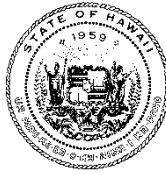


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BRUCE D. VOSS  
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**STATE OF HAWAII  
BOARD OF EDUCATION**  
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February 2, 2023

TO: Board of Education

FROM: Bruce D. Voss  
Chairperson, Board of Education

AGENDA ITEM: Update on draft Hawaii Public Education 2023-2029  
Implementation Plan template (Phase II)

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## **I. BACKGROUND**

The Board of Education ("Board") has undergone an intense strategic planning process, which includes two phases.<sup>1</sup> The development of the strategic plan is the first phase and the development of an implementation plan is the second phase.

As the Board neared completion of the strategic plan, it started to contemplate the role of the implementation plan and how it fits into the overall structure.<sup>2</sup>

## **II. IMPLEMENTATION PLAN UNDERSTANDINGS**

At a January 19, 2023 Special Meeting, Board members reviewed and were asked to provide feedback on a draft implementation plan template. During the course of this discussion and the discussion on the language in the goals and desired outcomes, the Board and Department came to an understanding on several important concepts that should be memorialized. These understandings provide

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<sup>1</sup> See Board Chairperson Bruce Voss's memorandum dated February 2, 2023, here: [https://boe.hawaii.gov/Meetings/Notices/Meeting%20Material%20Library/Special\\_20230202\\_Action%20on%202023-2029%20Strategic%20Plan%20%281%29.pdf](https://boe.hawaii.gov/Meetings/Notices/Meeting%20Material%20Library/Special_20230202_Action%20on%202023-2029%20Strategic%20Plan%20%281%29.pdf)

<sup>2</sup> See November 17, 2022 Special Meeting minutes here: <https://alala1.k12.hi.us/STATE/BOE/Minutes.nsf/a15fa9df11029fd70a2565cb0065b6b7/e3a4b4c47cb14aee0a258913007201d2?OpenDocument> ("[t]he Board needs to tell the Department what it wants to see and the Department will tell the Board how it will do it.")

guidance in the Department's development the implementation plan and the Board's review of the Department's work.

Strategy Expectations. The draft implementation plan template provides, "[t]he superintendent maintains the authority to determine the Department's strategies in the Implementation Plan to achieve the goals and desired outcomes in the Strategic Plan. The superintendent will consider the Board's input when determining the Department's strategies." Strategies include things like requiring specific curriculum in subjects like financial literacy or computer science or mandating models, like community schools. The understanding is that if Board members provide input on specific strategies, they should not automatically expect to see those strategies in the implementation plan.<sup>3</sup> The superintendent will determine which strategies are best and Board members should respect those determinations.

Internal Work Documents. The implementation plan will include strategies and measures, which will broadly describe how goals will be achieved and how progress will be tracked. The Board and Department will likely need to develop and maintain internal work documents that will include a description of specific actions, work timelines, projected costs, risk assessments, risk management plans, or roles and responsibilities for executing strategies and achieving goals. The Board will not formally review or approve any of the Department's internal work documents. The Board and its committees may ask the Department to share more specific information about its work or its plans to ascertain whether the plan is effective and to provide comment, but the documents will not need to be approved by the Board.<sup>4</sup>

Single Implementation Plan. The goal was to create a single document with a strategic plan and a single implementation plan.<sup>5</sup> The implementation plan will have the Board taking the lead on some strategies and the Department taking the lead on others.

Focused Board Agendas. The Board will focus its agendas on strategic plan goals and give the highest priority to agenda items that most significantly move progress on the goals.<sup>6</sup>

### **III. CHANGES TO COMMUNICATIONS PLAN**

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<sup>3</sup> See January 19, 2023 Special Meeting Minutes here:

<https://alala1.k12.hi.us/STATE/BOE/Minutes.nsf/a15fa9df11029fd70a2565cb0065b6b7/f5fc55e3897de91b0a258944006fb91a?OpenDocument2023> (k12.hi.us)

<sup>4</sup> *Id.*

<sup>5</sup> *Id.*

<sup>6</sup> *Id.*

The discussion at the January 19, 2023 Special Meeting did not result in any changes to the implementation plan template, particularly since Board members were asked to provide comments on the concepts and structure, but not necessarily the specific language used. I considered feedback from the Department's Communications Office on the communications plan (Section III of the draft implementation plan) and made some revisions reflected in the redline attached as Exhibit A. The changes are more specifically described below:

1. The Department's website was included as an additional way to communicate with the general public in the "what and how" column.
2. In order to provide flexibility in the development and tailoring of the messaging, the communications plan was amended so that when messaging is going out from the Communications Office to employees, families, and the general public, the messaging is developed by the Communications Office and approved by the Board Chairperson. Previously, all messaging was developed by the Board Chairperson.
3. There was a distinction made between the Department's weekly newsletter (which has a wider distribution) and the Department's monthly newsletter (which only goes to active Department employees).

Note that the revisions do not show formatting changes, just language changes.

Because the actions in the Communications Plan will need to be executed soon after approval of the strategic plan, I would like Board members to come to a consensus on the Communications Plan.

**Exhibit A**

Draft Implementation Plan Template

# STATE OF HAWAII PUBLIC EDUCATION

## 2023-2029 STRATEGIC PLAN (PHASE II)

FEBRUARY 2, 2023

### I. IMPLEMENTATION PLAN STRUCTURE AND AUTHORITY

**Implementation Plan Components.** This Board of Education (the “Board”) and Department of Education (the “Department”) designed this implementation plan (the “Implementation Plan”) to make meaningful progress toward achieving the goals and desired outcomes in the *State of Hawaii Public Education 2023-2029 Strategic Plan* (the “Strategic Plan”). The Implementation Plan contains the following components:

- Evaluation and accountability (key performance indicators and processes for monitoring progress, evaluating success, and reporting results);
- Communication plan;
- Alignment of agenda setting, budgeting, and advocacy;
- Strategies and measures;
- Process for revising the Implementation Plan; and
- Process for initiating the next strategic plan.

The Implementation Plan does not include specific actions, work timelines, projected costs, risk assessments, risk management plans, or roles and responsibilities for executing strategies and achieving goals. The Board and Department’s respective internal work plans may contain these components.

**Structure and Definitions.** The Strategic Plan is structured around priorities, goals, and desired outcomes. The Implementation Plan builds on this structure by adding key performance indicators, strategies, and measures. These key terms are defined below and the hierarchy and relationships are depicted in **Figure 1**.

A “strategy” represents a theory of action developed to make progress toward achieving a goal in the Strategic Plan. Each strategy in the Implementation Plan is associated with a single goal in the Strategic Plan, and each strategy is associated with at least one or more desired outcomes from the Strategic Plan. A goal may have more than one strategy to achieve it, and a strategy may lead to more than one desired outcome.

A “key performance indicator” (or “KPI”) is a primary measure of success for a goal within the Strategic Plan. Each goal has at least one KPI, and every KPI has a target that the Board and Department will strive to reach during the duration of the Strategic Plan. A KPI target is specific, measurable, achievable, relevant to the associated goal, and time-bound.

A “performance measure” is a quantitative or qualitative measure that helps the Board, Department, and stakeholders track progress toward and/or attainment of a desired outcome in the Strategic Plan. Each desired outcome has an associated performance measure. Typically, performance measures have targets. A performance measure target

is specific, measurable, achievable, relevant to the associated desired outcome, and time-bound and may be based on deliverables or milestones.



**Figure 1**

Authority. The Board and Department collaborated on the Implementation Plan with the Board having final approval authority over the Implementation Plan and any revisions to it. The superintendent maintains the authority to determine the Department's strategies in the Implementation Plan to achieve the goals and desired outcomes in the Strategic Plan. The superintendent will consider the Board's input when determining the Department's strategies.

Internal work plans with detailed information on how to execute the Implementation Plan do not require Board approval.

## **II. EVALUATION AND ACCOUNTABILITY**

Key Performance Indicators. KPIs are the primary measures of success in achieving the goals in the Strategic Plan, and the Board and Department strive to meet the targets for each of the KPIs in pursuit of those goals. However, it is important to note that meeting the targets is not the objective; achieving the goals is the objective, and the KPIs help the Board and Department determine if they are on the right track to achieve the goals.

The table below provides the KPIs and their respective baselines and targets for the entire term of the Strategic Plan. The Board and Department may adjust the targets annually as necessary; however, the KPIs will remain the same.

[\*Insert key performance indicators]

**Annual KPI Evaluation.** The Board and Department will establish baselines and targets for the KPIs during the 2023-2024 school year.<sup>7</sup> Annually thereafter, the Board and Department will evaluate the progress on the KPIs relative to the set targets.

While KPIs are the primary measures of success, meeting a KPI target does not necessarily mean the Board and Department made adequate progress toward achieving a goal, nor does failing to meet a KPI target necessarily mean the opposite. A KPI is the main signal of where the Board and Department stand in meeting the relevant goal, but it is by no means the only signal nor does it tell the whole story. When analyzing KPI results, the Board and Department need to consider contextual factors, including conditions for success (e.g., availability of funding) and other data, such as performance measure data.

The superintendent will present both the KPI results and an analysis of the results for the Board to review annually.

**Monitoring and Periodic Reporting.** The Board's standing committees are responsible for periodically reviewing at least twice annually the progress and effectiveness of the relevant strategies in achieving the desired outcomes and reporting to the Board as follows:

- The Student Achievement Committee reviews the progress and effectiveness of the strategies related to the goals under Priority I: High-quality Learning for All.
- The Human Resources Committee reviews the progress and effectiveness of the strategies related to the goals under Priority II: High-quality Educator Workforce in All Schools.
- The Finance and Infrastructure Committee reviews the progress and effectiveness of the strategies related to the goals under Priority III: Effective and Efficient Operations at All Levels.

Over the course of the meetings, each committee will review the progress in achieving their respective goals. In collaboration with the superintendent, the committee chairpersons will establish the schedules for reviewing the progress and effectiveness of the respective strategies.

The superintendent, in consultation with the Board chairperson, will establish a standardized status report format to provide to the committees for the periodic reviews and will publish all status reports on the Department's website.

**Annual Reporting.** The superintendent will present an annual report to the Board on Strategic Plan progress. The annual report will contain the KPI results and analysis and an analysis on the progress and effectiveness of all strategies in achieving the desired outcomes to date. In addition to presenting the annual report to the Board, the superintendent will transmit it to any key stakeholder the Department identifies as an important partner to achieve the goals and desired outcomes of the Strategic Plan.

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<sup>7</sup> Baselines and targets may be quantitative or qualitative. Some KPIs may require the Department to collect new data and/or develop new data systems. Developing new data systems may take the Department multiple years to design, secure funding for, and implement prior to quantitative data being available. With this in mind, the Board and Department may not be able to establish baselines and targets for some KPIs until later years.

**Annual Superintendent Evaluation.** The Board and superintendent will mutually agree to an annual superintendent evaluation that incorporates progress on the Implementation Plan and Strategic Plan goals.

**III. COMMUNICATION PLAN**

When	Who		What and How
	Sender	Receiver	
Upon approval of Strategic Plan	Board Members	General public	Communicate Strategic Plan by informing individuals and organizations about the plan whenever possible
	Board Support Office	General public and attached agencies	Communicate Strategic Plan using messaging developed by the Board Chairperson and distributed via a Board press release, Board website, and agenda mailing list
	Department Communications Office <a href="#">("Communications Office")</a>	Department employees	Communicate Strategic Plan using messaging developed by the <a href="#">Board Chairperson Communications Office and approved by the Board Chairperson</a> and distributed via Department website, <a href="#">weekly Department newsletter, monthly Department employee newsletters</a> , and social media
		Families	Communicate Strategic Plan using messaging developed by the <a href="#">Board Chairperson</a>



When	Who		What and How
	Sender	Receiver	
			<a href="#">Communications Office and approved by the Board Chairperson</a> and distributed to principals with instructions to distribute to families and distribute messaging via social media
		General public	Communicate Strategic Plan using messaging developed by the <a href="#">Board Chairperson Communications Office and approved by the Board Chairperson</a> and distributed via <a href="#">Department website, the weekly Department newsletter,</a> and social media
Upon approval of Implementation Plan	Board Members	General public	Communicate Implementation Plan by informing individuals and organizations about the plan whenever possible
	Board Support Office	General public and attached agencies	Communicate Implementation Plan using messaging developed by the Board Chairperson and distributed via a Board press release, Board website, and agenda mailing list
	Department	Department	Communicate

When	Who		What and How
	Sender	Receiver	
	Communications Office	employees	Implementation Plan using messaging developed by the <a href="#">Board Chairperson Communications Office and approved by the Board Chairperson</a> and distributed via Department website, <a href="#">weekly Department newsletter, monthly Department employee newsletters</a> , and social media
		Families	Communicate Implementation Plan using messaging developed by the <a href="#">Board Chairperson Communications Office and approved by the Board Chairperson</a> and distributed to principals with instructions to distribute to families and distribute messaging via social media
		General public	Communicate Implementation Plan using messaging developed by the <a href="#">Board Chairperson Communications Office and approved by the Board Chairperson</a> and distributed via <a href="#">Department website, the weekly Department</a>

When	Who		What and How
	Sender	Receiver	
			newsletter, and social media
At least twice annually Strategic Plan status reports	Board Members	General public	Communicate Strategic Plan status reports presented at board standing committee by informing individuals and organizations about the reports whenever possible
	Board Support Office	General public and attached agencies	Communicate Strategic Plan status reports presented at board standing committee meetings messaging developed by the Board Chairperson and distributed via the Board website, and agenda mailing list
	Department	Board standing committees	Strategic plan status reports presented at Board standing committee meetings (for Desired Outcomes that are primarily Department implemented)
	Department Communications Office	Department employees	Communicate Strategic Plan status report using messaging developed by the <a href="#">Board Chairperson Communications Office</a> and approved by the <a href="#">Board Chairperson</a> and distributed via Department website,

When	Who		What and How
	Sender	Receiver	
			<a href="#">weekly Department newsletter</a> , <a href="#">monthly Department employee newsletters</a> , and social media
Throughout the year	Board Members, Board Support Office, and Communications Office	General public in all complex areas	Board strategic plan community meetings in each complex area to get feedback on strategic plan progress
Annual Strategic Plan status report to Board	Board Members	General public	Communicate annual Strategic Plan status report to Board by informing individuals and organizations about the annual report whenever possible
	Board Support Office	General public and attached agencies	Communicate annual Strategic Plan status report to board using messaging developed by the Board Chairperson and distributed via the Board website, and agenda mailing list
	Department Communications Office	Department employees	Communicate annual Strategic Plan status report to Board using messaging developed by the <a href="#">Board Chairperson Communications Office</a> and approved by the <a href="#">Board Chairperson</a> and distributed via Department website, <a href="#">weekly Department</a>

When	Who		What and How
	Sender	Receiver	
			<a href="#">newsletter, monthly</a> Department employee newsletters, and social media
		Families	Communicate annual Strategic Plan status report to Board using messaging developed by the <a href="#">Board Chairperson Communications Office and approved by the Board Chairperson</a> and distributed to principals with instructions to distribute to families and distribute messaging via social media
		General public	Communicate annual Strategic Plan status report to Board using messaging developed by the <a href="#">Board Chairperson Communications Office and approved by the Board Chairperson</a> and distributed via <a href="#">Department website,</a> <del>the</del> <a href="#">weekly</a> Department newsletter, and social media

**IV. ALIGNMENT OF AGENDA SETTING, BUDGETING, ADVOCACY**

**Board Agenda Setting.** The Board chairperson and committee chairperson’s will place on their respective agendas only matters that advance the goals and desired outcomes in the Strategic Plan and execute the Implementation Plan unless the matter is

necessary to comply with an applicable law or is related to public charter schools or public libraries. Each agenda will identify the specific goal of the Strategic Plan to which each item aligns (unless the matter is necessary to comply with an applicable law or is related to public charter schools or public libraries).

**Budgeting.** The Board and Department will ensure that all of the Department's fiscal resources and budget requests serve to execute the strategies of the Implementation Plan with the exception of budget items necessary for compliance with applicable laws.

**Advocacy.** The Board and Department will advocate for policies, resources, and partnerships that help with the execution of the Implementation Plan and advance the goals and desired outcomes of the Strategic Plan.

## V. STRATEGIES AND MEASURES

[\*Insert the Board and Department's strategies and performance measures]

## VI. PROCESS FOR REVISING THE IMPLEMENTATION PLAN

**Annually.** The Board and superintendent will review the Implementation Plan annually to determine if any adjustments are necessary to the KPI targets, strategies, or performance measures. The Board and superintendent may consider revisions to other parts of the Implementation Plan; however, to ensure consistency among the fundamental components of the Implementation Plan, the Board will avoid revising, as much as possible, the plan structure (as described in section I.B.) and KPIs (except KPI targets).

The superintendent may recommend revisions to the Implementation Plan to the Board for consideration. The review will take place after the annual KPI evaluation.

**Extenuating Circumstances.** The superintendent may request the Board's approval of revisions to the Implementation Plan at any time if there is an extenuating circumstance that requires the Department to pivot strategies prior to the next annual process for revisions.

## VII. PROCESS FOR INITIATING THE NEXT STRATEGIC PLAN

**Planning Committee.** By June 30, 2026, the Board chairperson will select a planning committee made up of Board and Department staff. The planning committee will develop a proposed plan for the development of the next strategic plan, including a timeline that meets the strategic planning cycle deadlines described in section VI.B. In developing the proposed plan, the planning committee will consider whether an outside project manager or facilitator needs to be procured, the stakeholders involved and to what extent, the scope and scale of public engagement, and a proposed schedule of Board meetings that ensures the Board has input at every key stage of the strategic planning process and multiple chances to review important proposed concepts.

The planning committee, through the Board chairperson, will provide the proposed plan to the Board for consideration by June 30, 2027.

**Strategic Planning Cycle.** The Board will conduct its initial strategic planning discussion by August 31, 2027. The Board will adopt the next strategic plan by December 31, 2028, to be effective July 1, 2029.