis attempts to compare the alternative future with the current state, identify differences,

and then considering what activities would have to take place to cause those differences to occur. This analysis also requires the thoughtful and careful consideration of trends, assumptions, and current environment. It is also helpful to understand the planners perspective about the rate of change expected. Stated another way, do planners expect change to come in the form of phyletic gradualism or to be more similar to a form of punctuated equilibrium. Since this plan only extends through 2019, and the effects of politics are ever-present considerations, this STRATPLAN does not expect major statutory changes that will significantly impact the current environmental state.

Therefore, this STRATPLAN will consider three alternative futures recognizing change that will be incremental with few, if any, significant events occurring over the course of the next five year. These alternative futures are:

(1) The development of the first alternative future considers all assumptions to be true as presented. This alternative future recognizes that MDE continue to be stifled in its ability to exercise oversight responsibilities over all charter authorizers and management companies. That lack of comprehensive and coherent statutory reform with regard to MDE and charter authorizers will continue to be an impediment to ensure authorizers with portfolios of under-performing schools do not continue to grow. This alternative future does not change the PSA unit's duties, responsibilities, or its staffing. Oversight and technical assistance for PSAs will continue to be fragmented and dispersed throughout MDE, with responsibility for support and assistance to Priority PSA schools also being dispersed and fragmented in the same way.

(2) The development of the second alternative future also considers all assumptions to be true as presented. However, the second future considers some minor statutory changes that may have an impact on MDE's oversight responsibilities. One such change will provide MDE with the ability to effectively provide constitutionally-required oversight of charter authorizers, and another will provide clarity about the future of poor-performing PSA schools as it relates to potential movement to the EAA. Over time, responsibilities for providing a wide range of services to under-performing PSA schools are either transitioned directly or liaisons are established with the PSA unit to coordinate and align support structures. The PSA unit transitions to an office named "The Office of School Options." This new School Options Office will assume responsibility for a number of programs involving school options that are currently residing within other offices at MDE.

(3) The development of the third alternative future also considers all assumptions to be true, with some assumptions occurring early, thereby allowing some specific trending areas to change more rapidly, exceeding expectations. This future considers some statutory changes that increase MDE's power and authority significantly as it relates to oversight of charter authorizers, PSAs, management companies, especially where low-performing PSA schools are involved. Statutory changes requiring transparency and increased scrutiny with contracting, management company operations, and related party transactions are enacted for the expressed purpose of ensuring state aid and grant funds are managed and expended in the best interest of students. This alternative future also involves the creation of a new office structure with the same, if not expanded, responsibilities as those described in paragraph (2) above.

With the recognition that most organizational change comes gradually, the PSA unit believes the second alternative future is most likely. Therefore, this STRATPLAN will follow the path to the second alternative but it will, on occasion, recognize opportunities to exploit situations, either described directly or alluded to, in movement toward the third alternative.

d. Trigger Points

In this document, trigger points are defined as points in time where a given environmental condition requires a decision to be made. Arriving at a metaphoric "fork in the road", or a "detour", or at a more critical point when organizational values are tested. Ironically, at some level, minor trigger points are addressed every single day by every single staff member. Through a unity of mission and shared expectations the PSA unit does not have to spend time or energy on addressing these minor trigger points as they are handled routinely and with little fanfare or drama because "that is who we are and how we do it." Success or attainment of a future alternative state will be evaluated as specific trigger points are addressed. Ultimately, the most important trigger points are as follows:

- (1) Statutory changes addressing MDE's oversight responsibility over charter authorizers.
- (2) Statutory changes addressing MDE's oversight responsibility over charter management companies.
- (3) The creation of the new Office of School Options.
- (4) The transition of coaching and mentoring responsibility from the School Improvement Unit, Office of Education Improvement & Innovation to the PSA unit or its successor.

- (5) Statutory changes addressing MDE's oversight responsibility especially as it relates to transparency, including charter contracts, management and lease agreements, and websites.
- (6) The increased ownership of PSAs by ISDs, especially as it relates to support, more specifically including revenue resource allocations and distributions.
- (7) The improved coordination and support of PSAs by specific offices within MDE that have been openly hostile to PSAs and the PSA unit, or its successor.
- (8) Recognition by all of Michigan's various stakeholder and special interest groups that PSAs offer communities quality education options.
- (9) The transition of some specific PSA-support activities from other MDE offices to the PSA unit or its successor.
- (10) The MDE's successful receipt of the federal CSP grant for 2015-2020.
- (11) Increased budget allocations or staffing for the PSA unit granted by the state legislature.

Special Note: As was alluded to earlier, the reader should be aware that not all trigger points are of equal impact or equal consequence. The eleven trigger points mentioned above are not listed in any specific order or in any specific priority.

3. Execution

This section addresses the implementation of this STRATPLAN. Since it is impossible to know for sure what will happen well into the future, the developers of this STRATPLAN seek to fulfill the expectations of the most reasonable of the Alternative Futures which we have identified as the Second Alternative Future described earlier. In selecting this particular alternative future the STRATPLAN Goals must be supported by a series of objectives and then a list of specific activities to achieve them.

a. Objectives & Activities

Objectives may be identified as a short-term objective (STO) or a long-term objective (LTO). For the purposes of this STRATPLAN, STOs have a time frame of two years or less and LTOs are more than two years. Activities are not assigned a duration.

Objectives

The objectives considered for this STRATPLAN are as follows:

- Publicize the mission and vision of the PSA unit to external stakeholders (STO),
- Improve products and services to stakeholders (LTO),
- Develop program initiatives that enhance school support and increase student achievement (LTO),
- Facilitate improved communications and relationships between ISDs and PSAs (LTO),
- Help Priority PSA schools move permanently out of the 4th quartile on the Top to Bottom list (LTO),
- Increase media releases that focus on student growth (STO),
- Strengthen relationships and increase visibility with USED (STO),
- Identify and target opportunities for internal collaboration (LTO),
- Develop a periodic review cycle for internal systems improvement (STO),
- Develop continuous and meaningful communications between MDE, the legislature, schools and other stakeholders (LTO),
- Write a quality federal CSP grant application (STO),
- Provide PSAs with the technical assistance necessary to help them better understand MDE/CEPI/CIMS systems and reporting requirements (LTO),
- Increase the production of reports about what is happening in PSAs (LTO),
- Provide PSAs with an awareness of products and services available from the PSA unit (or its successor) and other elements of MDE (STO),
- Create a staff development schedule that includes training on current and pending statutes in specific areas of need (STO),
- Ensure maximum access and use of available data to inform decision-making (LTO),
- Minimize the conflicting agendas with stakeholder groups by helping them to be more aware, informed, or enlightened (LTO),
- Increase and improve oversight of charter authorizers and PSAs (LTO), and
- Identify and work to codify statutory language that permits the PSA unit (or its successor) to meet the highest expectations of all stakeholders (LTO).

Activities

The following list of activities is not all inclusive and should not be considered as such. However, it is the list of activities that will be evaluated.

- Create and distribute information bulletins that promote products and services provided by or available from the PSA unit (or its successor),
- Take the extra step on follow-through with requests channeled to other offices within MDE,
- Publish accurate and timely reports and then market them to external stakeholders, especially the legislature,
- Invite Experts from areas outside of the PSA unit to assist the PSA unit with new webinars, video casts, and conferences,
- Create new ways to reach the field (e.g., Moodle, podcasts, etc.),
- Create manuals and Frequently Asked Question (FAQ) documents to assist the field,
- Create a systems and processes manual for the Department Analyst position,
- Brainstorm with external stakeholders to facilitate the development of a quality federal CSP grant application for the 2015 round,
- Develop and report new types of data to evaluate school performance, especially as it relates to growth and improvement measurements,
- Locate and develop new data analysis capacity, either internal to MDE or external through a contract,
- Create ongoing training programs for new school leaders and staff,
- On a targeted basis, attend other office, unit or program training workshops for the purpose of increasing PSA unit capacity in specific areas, especially special education, CMS, MEGS, GEMS, CIMS, etc.,
- Present at USED's annual State Education Agency (SEA) Workshop to increase MDE's visibility,
- Share best practices with other SEAs via the SEA Exchange,
- Target collaborative efforts with other offices to fill gaps in services needed by stakeholders,
- PSA Unit Supervisor will work diligently to "play nice" with the unit's external detractors, and to help change their attitudes and behaviors.
- Plan and conduct a series of PSA-focused cross-training activities with other offices within MDE designed to improve support to PSAs,

- Place information about the PSA unit's (or its successor) mission on external communications,
- Expand the scope of technical assistance efforts and targeted resources toward supporting marginally performing PSAs,
- Survey PSAs on ISD performance for the purpose of measuring the gap between performance and expectations,
- Maximize the field's access to information about high achieving schools,
 - Curriculum
 - Classroom activities/structure/management
 - Strategic planning, leadership strategies, board involvement
 - Continuous improvement practices
- Publish a "On A Roll" list of PSA schools that have improved on the TtB list over the last several years, and
- Create a prioritized list of preferred changes to statutory language along with the rationale for each change.

b. Implementation Philosophy

From a very pragmatic perspective, it is far easier and less resource intensive for PSA unit leadership and staff members to perform some activities by simply "tweaking" existing somewhat related internal systems and processes. It is far more difficult when a new system or process must be created, or when successful activity completion is dependent almost entirely on the support of other entities. And sometimes, it is extremely difficult to successfully complete an activity when that other entity is openly adversarial or lacks the capacity to recognize the activity's importance, or the courage or will to make the identified changes.

The PSA unit believes that needed changes can be accomplished within schools and at the MDE level, even when faced with adversarial forces, if a plurality of all stakeholders are informed of the facts as they exist. Therefore it is incumbent upon the PSA unit (or its successor) to be aggressive in its information distribution and make every effort to add to the decision-making capacity of those individuals and entities whose support of the necessary is critical. The PSA unit is uniquely qualified to act in this way as at the time of publication, all (six) managers and consultants are experienced central office personnel. Additionally, of the six managers and consultants, five have been public school principals.

To the extent possible, the PSA unit will refrain from all political activities. That does not mean that the unit will not attempt to influence those holding political office, but it does mean that the acts of gaining influence will not be political in nature, but in the form of building trust,

demonstrating honesty, and promoting a singular focus on the best interest of students.

c. Evaluation Priorities

It should be clear to any reader that success will not be defined by the typical governmental process of building a larger bureaucracy or by adding new “hoops to jump through.” Nor should the PSA unit (or its successor) be evaluated based on the overly simplistic method of calculating the percentage of how many listed activities were accomplished, or how what percentage of the goals that were ultimately accomplished. Evaluation priorities should be defined by what the PSA unit believes is most important and relevant to the unit's mission: student achievement, school performance, and authorizer portfolio management. At the time this STRATPLAN was initially formulated, the PSA unit was not directly or indirectly responsible for any of those three metrics. As such, the PSA unit is seeking to have a greater impact on all three, especially as it relates to under-performing PSA school students and charter authorizers maintaining portfolios of those same low performing schools.

Unlike some charter school advocates, the PSA unit (or its successor) does not believe that success is determined when charter schools perform marginally better on an annual standardized test than resident traditional public schools. When a charter school is compared to a similar school within their resident districts, one wins and one loses. When a school “wins” this competition and can only show that half of its students are proficient, winning seems to be based on a false premise. The PSA unit staff and leadership believe that success occurs when every student, regardless of their socioeconomic status, their ethnicity, or the resources the adults entrusted with the responsibility for their education receive, has an opportunity to achieve their fullest potential and demonstrates that opportunity by significant academic growth.

And finally, it is important for the PSA unit (and its successor) to examine new data metrics and new potential areas for examining school options. It is also important to recognize that this STRATPLAN is unique in its formulation and development. It is our hope that this STRATPLAN will become a model for other units and offices as we strive to become more intentional in the work we do and the outcomes we expect and will measure.

4. Service & Support

This section of the STRATPLAN addresses the service and support necessary for the PSA unit (or its successor) to be successful in achieving its goals and objectives, as well as completing the activities associated with those same goals and objectives. In large measure, service and support will have to come from a small number of stakeholder groups including the legislature, the SBE, the chain of command within MDE, and a plurality of ISDs. While there are other stakeholders that may have some level of influence and whose support could be beneficial, it is not clear if their support is actually a prerequisite or a necessity. Additionally, there are a number of special interest groups that have strong lobbying power with the legislature. Therefore, any attempt to influence the legislature will have to consider those special interest groups, either in terms of garnering their support or mitigating any potential negative influence. Since political persuasion is not within the scope of the PSA unit's work, influence will have to be garnered through the provision of direct and honest reporting of information or through the work of others.

a. Resources

The primary resources required to support this STRATPLAN are staffing and travel costs which will either come in the form of additional travel allocations or through cross-office coordination and collaboration. These funds may come from grants, especially the federal CSP, School Improvement and Title I Program grants, and then from the State General Fund. Staff being moved to the new Office of School Options from other offices within MDE will bring their current funding sources with them. New staff being hired or contracted to support school improvement efforts will come from the School Improvement Grant. New staff hired or contracted to support the improvement of student achievement will be funded by Title I. New staff hired or contracted to coordinate and work with the Office of Field Services in consolidated application efforts will be funded by Title I. If new staff members are required to assume the School Reform Office responsibilities with respect to Priority PSA schools, State General Funds will be used. The associated travel costs for each of these additional staff members will be shared between their primary funding source and the federal CSP grant, depending on the work being completed.

b. Coordination

For the complete transfer of responsibilities to the PSA unit (or its successor), unit leadership will coordinate with the other elements of MDE to ensure a smooth transition, especially when it involves the movement of MDE staff members currently working in other areas outside of the PSA unit. This coordination will include a close-out performance review for

existing personnel by the previous supervisor, a transfer of historical records related to the program being moved, and the movement of current documents to a workspace that is contiguous with the current location of the PSA unit staff. These transitions will occur as close to the start of a new fiscal year as possible.

When the transfer of responsibilities involves contractors under a valid contract, the PSA unit (or its successor) leadership will work with the current contracting entity to shift contract management responsibilities to the PSA unit (or its successor) as soon as it makes logistical sense to do so. The transfer of funds to support the contract will also include projected travel costs and depending on the location of the work, other miscellaneous expenses.

When the transfer of responsibilities involves the performance of work previously completed by contractors, but no valid contract currently exists, the PSA unit (or its successor) leadership will work with the previous contracting entity (if there is one) to shift contract management responsibilities to the PSA unit (or its successor unit) as soon as it makes logistical sense to do so. The transfer of funds to support the work will also include projected travel costs and depending on the location of that work, other miscellaneous expenses.

c. Collaboration

When it is not possible for the transfer of responsibilities to the PSA unit from other offices within MDE, a collaborative partnership will be created that involves the development of an engagement team including members of two or more offices, including at least one representative from the PSA unit. This PSA unit representative will work with representatives of other offices to ensure that a consistent and coherent support plan for targeted schools is created and resourced.

Once the engagement team is formulated and in operation, the PSA unit representative will work diligently to coordinate and synchronize support efforts within the PSA unit. At present, support decisions are being made by a plethora of other offices within MDE without a single entity ensuring unity of mission and task accomplishment/evaluation. More specifically, if an under-performing school operates within a PSA, logic would dictate that the PSA unit has the necessary knowledge and experience to manage the process most effectively. This type of collaboration will reduce redundancies, minimize distractions, target activities, and provide a single, responsible point of contact for all related activities. While it is expected that the initial focus will be with Priority schools, we can envision

the program expanding to all charter schools in the bottom quartile of the Top to Bottom list.

5. Communications

This section of the STRATPLAN addresses the requirements for communicating and receiving communications. As the PSA unit looks forward toward expansion it will be important for stakeholders to have a clear understanding of the PSA unit's duties and responsibilities as well as an awareness of what it isn't responsible for. To that end, it will be necessary for the PSA unit to gather feedback, develop and analyze surveys, and to provide periodic evaluations of unit progress. It will also be necessary to publish and distribute these items to ensure the general public as well as some specific stakeholders recognize the work being done and the progress being made. And finally, it will be very important for the PSA unit to have institutional capacity to develop comprehensive and coherent reports that will help stakeholders in their individual and collective decision-making processes.

a. Feedback, Surveys & Evaluations

In anticipation of this STRATPLAN development the PSA unit has conducted a comprehensive external stakeholder survey and more recently, a short survey of authorizers. The results of those surveys indicate several things. First, the results indicate that the field is overwhelmingly satisfied with professionalism and timely responses from the PSA unit regarding technical and operation questions across a wide spectrum of educational issues. The second significant result is the positive response to the PSA unit's monthly webinar series and recent technical assistance efforts with new school development teams and new authorizers, especially when technical experts from outside the PSA unit are involved. The last item suggests a lack of knowledge on the part of some survey respondents as to role and responsibilities of the PSA unit as some expectations far exceed statutory authority. The PSA unit will continue to use outside sources for the creation and analysis of major surveys with the next survey planned to gauge the feelings and/or perceptions of customers.

b. Publication & Distribution

The publishing and distribution of data, information, and reports regarding PSA performance is important to PSA unit stakeholders. Furthermore, the depth and validity (both internal and external) of these items helps to inform decision-making, debunk myths, and in some cases, reinforce perceptions, both positive and negative. The integrity of these reports is also important which means the PSA unit (regardless of the perspectives of the unit leadership or individual staff members) should be seen as

neither PSA advocates nor detractors, but merely has honest brokers of accurate information.

Therefore this data, information, and reports should be provided the widest distribution possible. In doing so, decision makers will have accurate and timely information to make the best possible choices. The PSA unit believes that an informed public makes better decisions, thereby minimizing the impact of special interest groups and those that would propagate misinformation or disinformation for personal or professional gain. Thus, distribution of these collections of data and information will be posted on our website, included in webinars, podcasts, and video casts, sent directly to stakeholders via email, and in some cases, published in written articles for general consumption to the extent allowable by MDE policy.

c. Credibility

The collection of data and information in the form of a written document can be described as a report. The publishing of reports is a time-consuming and sometimes tedious process, especially when the subject is sensitive or when the subject has strong supporters and strong detractors. And now that the charter school program is nearing its twentieth year in Michigan, there are some groups (and individuals) that make a living on operating charters or in saying/writing negative things about them, so before reading an article about PSAs in Michigan the reader should evaluate the author. Knowing the bias of the author should help the reader either add to or diminish the articles credibility. Therefore, it is important for Michigan's public education stakeholders to know that reports generated for or published by the PSA unit are unbiased, fair, and accurate.

vi. Summary

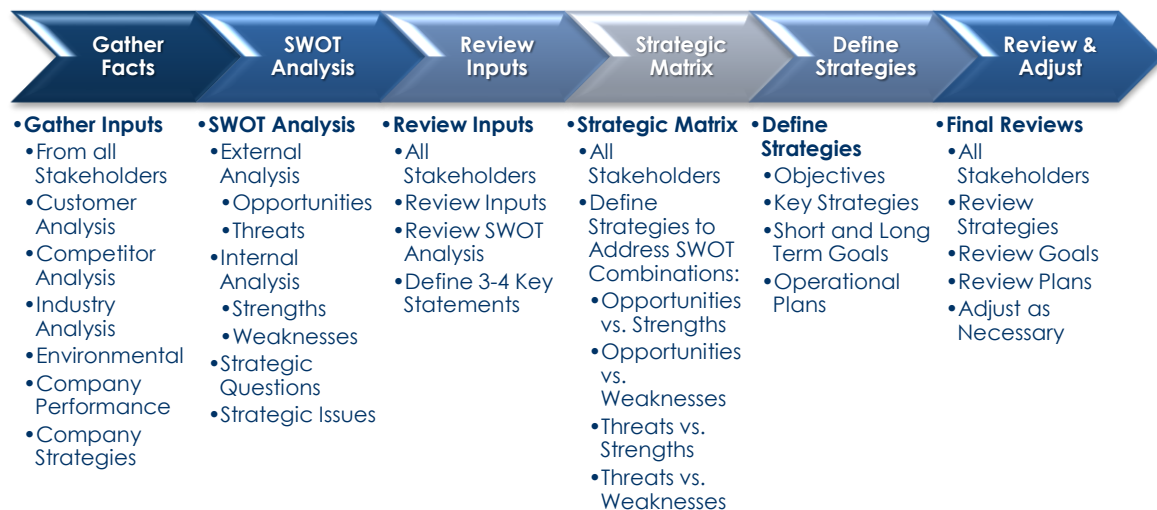
The PSA unit (or its successor) will work tirelessly over the next five years to have a positive impact on the performance of PSA schools and their students. Through a focused and intentional program of initiatives, the leadership and staff of the PSA unit (or its successor) will align revenues with priorities and direct that all organizational activities serve to achieve the stated goals and objectives of this STRATPLAN. Activities diverting from these interests will be avoided and tasks, products and services advancing the unit toward mission accomplished will be exploited whenever possible. While it is generally understood that the unit (or its successor) cannot be successful in these endeavors without the support of some very important stakeholders, the unit will continue to pursue success by avoiding obstacles and engaging in aggressive a communication & collaboration program, the garnering and appropriate targeting of resources designed to

increase unit capacity, a rigorous technical assistance program, and a public outreach program that are developed from personal commitments, partnerships and hard work. The unit contains a team of experienced, dedicated, and enthusiastic education professionals focused on providing every student in Michigan with the opportunity to reach their fullest potential. This STRATPLAN will provide the framework for the PSA unit's work well into the future.

Annex A

Strategic Planning Map

The purpose of illustrating the strategic planning process is to provide the visual learner with a picture. Unfortunately, depending on the maturity of the team, the approach described could be more or less linear. Mature teams tend to be more patient with processes and more willing to be disciplined in the execution of each step without attempting to “jump ahead” to a solution. Mature teams also tend to demonstrate a unit of mission focus that depends or expects to be involved in continuous improvement. Mature teams also tend to focus on outcomes that exceed their own personal goals, thereby putting team success ahead of personal success. Due to the fact that the facilitator of the strategic planning process for the PSA unit that developed this STRATPLAN was also the supervisor of the unit, he was able to modify the process to meet the needs of his team. Other facilitators and supervisors may find it difficult to follow the same process in exactly the same way, and should attempt to find modify the process in a way that works for their own team.



Annex B

Strategic Focus Hierarchy

The PSA unit began this process with an understanding that everything they do starts with the organization's mission, vision and values (MVV). While everybody on the team had a general idea of the foundational elements of the MVV, the development and refinement of those items was easier and required less time after most of the process was complete. Thus, in about five hours the PSA team was able to create a mission statement, a vision statement, and a set of values that were universally approved by every team member. The importance of understanding this graphic cannot be overstated as everything the team does should touch some stage of this graphic, otherwise, the team probably shouldn't be doing it.



Annex C

Goal, Objective, Activities Crosswalk

Area & Goals	Objectives	Activities
Area 1. Communication & Collaboration		
<p>Goal 1. Collaborate with MAPSA and other similar stakeholders to increase the unit's scope of influence and to provide needed support to the field</p> <p>Goal 2. Improve communications and resources to stakeholders</p> <p>Goal 3. Increase and improve communications and collaboration with other MDE units and offices</p> <p>Goal 4. Improve PSA/MDE/ISD/USED relationships and connections</p>	Strengthen relationships and increase visibility with USED (S)	Share best practices with other SEAs via the SEA Exchange
	Facilitate improved communications and stronger relationships between ISDs and PSAs (L)	Survey PSAs on ISD performance for the purpose of measuring the gap between performance and expectations
	Identify and target opportunities for internal collaboration (L)	Target collaborative efforts with other offices to fill gaps in services needed by stakeholders
	Develop continuous and meaningful communications between MDE, the legislature, schools and other stakeholders (L)	Take the extra step on follow-through with requests channeled to other offices within MDE
<p>Goal 5. Inform the right people about the PSA unit's legislative/statutory/procedural needs</p>	Publicize the mission and vision of the PSA unit to external stakeholders (S)	Place information about the PSA unit's (or its successor) mission on external communications
	Increase media releases that focus on student growth (S)	Publish a "On A Roll" list of PSA schools that have improved on the TtB list over the last several years
<p>Goal 6. Enhance statutory language to promote enhanced oversight by the PSA unit/MDE</p>	Increase and improve oversight of charter authorizers and PSAs (L)	Refine and Continuously improve Authorizer 101 and Authorizer Verification Programs
	Identify and work to codify statutory language that permits the PSA unit (or its successor) to meet the highest expectations of all stakeholders (L)	Create a prioritized list of preferred changes to statutory language along with the rationale for each change

Area & Goals	Objectives	Activities
Area 2. Unit Capacity		
Goal 1. Write a quality federal Charter School Program (CSP) grant , and will receive grant funding to support the development of high quality PSAs, and if unsuccessful will seek and receive alternative funding to support a similar grant program	Write a quality federal CSP grant application (S)	Brainstorm with external stakeholders to facilitate the development of a quality federal CSP grant application for the 2015 round
Goal 2. Utilize MDE technical systems whenever possible to efficiently streamline workflow efforts	Develop a periodic review cycle for internal systems improvement (S)	Create a systems and processes manual for the Department Analyst position
Goal 3. Work to be more cognizant and knowledgeable of federal and state legislation as it relates to school options, especially PSAs.	Create staff development schedule that includes trainings on current and pending statues in specific areas of need (S)	Plan and conduct a series of PSA-focused cross-training activities with other offices within MDE designed to improve support to PSAs
		On a targeted basis, attend other office, unit or program training workshops for the purpose of increasing PSA unit capacity in specific areas, especially special education, CMS, MEGS, GEMS, CIMS, etc.
		Provide a detailed analysis of pending legislation through staff collaboration and inter office relationships

Area & Goals	Objectives	Activities
Area 3. Technical Assistance		
Goal 1. Improve access and modalities for technical assistance	Provide PSAs with an awareness of products and services available from the PSA unit (or its successor) and other elements of MDE (S)	Create and distribute information bulletins that promote products and services provided by or available from the PSA unit (or its successor) Create manuals and Frequently Asked Question (FAQ) documents to assist the field
	Ensure maximum access and use of available data to inform decision-making (L)	Create new ways to reach the field (e.g., Moodle, podcasts, etc.)
	Goal 2. Improve low performing PSAs and improve the quality and quantity of data that reflects their growth	Improve products and services to stakeholders (L)
Develop program initiatives that enhance school support and increase student achievement (L)		Maximize the field's access to information about high achieving schools <ul style="list-style-type: none"> • Curriculum • Strategic planning, leadership strategies, board involvement • Classroom activities/structure/management • Continuous improvement practices
		Develop and report new types of data to evaluate school performance , especially as it relates to growth and improvement measurements
Help Priority PSA schools move permanently out of the 4 th quartile on the Top to Bottom list (L)		Expand the scope of technical assistance efforts and targeted resources toward supporting marginally performing PSAs
Goal 3. Help to create a better understanding of MDE/CEPI systems and corresponding reporting requirements	Provide PSAs with the technical assistance necessary to help them better understand MDE/CEPI/CIMS systems and reporting requirements (L)	Invite Experts from areas outside of the PSA unit to assist the PSA unit with new webinars, video casts, and conferences

Area & Goals	Objectives	Activities
Area 4. Public Outreach		
Goal 1. Address anti-PSA perceptions by providing timely and unbiased reports, and by directly addressing misperceptions with data that the public can understand	Increase the production of reports about what is happening in PSAs (L)	Locate and develop new data analysis capacity, either internal to MDE or external through a contract Publish accurate and timely reports and then market them to external stakeholders, especially the legislature
	Minimize the conflicting agendas with stakeholder groups by helping them to be more aware, informed, or enlightened (L)	PSA Unit Supervisor will work diligently to “play nice” with the unit’s external detractors, and to help change their attitudes and behaviors