

Contract 4.0 Feedback Session
Summary Report

Prepared for
Hawai'i State Public Charter School Commission

by

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Introduction

The State Public Charter School Commission (SPCSC) is Hawai'i's statewide charter school authorizer, responsible for ensuring public charter schools meet rigorous academic, financial, and organizational performance standards. The SPCSC comprises appointed commissioners who provide governance, oversight, and strategic direction, and a professional staff who implement policy, monitor school performance, provide support, and manage the charter school application and renewal processes. Together, they uphold a balanced approach to accountability and school autonomy.

Contract 4.0 is the current version of the charter school performance contract and serves as a binding agreement between the Commission and each charter school. It outlines the terms, conditions, and performance expectations schools must meet, aiming to align accountability measures with schools' unique missions while promoting transparency, equity, and quality education for all students.

The upcoming November 2025 contract renewal process for 13 charter schools provides the SPCSC a timely opportunity to operationalize its Stakeholder Engagement Plan (February 2025, Regional Educational Laboratory Pacific). This plan represents a broader commitment to establishing more meaningful and systemic stakeholder engagement in SPCSC-led initiatives. To enlist stakeholder feedback, six facilitated feedback sessions were conducted in April 2025. In addition, an online survey captured responses from SPCSC staff, commissioners, and the charter school community.

This report was prepared to address two elements of the SPCSC's engagement plan:

1. To document and synthesize stakeholder feedback gathered through sessions as well as the online survey; and
2. To present findings that can inform the renewal process and support both SPCSC staff and commissioners in their decision-making.

The table on the following page (Table 1) summarizes five takeaways, along with strategies, and ideas that emerged from analysis of the feedback sessions and online survey responses. Next steps are also provided as actionable suggestions to address stakeholder feedback:

- Perceived value (and utility) of Contract 4.0 among stakeholders
- Need for greater clarity, detailed guidance, and relevant training related to the performance frameworks
- Perceived misalignment between the frameworks and charter school missions, operations, and comparability
- Challenges with data, processes, implementation & timing of frameworks requirements
- Strong interest in fostering deeper collaboration among schools

The first four themes relate directly to how Contract 4.0 is implemented – specifically the authorizer's role in balancing oversight with autonomy, and in offering technical guidance to support schools' understanding and compliance with performance expectations. The fifth theme,

while not specific to the contract, was a consistent theme across all feedback sessions and reflects a broader need to strengthen school capacity, which ultimately supports stronger contract performance.

One of the most significant observations from the feedback sessions and online survey responses was the consistent recognition of the substantial progress that has been made, and the relationship-building efforts of the frameworks team. While there are still improvements that stakeholders feel can be made – and the degree of critique ranged across the stakeholders – many acknowledged the effort and intent behind these developments and expressed appreciation for the direction taken. The author also observed the nuanced role the frameworks team must play in navigating the balance between holding schools accountable and supporting their autonomy; this complexity underscores both the challenge and value of the team's work. Importantly, the team's commitment to building trust and fostering open, supportive relationships with schools has been a crucial factor in shifting mindsets and broadening how school leaders perceive and engage with the contract – not simply as a compliance tool, but as a potential lever for growth and innovation.

Finally, the author notes that as the November timeline for the contract renewal process approaches, the window to fulfill the commitments outlined in the Stakeholder Engagement Plan – particularly the responsibility to report back and respond meaningfully to stakeholder input – is quickly closing. Given the complexity and importance of the feedback raised, allowing more time with a short delay in launching the renewal process to thoughtfully address these ideas and provide schools with clarity may be worth considering.

Summary of key findings

Takeaway	Strategies/Ideas	Next steps to consider
<p><u>Value and utility of contract 4.0</u></p> <p>While often viewed through a lens of accountability and compliance, the contract and frameworks also hold substantial perceived value and utility for schools in various operational, governance, and strategic contexts. Shifting from its use as a compliance checklist to a growth tool was linked to positive relationships with the SPCSC frameworks team, and their work to increase school clarity and understanding of the metrics. Stakeholder comments also consistently reference an appreciation for the improvement and progress of contract 4.0, the frameworks, and related processes.</p> <ul style="list-style-type: none"> • “We use the framework as a roadmap and platform for courageous conversations” • “It feels like a gotcha, not a tool” • “...has [contract 4.0] limited me? No... is [contract 4.0] preventing me from achieving our WHY? No.” • “I think this contract is a large improvement over other variation[s] of the contract. It is respectful of charter schools in being able to put our mission and our values at the forefront of the contract. I feel the commission has been very supportive in help[ing] schools respond to this contract.” 	<p>Continue to position the frameworks team as supports that empower schools to reflect their values and strengths while still meeting accountability expectations</p> <p>Actively use the frameworks as a guide to drive school systems, policies and procedures was presented as a best practice</p>	<p>Develop and share case studies or profiles of schools using frameworks creatively for innovation and internal growth, not just external evaluation</p> <p>Include a “strategic use spotlight” in trainings/ communications that highlights best practice applications of frameworks</p>
<p><u>Tensions and challenges: Improve clarity, detailed guidance, relevant training</u></p> <p>Schools also expressed strong appreciation for the frameworks team, but wanted more clarity as to expectations of the Commissioners. In addition, schools expressed a desire for more clarity on responses (particularly with the academic framework) to help guide expectations and ensure responses are sufficient.</p> <ul style="list-style-type: none"> • “The Framework team helped save our school” • “We want tools, not just ratings” • “As a new ED, I don’t know where we are currently scoring” • “...the expectations for performance and renewal are stated clearly, though not with enough detail for someone to fully understand the process without having gone through it themselves” 	<p>Develop and publish exemplars, rubrics, checklists, annotated templates, training videos, powerpoints for schools</p> <p>Create SPCSC staff-facilitated technical assistance-oriented sessions for schools and governing boards (and include Commissioners)</p>	<p>Convene a small working group of school leaders and SPCSC staff to co-design exemplars and rubrics</p> <p>Pilot training videos with 2-3 schools and revise based on feedback</p> <p>“Contract 101” for new school leaders and governing board</p>
<p><u>Tensions and challenges: Perceived misalignment between frameworks and charter school missions/operations and comparability</u></p> <p>While schools expressed appreciation for the Mission Aligned Indicator (MAI), discussion on StriveHI was critical (it “puts us in a box,” “it’s not relevant for us”)</p>	<p>Expand MAI to allow more nuanced or tailored submissions of evidence by schools that better reflect their diversity</p>	<p>Establish a working group with SPCSC staff and school leaders to explore the idea of (additional, optional, improving) academic</p>

<p>and articulated challenges with demonstrating accountability while also upholding a school's foundational purpose (where measures of student success align to a school's mission). Schools expressed the desire to compare with schools of similar demographics or use alternative comparison groups (instead of within their complex area). For smaller schools, the weightedness of data means one child can significantly impact metrics, and incorporating measures that account for student growth was a salient theme in nearly all sessions.</p> <ul style="list-style-type: none"> • “We are accountable to state standards AND it goes against why we exist in the first place” • “Indicator #3: Can we compare to other similar schools as an option? For example, high SpEd school to other SpEd schools... we have 30% special education population [and will always be dinged]” • “We struggle with #2, it puts us in a box we are trying to escape from” • “While our charter emphasizes ‘student-centered learning’ education, developing the ‘whole child’ and ‘joyful learners...engaged in a democratic society,’ the framework allocates 70% of required points to standardize test performance and only 30% to mission-aligned initiatives” 	<p>Re-evaluate the “weightedness” of StriveHI, explore alternative metrics (e.g. highlight student growth as a measure within StriveHI)</p> <p>Improve methodologies to allow for comparison based on factors like student demographics, geographic context, size (not just complex area)</p> <p>Incorporate context-sensitive metrics to adjust for small or rural schools, and/or address the effect of outlier data on scoring and its impact on small schools</p>	<p>indicators</p> <p>Scan national practices to identify (and consider adapting) promising approaches to accountability that accommodate school diversity and promote equity</p> <p>Include student growth, “weightedness” of StriveHI, comparison metrics as formal agenda items in the next framework revision process</p> <p>Develop a proposal to adjust the comparison metric</p>
<p><u>Tension and challenges: Data, processes, implementation and timing challenges with frameworks</u></p> <p>Several issues were mentioned, including manipulating data for reporting purposes (e.g. cash on hand), schools using other financial metrics for daily operations, limitations with using StriveHI data, and timing challenges (e.g. timing of receiving grant funds and reporting, max enrollment and the cycle of project-based learning, schools’ vulnerability to external factors that impact compliance tasks. In addition, stakeholders raised concerns about the interpretation of HRS §302d and areas where contract 4.0 may not be aligned.</p> <ul style="list-style-type: none"> • Cash on hand metric: (year end) LESS (year beginning) = positive, why do year 1 funds have to be less than year 2 funds, less than year 3 funds, etc? We game the system to end up with more funds at the end of year, potentially impacts spending” • “Metrics are designed for the end of the year – this timing does not work for daily operations” • “Project-based curriculum not conducive for mid-year enrollment. But the admissions cut-off date is unclear/misaligned (9.4 contradicts with 2.1). Implications are that [we] move away from the mission and it is hard to prepare for.” 	<p>Audit data reporting processes within frameworks for timing misalignments</p> <p>Provide clarifying guidance to schools on how to reconcile raised issues (particularly those pertaining to impacts by external factors)</p> <p>Conduct comprehensive legal and policy review of §302d and Contract 4.0, highlighting areas stakeholders have identified</p>	<p>Establish working group to review areas of potential misalignment between §302d and Contract 4.0, present findings to schools</p> <p>Map out a typical school year and overlay reporting deadlines to find timing stress points</p> <p>Compile FAQ/process guidance to schools on reconciling common challenges (e.g. HR, safety)</p>
<p><u>Ideas/Strategies: Desire for stronger collaboration among schools</u></p> <p>Schools inquired if the SPCSC staff could help facilitate opportunities to</p>	<p>Establish “hubs” for schools to share resources, co-train, co-solve centralized challenges</p>	<p>Survey schools to identify priority topics for collaboration and</p>

<p>collaborate, share resources, and collectively navigate common challenges (e.g. HR, safety protocols, understanding union issues) – not just among schools, but also among Commissioners to learn about the schools’ unique missions, characteristics, and student populations they serve</p> <ul style="list-style-type: none"> • “Could we pool resources to help each other? Schools from east and west [Hawai’i] come together quarterly? What other networks are happening [that we can participate in]? Need a person to coordinate convenings” • “Is there an opportunity for governing boards to meet to build capacity with HR and financials?” • “Commissioner site visits – want them to see us – can charter school commission staff help facilitate their (commissioners) awareness of our schools?” 	<p>(e.g. HR, safety, compliance)</p> <p>Coordinate convenings for governing board members to learn about their role and responsibility, share resources, and how to utilize contract 4.0 with their school leadership</p>	<p>support</p> <p>Coordinate and schedule regular (monthly, quarterly) community of practice forums</p>
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Table 1: Summary of main takeaways from feedback sessions and online survey responses, with accompanying quotes. Note: the strategies and ideas articulated in column two were derived by pulling from stakeholder feedback and comments, and suggested based on stakeholder feedback. Potential actionable next steps were also articulated. A more detailed list of suggestions/ideas/strategies is provided in the Findings Section.

Methodology

The engagement process was a two-phased approach: an online survey and a series of feedback sessions. Together, these data sources offer complementary perspectives on stakeholder understanding, perceptions and lived experiences with Contract 4.0.

The survey established a broad, quantitative understanding of how schools relate to the contract and frameworks, while the feedback sessions offered a space to interpret and expand on those findings. Both methods together supported the overarching goal: to evaluate and enhance the clarity, relevance, and usability of contract 4.0 in service of meaningful accountability and school autonomy.

Central inquiry question

The SPCSC staff wanted to explore Contract 4.0 by focusing specifically on the Academic, Organizational, and Financial Performance Frameworks with stakeholders. These participants were primarily charter school leaders and Governing Board members, as well as SPCSC staff. To inform the contract renewal process, the initial driving question was: How do charter schools (leaders and governing boards) perceive, experience, and utilize Contract 4.0 and its associated Performance Frameworks?

Discussion with SPCSC staff articulated the objective to utilize the feedback sessions to identify areas for improvement. The primary inquiry question emerged as: what are some ways to improve the clarity and efficiency of the academic, financial, and organizational frameworks in Contract 4.0?

To capture a broad snapshot of how stakeholders understand and engage with contract 4.0 and its associated performance frameworks, an online survey was also developed by SPCSC and distributed to charter school leaders, SPCSC staff and commissioners. The survey aimed to quantify levels of understanding and gather stakeholder perspectives on the relevance and comprehensiveness of the frameworks. The survey included both close-ended questions (e.g. likert scale ratings) and open-ended prompts to allow respondents to elaborate on their experiences and insights. Questions were organized around two primary domains:

- Understanding of Contract 4.0 – assessing stakeholder familiarity with the contract, confidence in applying its components, and clarity around expectations.
- Perceptions of the performance frameworks – examining whether the frameworks are seen as reflective of the full scope of a charter school’s mission, priorities, and impact.

Online survey

The survey was administered online via Google Forms and remained open for six weeks (March 11 - April 28, 2025). A total of 53 responses were received: 32 from schools, 16 from SPCSC staff, and 5 from commissioners. Of the school responses, the majority of respondents were

School Leaders (68.8%), followed by Governing Board Chairs (12.5%) and Governing Board members (12.5%). Parents (12.5%), school staff (9.4%), community members (9.4%), and charter school affiliated nonprofits (6.3%) also participated, providing a diverse range of perspectives.

Feedback sessions

Feedback sessions utilized a dialogic facilitation approach grounded in principles drawn from several underlying theoretical foundations:

- **Appreciative Inquiry** (Cooperrider et al, 2008), which centers dialogue on generative questions and shared values rather than problem-finding;
- **Emergent Design in Focus Group Methodology** (Löhr et al, 2020; Morgan, 2008), allowing participant-driven discussion while maintaining facilitator-guided cohesion;
- **Graphic facilitation** (Kennedy, 2019; Hautopp and Ørngreen, 2018; Scott and Hutchison, 2024), which supports visual sensemaking and inclusive participation when facilitating group processes;

The objective was to foster a meaningful, objective, and structured-yet-flexible space for stakeholder reflection and input, with the aim of generating rich qualitative input that reflected stakeholder perspectives in a holistic and synthesized manner.

Six feedback sessions, 2 hours in duration during weeknight evenings, were conducted over 2 weeks in April: O'ahu (2), Kaua'i (1), Hilo (1), Kona (1), and virtual from the SPCSC office (1). Participants were invited by the SPCSC staff. Overall, a total of 46 participants attended the six sessions, predominantly attended by school leadership and governing board members (18 governing board members, 20 school leaders, 7 school staff, 1 SPCSC staff):¹

- 4/14 @ SEEQS (O'ahu): 1 school admin, 1 school staff
- 4/16 @ WHEA (Kona): 4 school admin, 1 school staff, 2 governing board members
- 4/17 @ Ka 'Umeke (Hilo): 4 school admin, 1 school staff, 3 governing board members
- 4/22 @ DreamHouse (O'ahu): 2 school admin, 2 school staff, 1 governing board
- 4/23 @ Kawaikini (Kaua'i): 1 school admin
- 4/28 @ Zoom: 8 admin, 2 school staff, 12 governing board members, 1 SPCSC staff

A slide deck was used to provide context for the discussion including the overall timeline of the contract renewal process, and to communicate initial findings of the online survey.

Using the primary inquiry question as a guide, the discussion during these feedback sessions emerged organically from participants' contributions. Prompting questions were offered when necessary to re-center the conversation and prevent tangential divergence.

A distinguishing feature of this method was the use of real-time graphic facilitation. As participants spoke, comments and notes were visually recorded to capture key insights, phrases, and emerging themes on a whiteboard in full view of the group. This technique

¹ SPCSC executive leadership were also present at all feedback sessions, but not included as part of the total counts.

enhanced transparency, validated participant input, and fostered collective meaning-making by allowing the group to see their contributions reflected and interconnected. The visual record also served as a tangible artifact of the session, and was used to transcribe for further synthesis and analysis.

It should be noted that while discussions about specific contract language were anticipated, the overall objective of the feedback sessions was to create space for dialogue that could generate ideas and strategies to support the effective implementation of Contract 4.0 – actionable input and insights that SPCSC staff could directly use to enhance how the contract functions in practice and better support schools. This intention shaped the development of the primary inquiry question, which helped keep the conversation grounded in shared goals and practical improvements. Discussions of detailed interpretations were still noted (and are presented) as they are important, however, they were not the focus of the feedback sessions.

Copies of the graphic facilitation notes, and coded transcription of feedback session notes is provided as part of Appendix A. Participants were informed their comments and feedback would be gathered and analyzed as part of the engagement plan process for Contract 4.0.

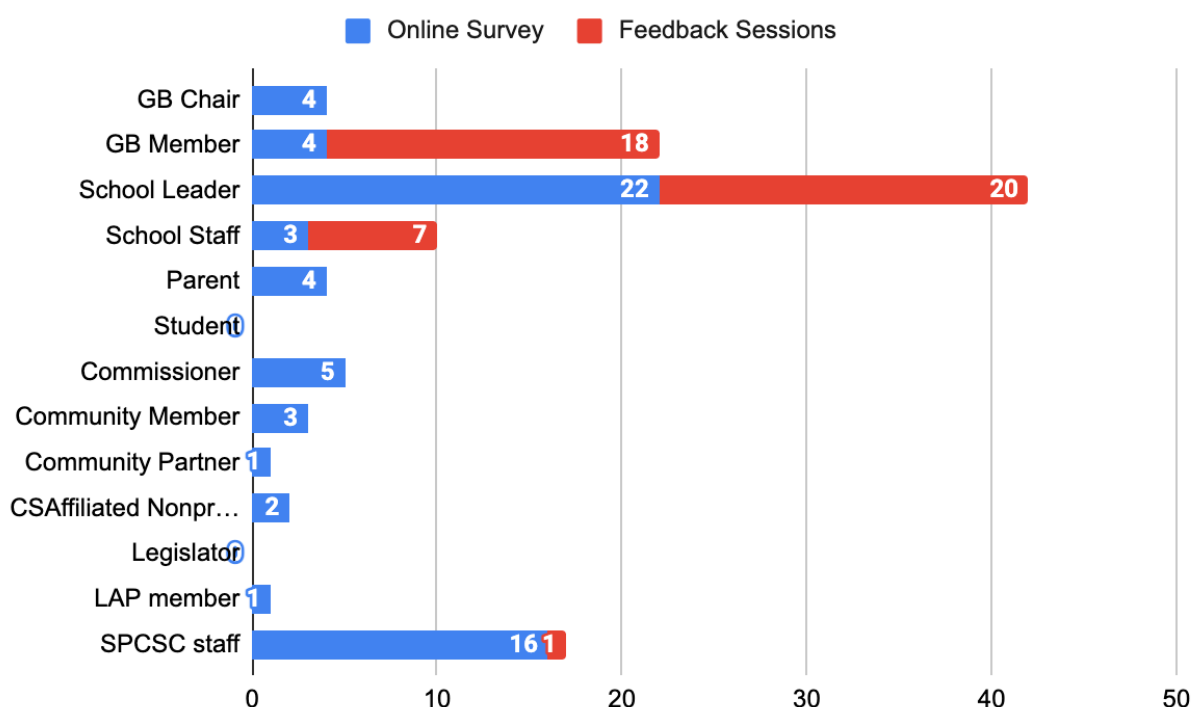


Chart: summarizing the responses by stakeholder role group, for feedback sessions and online survey responses.

Analysis

To grasp the details in the data in a coherent and organized way, a thematic analysis strategy was used for the qualitative section of this report (Braun & Clarke, 2006). The goal of thematic analysis is to understand and articulate common themes across multiple points of input. The

results of the online survey were analyzed using basic descriptive statistics for quantitative items (captured and compiled in Google Sheets).

The following process was used to code and analyze participant comments:

1. Feedback session notes were transcribed and reviewed (transcription is presented in order of session and not importance)
2. Open ended responses from the online survey were also transcribed and reviewed.
3. Transcribed comments from participants were then arranged by themes and categories. A coding key with definitions was also established (see table):
 - a. Theme: Clarity
 - i. Category: Communication and feedback loops
 - ii. Category: Comprehension of indicators, process, feedback, contract
 - b. Theme: Efficiency
 - i. Category: Usability of framework
 - ii. Category: Alignment with school mission
 - c. Theme: Points of tension
 - i. Category: Equity & Comparison
 - ii. Category: Autonomy, flexibility of metrics
 - d. Theme: Opportunities
 - i. Category: Ideas/strategies
 - ii. Category: Questions to address/resolve
4. Various phrases were then highlighted in different colors corresponding to different codes. These colors represent coding schema, or labels to assign to specific pieces of data in the text.
5. Feelings that were captured from comments were also articulated in a third column

Limitations

While the feedback sessions provided valuable insights, there are several important considerations regarding the sample size. First, the perspectives captured may not fully represent the diversity of experiences and viewpoints across the broader charter school community. As participation was limited, certain stakeholder groups may not have been fully reflected. The counts could have been skewed as the same stakeholders could have participated in both the feedback sessions, as well as submitting online survey responses.

Additionally, the open-dialogue format, while conducive to rich discussion, may have allowed more vocal participants to shape the conversation more prominently than others. Though every effort was made to create an inclusive and balanced space, the influence of group dynamics is an inherent limitation of small-group engagement.

Finally, while the qualitative nature of the feedback provides depth and context, it does not lend itself to broad generalizations or statistical analysis. As such, the findings should be viewed as directional rather than comprehensive, offering meaningful guidance for future engagement and implementation efforts rather than definitive conclusions.

To account for the limitations inherent in the sample size and format, several strategies were employed to enhance the inclusiveness, balance, and utility of the feedback process:

- Diverse Outreach and Invitations: Efforts were made to engage a range of stakeholders from different geographic regions, school roles, and perspectives. While participation remained voluntary, outreach was guided by the goal of capturing a cross-section of the charter school community.
- Use of a Central Inquiry Question: The guiding question helped ensure that discussions remained focused on broad principles and shared goals, allowing for comparable insights across different sessions and reducing the risk of any single voice dominating the dialogue.
- Real-Time Documentation and Validation: The use of visual facilitation techniques – where participant input was captured and displayed in real time – helped participants see their contributions reflected accurately and encouraged clarification or correction when needed. This process supported transparency and helped validate the themes that emerged.
- Noting but Not Centering Contract-Specific Issues: While detailed comments on contract language were not the focus of the sessions, such input was still documented separately and preserved for SPCSC staff to review and follow up on. This approach ensured that technical concerns were not lost, while maintaining the strategic focus of the dialogue.
- Additional Feedback Channels: In recognition that not all stakeholders could participate in the sessions, additional opportunities for feedback were offered through the online survey.

Coding key

Label	Definition
A: Clarity	The degree to which the contract frameworks are clearly communicated and practically applicable to schools' unique contexts and operations
A1: Communication and Feedback loops	The processes and effectiveness of information exchange between schools and SPCSC staff or Commissioners regarding the performance frameworks and contract
A2: Comprehension of indicators, process, feedback, contract	How well schools (and governing boards) understand the expectations, actions, requirements, metrics, processes, indicators, and feedback provided within the performance frameworks and the contract
B: Efficiency	How well frameworks (and processes) are streamlined, minimize unnecessary work, integrate with school operations and timelines
B1: Usability of contract/frameworks	How easily schools can interact with and practically apply the frameworks, tools, and processes; how stakeholders feel about the utility (of frameworks)
B2: Value, purpose, and intent	Stakeholders' viewpoints about how well the contract, frameworks, processes, indicators, metrics align with unique missions, approaches of charter schools
B3: Acknowledgement of value	Statements acknowledging/appreciating the (improvement of/work on) frameworks, indicators, processes including framework team, contract 4.0
C: Points of Tension	The various challenges, frustrations, conflicts, and difficulties schools experience in relation to the performance frameworks and contract
C1: Equity & appropriateness of requirements	Concerns about fairness and how schools are evaluated relative to others, particularly when comparisons may not account for significant differences
C2: Autonomy, flexibility of metrics	Tension between the desire for independence and tailoring practices to unique missions and students & constraints imposed by metrics, frameworks
C3: Constraints of external dependencies	Reflections pointing to constraints imposed by factors schools may not have any control over that may influence/impact performance frameworks
D: Opportunities	Refers to suggestions stated for improvement, areas for collaboration, and ways the frameworks can support school growth and success
D1: Ideas/Strategies	Suggestions and proposed methods mentioned by schools to improve the frameworks, enhance their usability, or leverage them for school benefit.
D1A: Best practices	Suggestions provided that may reflect best practices, identified by research and/or practical experience
D1B: Weight tasks differently	Suggestions referencing the appropriateness of the "weightedness" of certain metrics (e.g. StriveHI, the APF, tasks listed in the OPF)
D2: Questions to address/resolve	Specific questions or areas of uncertainty raised by schools that indicate a need for further clarification, discussion, or resolution regarding the frameworks and contract

Findings

The feedback sessions provided insight into how stakeholders viewed Contract 4.0 (and its frameworks), areas to strengthen, tensions to pay attention to, and opportunities to continue to support charter schools. Key findings are articulated as four main themes that are detailed in the following sections.

1. Value and utility of Contract 4.0
2. Tensions and challenges
3. Ideas/Strategies
4. Questions/issues to resolve

Value and utility of Contract 4.0

Comments overall highlight that while often viewed through a lens of accountability and compliance, the contract and frameworks also hold substantial perceived value and utility for schools in various operational, governance, and strategic contexts. Stakeholder perspectives shared three primary functions:

- Accountability, evaluation, and compliance
A fundamental and widely recognized function of the contract is that of authorizer accountability and evaluation. Stakeholders primarily understand the contract and frameworks serve an evaluative purpose towards a “thumbs up or thumbs down” (Feedback session, 2025) for contract renewal.
- Operational guidance and internal planning roadmap
Beyond external accountability, school leaders and governing boards both acknowledge using the frameworks as a guideline for policies and procedures. Contract 4.0 is especially useful for new leaders, and governing boards are using it to clarify school procedures, onboard new members, and organize expectations. The frameworks are also used as a roadmap and platform for important conversations between school leaders and governing boards.
- Tool for school improvement and growth
An emerging function is the use of the frameworks as a “resource and tool that can assist with improvement” (Feedback session, 2025). One school credited the financial framework with having “helped save our school” (Feedback session, 2025). The Mission Aligned Indicator is valued for being a reflective process, helping schools evaluate their direction. This shift from viewing the frameworks as a compliance checklist to a growth tool was linked to positive relationships with the SPCSC frameworks team, and their work to increase school clarity and understanding of the metrics.

Tensions and challenges

This section highlights tensions and challenges of operationalizing contract 4.0 and its frameworks. The work of the SPCSC staff is, by nature, labor intensive in terms of cultivating and maintaining relationships and ensuring each charter school's leadership clearly understands expectations and requirements. Staff must be able to straddle several critical intersections: while these intersections appear binary, in reality they are constantly navigating along an "Accountability-Autonomy Continuum" (Feedback session, 2025).

- Balancing accountability with support for innovation and growth

A central theme across sessions was the tension between viewing the performance frameworks as compliance tools versus supports for school improvement. School leaders described a continuum of experiences shaped by leadership background, clarity of expectations, and the strength of their relationships with SPCSC staff.

Some schools perceived the frameworks—particularly during site visits or contract renewal—as checklist-oriented or externally driven, with compliance expectations that sometimes felt misaligned with their missions. Others found the frameworks, especially the Financial Framework and Academic Indicator 1A, to be valuable tools for strategic reflection and internal planning. The ability to shift from a compliance mindset to one focused on growth was often tied to the quality of engagement with SPCSC staff.

...It is whether [they] see contract 4.0 as a springboard for innovation (that does not limit us but guides us) or a ceiling (limiting what we do), and it can differ across new ED, new school, mature ED mature school operations (Feedback session, 2025)

Sustaining this balance will require continued clarity, consistency, and support from SPCSC. Schools emphasized the importance of seeing frameworks not only as mechanisms for accountability, but as opportunities for meaningful learning and development aligned with their unique missions.

- Accountability-Autonomy: Applying uniform metrics across diverse school models

Another recurring theme was the inherent tension between the application of standardized performance metrics (required by law) and the diverse, mission-driven nature of charter schools. Charter schools consistently expressed concern that uniform indicators (e.g. StriveHI) do not align with their distinct models, student populations, or educational goals, and critiqued the "weightedness" of StriveHI relative to the mission-aligned indicator.

There was also frustration over comparisons being drawn between vastly different schools. For instance, small or specialized schools (like those serving high populations of students with disabilities) felt that current metrics did not account for their unique contexts. Schools requested flexibility to compare themselves against more appropriate

peer groups and to incorporate growth-oriented or mission-specific indicators into the evaluation.

Similarly, metrics like Academic Indicator #2 were described as a “box we are trying to escape from (Feedback session, 2025),” as they felt incompatible with innovative or non-traditional approaches to teaching and learning. Specific contractual requirements – such as volunteer background checks or facilities rules – were also viewed as disproportionately burdensome depending on a school’s context, particularly for small or community-based programs. These conditions sometimes reinforced perceptions of inequity, particularly between start-up schools located on non-DOE campuses and conversion schools.

Despite these challenges, schools were not resistant to accountability. Rather, they expressed a desire for greater recognition of their contexts and requested the ability to demonstrate success through alternative or complementary measures, such as project-based assessments, culturally aligned indicators, or introducing a growth metric.

- Bridging SPCSC staff support and Commissioner decision-making for schools
Schools consistently expressed deep appreciation for the SPCSC staff, notably the frameworks team, for their responsiveness, clarity, and supportive approach; however, some reported a disconnect between staff-level guidance and Commission-level decision-making, especially during high-stakes reviews (e.g. renewal process). In a few instances, schools reported feeling confident after interactions with staff, only to be surprised by the tone or focus of questions during proceedings with Commissioners, particularly when new concerns such as academic data points were raised without prior discussion.

Stakeholders expressed interest in understanding how school-specific insights gathered by staff are shared with Commissioners, how consistency can be maintained across the various stages of oversight, and calibrating for coherence between formative support and summative evaluation.

Enhancing these communication channels – through more structured processes, shared briefing practices, or regular calibration – could help bridge this perception gap. Doing so may foster a greater sense of transparency and continuity for schools, while also supporting Commissioners in making well-informed, contextually grounded decisions that reflect the full spectrum of engagement between the SPCSC and its charter schools.

Ideas/Strategies

Comments that captured ideas and strategies were summarized along three main areas:

- Strengthen clarity and accessibility of framework guidance, training resources
Schools repeatedly shared a strong appreciation for the support offered by the SPCSC frameworks team, but emphasized a need for greater clarity – particularly around what Commissioners expect when reviewing school performance. Many expressed

uncertainty about how to interpret and meet the performance criteria in the academic framework, especially without prior experience in the renewal process.

Participants consistently voiced a need for more concrete, user-friendly guidance to navigate the performance frameworks – particularly the Academic Framework and Mission Aligned Indicator (MAI). Suggestions included developing exemplars, rubrics, and annotated checklists; adding prompts directly in framework documents; and recording informational sessions with access to slides for reference. Beyond the frameworks, schools requested shared access to resources and scheduling support for required trainings (e.g., Title IX, suicide prevention, active shooter response). SPCSC staff are well-positioned to provide clearer, more accessible materials and centralized resources that move schools from compliance confusion to confident, informed implementation.

- Tackle timing, data alignment, and implementation barriers

Operational misalignment between the contract frameworks and school realities surfaced across multiple sessions. Schools reported challenges in meeting deadlines that conflict with natural learning cycles, fiscal operations, or external funding schedules. For example, frameworks that expect consistent increases in year-end cash on hand can inadvertently encourage data manipulation or fiscal practices that aren't aligned with real-time school needs.

Additionally, issues with StriveHI timing, unclear cut-off dates for enrollment, and contradictions within the contract (e.g. sections 9.4 vs. 2.1) were seen as barriers to meaningful compliance. Some schools shared that these timing mismatches forced them to make compromises that moved them away from their core educational approach.

- Continue to improve communication channels between staff, schools & Commissioners

While schools expressed strong appreciation for the relationships and support provided by SPCSC staff, some participants noted that the understanding developed at the staff level does not always appear to fully carry through to Commission-level decision-making, particularly during high-stakes processes such as contract renewal. In these moments, schools reported feeling unprepared for shifts in emphasis or tone. To strengthen alignment and continuity, participants suggested that SPCSC staff might consider expanded efforts to support Commissioners' understanding of school contexts – such as through site visits, contextual briefings, or structured onboarding during periods of Commissioner transition. Strengthening these connections could help promote more consistent, transparent, and well-informed decision-making.

- Facilitate peer learning and collaborative capacity-building

There is strong interest among schools in learning from each other. Participants recommended the formation of Communities of Practice (CoPs) or Professional Learning Communities (PLCs) on shared topics such as HR, safety, financial management, and the use of online platform tools like Panorama. Schools also expressed a desire to align on alternative performance metrics that better reflect charter-specific outcomes. Perhaps SPCSC can support this collaboration by convening schools across islands, pooling

resources, and creating structures for sharing best practices – building collective capacity across the charter network.

The following table (Table 2) organizes the various suggestions provided by stakeholders aimed at improving the implementation and utility of the performance frameworks.

Framework	Suggestion/Strategy/Idea Presented
Academic	<p>Provide exemplars, rubrics, and checklists to guide MAI submissions</p> <p>Provide more guidance with MAI (1A and 1B) and expectations; define terms “basic,” “practice,” and “ingrained;” provide direction on what constitutes sufficient evidence</p> <p>Record zoom trainings, make presentation materials accessible for reference</p> <p>Allow comparison to similar schools instead of complex-area DOE schools (Indicator #3)</p> <p>Allow the option to incorporate more qualitative measures</p> <p>Evaluate narrative components with clear rubrics and strong consistency</p> <p>Revise Indicator #2 to (better) reflect student growth rather than absolute performance</p> <p>Evaluate scoring breakdown between Indicator 2 and MAI (“weightedness”) to better reflect mission/intent of charters</p> <p>Use portfolios, project-based assessments, and MAI as the core evidence for APF</p> <p>Be more specific with terms used, such as “make substantial progress towards achievement of the performance standards” and “demonstrate consistent improvement on overall score”</p> <p>Provide evaluation criteria for “meets/exceeds” and “does not meet”</p> <p>Clarify how the point system works; suggest removing points to reduce confusion (about whether it truly reflects the whole picture of a school’s performance)</p> <p>Ensure instructional models, assessments and learning outcomes of schools are explicitly reflected or evaluated in APF</p> <p>Expand non-academic indicators to include teacher retention, community engagement, and post-graduation outcomes</p> <p>Provide specific protocols and resources for connecting assessment findings to classroom interventions, particularly for struggling student populations</p> <p>Maintain the 100-point scale as a standard of basic proficiency, with supplemental points clearly differentiated as enhancement areas (rather than allowing them to obscure fundamental performance issues)</p>
Financial	<p>Include both revenue and expenditure variance in budget analysis</p> <p>Use a dashboard that crosswalks financial, academic, and operational data</p> <p>Create tiered intervention protocols based on financial risk labels</p> <p>Offer training and peer learning opportunities for financial management</p> <p>Establish both minimum and maximum ranges for unrestricted days cash</p> <p>Provide startup funding for rural schools to improve access and equity</p> <p>Incorporate debt service coverage ratio and occupancy cost analysis</p>

	<p>Expand audit scope to include state funds</p> <p>Create a verification system for submitted quarterly financials</p> <p>Provide clear contract language for nonprofit affiliates and facilities obligations</p> <p>Align reporting timelines with budget cycles and audit protocols</p>
Organizational	<p>Weight OPF tasks by importance (e.g. prioritize student safety over paperwork)</p> <p>Facilitate collaboration across schools for HR, safety, and compliance training</p> <p>Create differentiated OPFs for schools not on DOE campuses or with unique models</p> <p>Improve Kuleana Portal emails and ensure better alignment with school's workflow</p> <p>Clarify renewal process steps and timelines; provide checklists in advance</p> <p>Add a tiered evaluation scale beyond "meets/does not meet"</p> <p>Establish best practices document/resource that could benefit broader charter community</p> <p>Create shared training calendars for statewide compliance sessions</p> <p>Increase transparency on intervention or nonrenewal triggers</p> <p>Implement peer review or collaborative evaluation in OPF monitoring</p> <p>Review which sections of OPF are marked as "annual" versus "renewal" in Exhibit A to make sure expectations, requirements and "weightedness" of tasks are communicated clearly and consistently.</p> <p>Determine which OPF tasks are serious enough to lead to intervention or even nonrenewal and clearly articulate</p> <p>Incorporate more peer-driven evaluation components, provide opportunities for schools to learn from each other's operational practices</p> <p>Create differentiated expectations based on school age</p> <p>Incorporate proactive support mechanisms (operational capacity assessments, governance training resources, process improvement tools) to make the intervention approach less reactive and trigger correction plans earlier</p> <p>Clarify insurance carriers regarding what entities carry certain liabilities in the event of accidents/incidents that in needing coverage</p> <p>Look at bigger formatting for the worksheets provided in the exhibit</p>
Other	<p>Add hyperlinks in the contract for cross-referenced sections</p> <p>Develop a modular contract structure with core and school specific sections</p> <p>Address inconsistencies and errors: enrollment caps referenced in section 9.4 but not included in section 2.1</p> <p>School's vision mentioned in APF #1 but does not appear in contract itself</p> <p>Continue to make performance expectations across all frameworks as clear as possible, including how performance is assessed and what the consequences are for schools when it comes to interventions and renewal decisions</p>

	<p>Have frameworks developed [edited] by cohort of stakeholders in the charter community and seeking input from community as a whole</p> <p>Create accessible contract guidance materials (visual contract roadmaps, section-specific implementation guides, compliance checklists) to help school leaders</p> <p>Implement structured follow-up protocol with clear timelines for remediation of identified issues, including documented verification procedures and specific consequences for continued non-compliance</p> <p>Develop peer-mentoring system where experienced schools with strong compliance records support newer schools</p> <p>Restructure contract renewal process to include more incremental feedback opportunities rather than focusing exclusively on high-stakes evaluation points, helping schools identify and address potential issues before they become significant compliance concerns</p> <p>Embrace the principles of HAPA and apply them to contract negotiations</p> <p>Consider reviewing feedback from the work sessions - many people had ideas that were ignored. Get feedback from charter school leaders/governing boards.</p> <p>Address how post-high school outcomes are included for secondary schools</p> <p>Increase clarity regarding interventional protocol and renewal process – it is not always clear what crosses the line for a Notice of Concern, Notice of Deficiency, or potential nonrenewal</p> <p>Tighten up contract language of statutes and rules and apply consistent interpretation (show rubric for interpretation for transparency)</p> <p>Contract should specify performance targets or require disaggregated reporting for subgroups (English Learners, students with disabilities, other vulnerable populations)</p> <p>Explain in more detail the process of performance and renewal (expectations are clearly stated)</p>
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Table 2: list of strategies, ideas, suggestions provided by stakeholders. Organized by performance frameworks

Questions to resolve

This section presents a consolidated list of questions raised by stakeholders during the feedback sessions, as well as derived from online survey responses. All questions specifically raised by stakeholders are listed, even if they appear redundant. While some of the questions are explicitly stated, others represent ideas, suggestions, or comments that were posed in the form of questions to express concerns or propose improvements. Many of these align with the strategies and recommendations outlined in the previous section, and are consistent with the key takeaways identified in the data analysis.

The questions have been organized by area/concept within each framework to support SPCSC staff in identifying key areas for clarification, considerations, and potential action.

Academic Performance Framework

1. Questions about the academic performance framework:
 - a. When do schools receive intervention for academic performance during a contract term?
 - b. Where did the 73-point cutoff come from?
 - c. What are the evaluation criteria for “meets/exceeds” and “does not meet” in StriveHI and supplemental indicators?
 - d. Are supplemental points (indicators 3 & 4) giving too much influence on APF evaluation? Could these additional points create an overly positive picture of performance?
 - e. How are the characteristics of high-quality charters and innovation being applied to the APF?
 - f. How do we ensure schools keep up with the BOE policies (referenced in APF)?
 - g. What data is missing from the APF assessments? Who is not included in the data story?
2. Questions to help improve clarity of responses for indicators:
 - a. Where is the rubric that will get us to 20 points for the MAI?
 - b. Can we have exemplars and rubrics or a checklist of what to include?
 - c. Can we record Zoom sessions? Get the powerpoint? (to refer to later)
 - d. Can we have more prompts in the directions?
 - e. Can we have the option to explain our numbers? Have a space for a narrative?
 - f. Can we have links in the contract document to the referenced sections? (for example when one part of the contract says to reference another section, provide a link to go there)
 - g. How can we (in the wording of the contract) ensure schools have autonomy in regards to EL education
 - h. What happens if the qualitative measures we choose as a school may not be as valued by commissioners?
3. Questions about grade level enrollment targets:

- a. Can the school change the grade level enrollment target?
 - b. Should the charters have to change their grade level enrollment target?
- 4. Questions about incorporating WASC or other accreditation processes:
 - a. Can the academic performance framework align with WASC for efficiency?
 - b. Can we get more bonus points for WASC? Or build into [the] academic performance framework?
 - c. Can we consider combining the renewal process with accreditation (like WASC) in some way?
- 5. Questions regarding Mission Aligned Indicator (MAI):
 - a. What if our mission changes in 5 years? [how does that impact this indicator]
 - b. Is the MAI necessary if schools always self-rate highly?
 - c. Why does it have to change year over year when school operations equal mission?
 - d. What is the weight given to MAI versus standardized assessments?
- 6. Questions regarding indicator #2
 - a. Can we modify #2 to show progress? [student growth]
 - b. Can we lessen the 70 points for StriveHI and increase points for MAI?
- 7. Questions regarding indicator #3:
 - a. Can we compare to other similar schools as an option? For example, high SpEd school to other SpEd schools?
 - b. Can we have comparison groups? (like KAEO) instead of comparing against nearby schools that use different assessments?
 - c. To what extent are schools punished for choosing to serve underserved populations (e.g., large special education populations) when comparing against other schools in Indicator #3?
 - d. Can we compare our school to other schools with similar population makeup?
- 8. Questions about an additional (optional) measure:
 - a. Is there a process for schools to come together around some additional metrics?
 - b. Can we look at a measure for growth? [in the APF]
 - c. What about other metrics/early college, growth of students?
 - d. Could we [schools] align around the same tools? (e.g., panorama)
 - e. Where could 'ohana satisfaction (e.g. SQS survey data) be included in the APF?
 - f. Checking in with alumnae 5 years from now, is this the role of the governing board [or school]? Not easy but should we figure it out?
 - g. From the school: what was our impact? How can we use it without being mandatory in contract?
 - h. Is there an element (not in the contract currently) that schools can opt into (e.g., portfolio)?

Organizational Performance Framework

1. Questions regarding the framework:
 - a. When would OPF-related interventions be triggered?
 - b. What's the goal of the OPF – is it specifically for charter renewal or school support?
 - c. Why are the rules the same for schools not on DOE campuses? Can we see a differentiated OPF for non-DOE campuses or alternative school models?
2. Questions regarding priority and weighting of tasks to complete
 - a. Can the schools have a list from the Commission [about what are the priority items]?
 - b. Can we reorganize the section [of the framework] according to differently “weighted” tasks?
 - c. Can we see a differentiated organizational performance framework for schools not on DOE campuses?
 - d. Can we accommodate for tasks that take more time to fix somehow, so we don't get dinged until it is fixed?
 - e. Should [the tasks] be weighted differently?
 - f. Is there a way to account for this [not all tasks are created equal] in the framework? Weighted? Color coded?
 - g. How many deficiencies trigger intervention, and are all weighted the same?
3. Questions regarding the informational resources for things like health & safety, HR
 - a. Can we facilitate with the DOE in any way, particularly when it comes to sharing health & safety requirements/protocols?
 - b. How can we coordinate required trainings like active shooter or bus driver training when we have to wait so long for DOE resources to be available?
 - c. Could we pool resources to help each other? Schools from east and west [Hawai'i] come together quarterly?
 - d. Can governing boards meet to build shared capacity (for HR, finance)?
 - e. Regarding HR issues with unions, do I go to my governing board, CAS or SPCSC?

Financial Performance Framework

1. Questions regarding the financial framework:
 - a. Why do some FPF indicators carry more weight than others?
 - b. Could the framework's reference to FASB be updated to GASB to reflect current standards?
 - c. Can the financial framework be differentiated between schools of different size, age, and demographics?
2. Questions regarding the use of auditors/audit process:
 - a. Can the audit be a measure for more established schools?
 - b. Can we use the audit? If the purpose [of the audit] is to assess financial risk?

- c. Is there a way to use the audit as a consideration [in the financial framework]? Seems like we are doing it again with the financial team, would be helpful not to duplicate tasks.
 - d. What is the role of the audit – too late to use as an early warning system?
3. Questions regarding financial metrics:
- a. Why do Year 1 funds have to be less than Year 2 funds, less than Year 3 funds, etc., for the cash on hand metric? Is the expectation of increasing cash on hand every year reasonable or misaligned with real-world operations?
 - b. Why do year end cash metrics penalize dipping into reserves (e.g. for emergencies)?
 - c. How do we deal with metrics designed for year-end use that misalign with daily operations?
 - d. Can the commission advocate for changes to the PPA?
 - e. What happens to budgets after they are submitted?
 - f. How can we ensure that financial measures accurately reflect each school's financial reality?
 - g. Could a narrative in lay terms be provided to help define the model?
 - h. Can we clarify how risk ratings translate to oversight actions?
 - i. Should/can start-up schools be evaluated differently, given lower reserves and higher debt-to-asset ratios in early years?
 - j. Could large grants or CIP funds be excluded from penalizing schools within the FPF?
 - k. Should/can occupancy expenses above 25% be flagged as indicators of financial vulnerability?
 - l. Would incorporating a debt service coverage ratio better reflect financial health in Hawai'i's charter school context?
 - m. Should/can the model incorporate context, such as future obligations (e.g., leases not yet active), to assess risk earlier?
 - n. Could the Commission create minimum and maximum target ranges for cash reserves to encourage effective fund use?
 - o. Does the risk assessment model provide an early enough warning system to detect financial trouble?
4. Questions regarding financial training:
- a. Will training provided to the Boards be by schools, or will training by a vendor be required?
 - b. Is there training for commissioners on school financial performance?
 - c. Could the SPCSC provide financial management training and shared service opportunities to schools?
 - d. Can there be more support for payroll and accounting systems (to schools)?

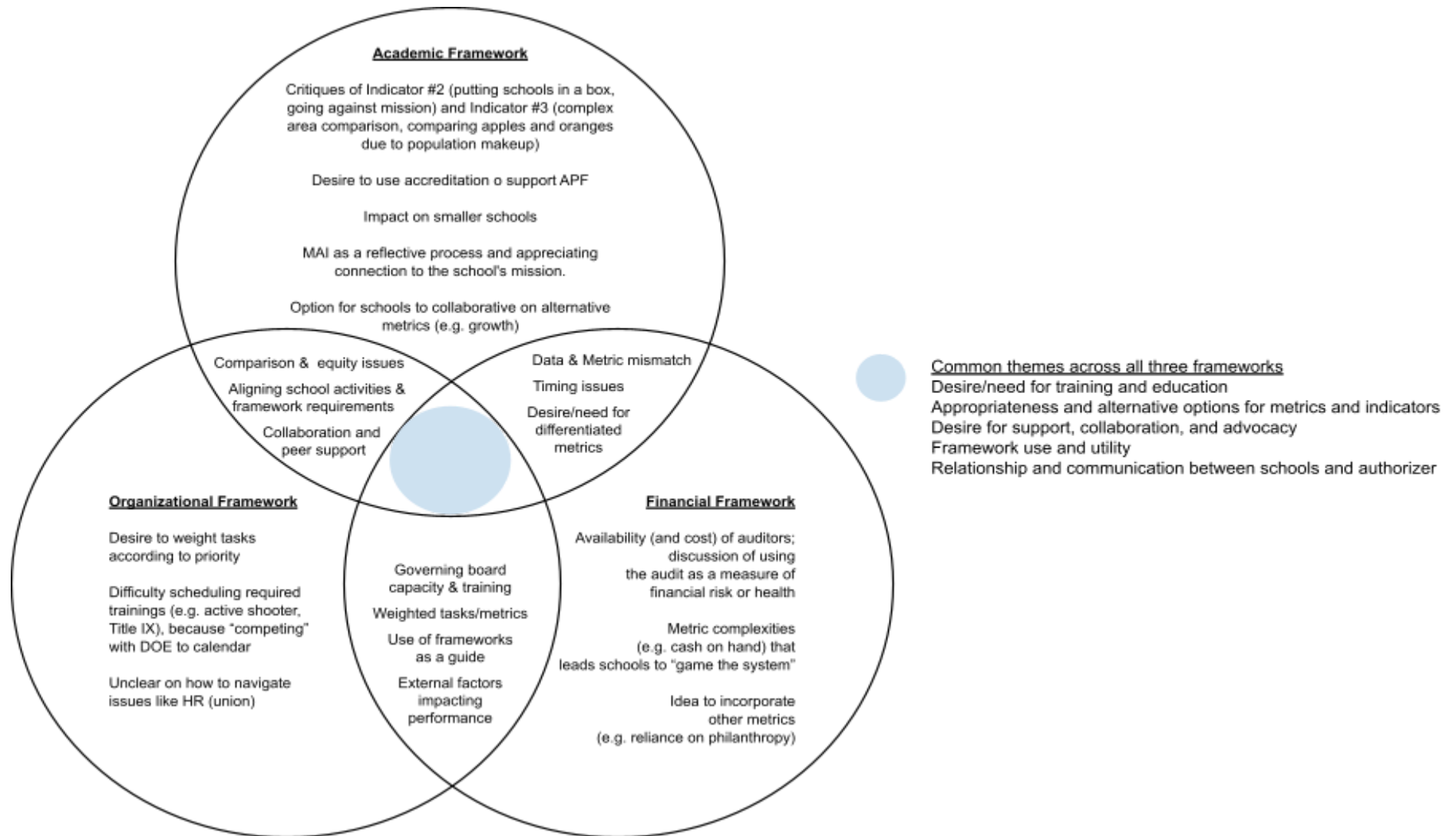
Other

1. Questions regarding renewal process:

- a. Can we get a heads up with the questions that will be asked [for renewal], what materials have to be prepared, timeline and process?
 - b. Can we think about the renewal process being done at the school site? ("the value of seeing 1st hand")
 - c. Could renewal be combined with accreditation?
 - d. Can we stagger the renewal process for smaller groups (instead of having 23 renew at the same time)?
2. Questions regarding contract, contract language, and advocacy
- Note: visually showing how 302d and contract 4.0 align with each other should be considered*
- a. Is there room for revisions [in the contract] and if so what are they?
 - b. Can we discuss the comments of the contract?
 - c. Does Contract 4.0 18.5 (termination clauses) add to the law (302.d) in ways that conflict with statute?
 - d. Regarding contract language like "shall," "may," "will," "bilateral," "negotiate," whose interpretation matters?
 - e. Can the commission advocate for the PPA (per pupil allocation)?
 - f. What would a negotiated contract look like in practice?
 - g. Can we add hyperlinks in the contract for cross-referenced sections?
 - h. What is the "Notice of Warning" (section 17.9) and is it implied to be the same as "Notification of prospect of revocation"?
 - i. Who is advocating for charter schools [with DOE/State]?
 - j. What's the due process? [for appealing decisions]
 - k. What is authorized by statute in terms of nonprofits operating charter schools?
 - l. Can we discuss contract comments openly?
 - m. How do we ensure that flagged contract issues are actually resolved?
 - n. How can we account for individuality within the contract?
3. Questions regarding previous listening sessions
- a. What about the feedback from the last time? [referring to previous listening sessions]
 - b. Have the tone, topics of listening sessions changed [over 20+ years], and if so, how (or how have they remained the same)?
 - c. Can we have more transparency with decisions?
4. Questions regarding training, building capacity, support
- a. Is there training for commissioners regarding the financial performance of schools?
 - b. Can the SPCSC staff do training (of commissioners) with turnover?
 - c. Can the staff bring schools together to learn, and also to suggest additional metrics that better reflect charters?
 - d. What other networks are happening [that we can participate in]?
 - e. Is there an opportunity for governing boards to meet to build capacity with HR and financials?

Venn Diagram

Visual representation of key discussion points, and how they are distributed across the three performance frameworks. Detailed definitions of shared themes are provided on the following page.



Academic and Organizational

- *Comparison and equity issues:* Difficulties when comparing schools that are fundamentally different, whether due to student population and assessments used (Academic) or campus type and operational structure (Organizational). This leads to the feeling of comparing "apples and oranges".
- *Aligning school activities and requirements:* Both frameworks present challenges in fitting the school's actual operations, curriculum, or activities into the framework's structure, timelines, or rules (E.g., project-based learning and its cycle of learning conflicts with mid-year enrollment timing; also scheduling required trainings is difficult due to external dependencies like "competing" with DOE schools).
- *Collaboration and peer support:* Schools express a desire to collaborate with and learn from other schools. This includes sharing academic practices and metrics or pooling resources and coordinating convenings for operational or safety training.

Academic and Financial

- *Data and metric mismatch:* In both academic and financial frameworks, schools note a discrepancy between the data and metrics required by the framework and the data or measures they use or find most useful internally. Schools use internal tests or assessments for academic purposes and different internal measures for financial health, which may not align with reporting requirements.
- *Timing issues:* There are conflicts between the framework's required timelines (e.g., testing, financial reporting periods) and the practical timelines of school operations or external processes.
- *Desire/need for differentiated metrics:* The challenge with standard metrics and its appropriateness; the desire for differentiation based on school characteristics like student population makeup or school size and age.

Organizational and Financial

- *Governing board capacity and training:* The importance of governing board expertise and training is mentioned for these frameworks, particularly with managing HR and financials and understanding the financial performance framework.
- *Weighted tasks and metrics:* Suggestions to weight tasks or metrics within both frameworks to reflect their relative importance or difficulty.
- *Framework as guide:* Both frameworks are used by schools and their governing boards as tools or guides for developing, clarifying, or monitoring internal policies and procedures.

- *External factors impacting performance:* Schools feel they are sometimes penalized in framework performance due to factors outside their direct control, such as changes in regulations (Organizational) or changes in per pupil allocation or requirements like hazard pay (Financial).

Themes Common to All Three Frameworks (Center of the Venn Diagram)

- *Desire/need for training and education:* There is a desire for more training for school staff, governing board members regarding how to understand and work with the frameworks. Schools want to calibrate against Commissioner priorities and focus areas.
- *Appropriateness of and alternative options for metrics and indicators:* A central discussion point is the relevance, equity, and appropriateness of the current metrics or indicators. Schools would like alternative measures; examples include adding growth, reducing the “weight” of StriveHI, options for comparison groups, provide space for narrative explanation to better reflect their performance and unique context.
- *Desire/need for support, collaboration, and advocacy:* Schools express a strong need for greater support from the authorizer (Commission and staff), advocacy on behalf of charter schools with external entities like the DOE or state legislature, and facilitated collaboration among schools to share best practices and navigate framework challenges.
- *Framework use and utility:* The frameworks are used by schools for various purposes, including ensuring compliance, monitoring performance, and guiding internal policies and procedures. However, there is also questioning about the overall intent and utility of the frameworks – are they purely for renewal/accountability, or are they truly tools to help schools improve?
- *Relationship and communication between the schools and the authorizer* (Commissioners and staff) are critical and cut across all three frameworks. Positive interactions (Frameworks team being helpful, trust in staff) and negative interactions (confusing communication, unexpected focus from commissioners, feeling pressured) influence how schools engage with and perceive the frameworks in all areas.

Appendix A

Transcription

Full transcription with coded themes is provided in this section. Responses from feedback sessions and open-ended responses from the online survey are included.

Academic Performance Framework

Transcribed Notes	Key Themes	Feelings
<p>"Clear as mud"</p> <p>Why does it have to change year over year when school ops = mission</p> <p>Quantify something that is qualitative</p> <p>Academic committee of (my) governing board don't know how to interact with the academic performance framework</p> <p>Point distribution rating for academic proof</p> <p>What is supposed to be in there? [there is a] lack of clarity at first - focus on something small and make changes every year; when we meet it, it sounds like we are going in the right direction ([with our] reasoning), [but] we are hoping we understood clearly <u>and</u> the response we provide is sufficient</p> <p>Indicator #4 diagnostics, school development tool... school portfolio is one data point but needs at least 1-2 (portfolio & defense for example)... I don't know what to put in the box? I'm clear when I'm with the team and when they leave I don't understand, it takes a meeting and a half to get my team to understand what we're writing about/for</p> <p>Do you want academic goals to be more specific to your school? StriveHI does not play a role for us; [our students] take test 1x/yr, if we want to test more we use APF #4 (not StriveHI). We ask ourselves "are we measuring up with other schools?" if yes, we put in a drawer and move on</p> <p>StriveHI/DOE is moving from chronic absenteeism to average daily attendance, this will change how [schools need] to engage with families, this is a good thing! ("moving from punitive to positive")</p> <p>Indicator #1A is a self-rate on mission and vision ("why wouldn't you always have 30 points?" is this necessary?) there are space constraints for us to respond; the directions don't prompt us to write the answers in the way the teams want to see it</p> <p>IDEA: can we have exemplars and rubrics or a checklist of what to include?</p> <p>IDEA: can we record zoom sessions? Get the powerpoint? (to refer to later)</p> <p>IDEA: can we have more prompts in the directions?</p> <p>Project based curriculum not conducive for mid-year enrollment. But the admissions cut off date is unclear/misaligned (9.4 contracts with 2.1) Implications are that [we] move away from the mission and it is hard to prepare for</p> <p>Can the school change the grade level enrollment target? Should the charters have to? How do we account for individual needs of schools (matters to some, others no)</p> <p>Hard when indicators "pit" charters against DOE</p> <p>Mission aligned indicator (MAI) helped when Pua came out and told me what she wanted to see; where is the rubric that will get us to 20 points?</p> <p>"For my school, our teachers voted we weren't at 20 but 15/20"</p> <p>Value added measure (VAM) were harder, "data muddy but we did it for compliance" - #3 and #4 are more concrete and we backwards mapped the indicators, did not let it dictate our school's systems</p>	<p><u>Clarity</u></p> <ul style="list-style-type: none"> Communication & feedback loops Comprehension of indicators, process, feedback, contract <p><u>Efficiency</u></p> <ul style="list-style-type: none"> Usability (of framework, kuleana portal, metrics, indicators, contract) Value, purpose & intent (of framework, metrics, indicators, kuleana portal, contract) Appreciation (for contract, engagement process, the opportunity to share feedback) <p><u>Points of Tension</u></p> <ul style="list-style-type: none"> Equity & Appropriateness of requirements Autonomy, flexibility (of framework, metrics, indicators, contract) Constraints of external dependencies <p><u>Opportunities</u></p> <ul style="list-style-type: none"> Ideas/Strategies <ul style="list-style-type: none"> Best practices Weight tasks differently Questions/issues to resolve and/or respond to 	<ul style="list-style-type: none"> Confusion Frustration Uncertainty Tension Concern Disempowerment Perceived unfairness Mistrust Desire for open communication Desire for tools & transparency Creativity Hope Appreciation Pride in mission
<p>Team visits really help with guiding school</p>		

<p>Indicator 2 timeline for the scoring, use KAEO & school level testing, how to measure progress in alignment with mission and vision, do not use StriveHI...</p> <p>Re: school level testing, we have our own writing assessments and assessments for project-based learning, we do a gallery walk 2x/year as an academic conference we can use for indicator 4 (Aha Na'auao), and we also have language tests (from OHE) - but we can't or don't use them [for the contract]</p> <p>We are doing [both] WINHEC and WASC accreditation to learn how to improve as a school</p> <p>"I work closely with other po'o kula (talk, share) re: academic performance framework"</p> <p>"Really appreciate MAI #1 and blending with indicator 4 and also mahalo the frameworks team"</p> <p>"#1 really allows us to measure what is important to us"</p> <p>[we] are using student portfolios with MAI, some teachers are using performance assessments and developing looking at cornerstone [assessments] across all grade levels</p> <p>"MAI is a reflective process and interesting, we wonder what if it changes in 5 years?"</p> <p>"Appreciate the connection of MAI to the mission of the school"</p> <p>"Evaluating the mission goes hand in hand with where [our] school is going"</p> <p>"As long as we can explain our story - what makes us different"</p> <p>"Frameworks team has really been helpful"</p> <p>Indicator #3: "can we compare to other similar schools as an option? For example, high SpEd school to other SpEd schools"</p> <p>"Is the contract an evaluation tool?" Has the commission [ever] shut a school down academically?</p> <p>"Is the contract really to help [the school] with academics? [or] is it to help the conversation with the authorizer? If the contract is not to help the school, then what is the intent?" Is [the contract] a thumbs up or down every 5 years? Is it to help our schools improve?</p> <p>"Happy to hear 1,3,4 are relevant indicators, indicator 2 is in state statute"</p> <p>"We struggle with #2, it puts us in a box we are trying to escape from"</p> <p>"We are accountable to state standards AND it goes against why we exist in the first place"</p> <p>"Can we modify #2 to show progress?"</p> <p>Unclear of the relevance of #2... it is like apples and oranges and not sure if it is a carrot or a stick... the challenge is achievement gap [for us], we have 30% special education population [and will always be dinged]</p> <p>Checking in with alumnae 5 years from now, is this a role of the governing board? Not easy but should we figure it out?</p> <p>From school: what was our impact? Want to know but hesitate to have this be a part of the contract</p> <p>How can we use that to improve without being mandatory in contract?</p>		
<p>It is to ensure state and federal compliance.</p>		

The weight of the standardized testing scores are still so much heavier than the unique mission targets of our curriculum model that the federal criteria still tilts the scale on whether or not the academic framework truly represents our school's mission and vision comprehensively.

I would like to see specific measurable guidelines and expectations of Charter Schools regarding state standards, instructional hours, use of progress monitoring, and other performance measures. I would love a simple to use Charter Commission developed system for measuring school success where schools input data which is then measured against the expectations to determine school success. It would be great if it was not only focused on SBAC scores but other metrics and schools were given templates for these metrics.

Determining what we will report on for APF 1 has been transformation for our school. APF 1 has helped us reframe our assessments and data in a way that focuses on what we value. This data process has allowed us to more effectively work with the teachers and staff in preparing student learning that helps us all evaluate our efforts more clearly.

I don't know what you mean by "monitoring and intervention" and "performance expectation, renewal" (in terms of how to answer this question).

The APF indicators are great in concept, but actually completing these reports each year is difficult and confusing.

In the contract, it gives the range of scoring, but it is blank - I have come in mid way thru contract, I do not know where we are currently scoring or where we were scoring when we started this contract.

It is impossible to meet the different academic components of 39 different schools with 39 various missions and visions and student profile.

The Academic Performance Framework (APF) provides a structured approach to evaluating our success, but improvements could be made by incorporating more qualitative data, such as student and teacher feedback, to complement standardized assessment results.

Love the process and feel that this contract expertly guides our school forward.

I really appreciate APF Indicator 1 as it provides us the opportunity to "tell our story" based on what we value and is in alignment with our mission. As a first attempt in using this indicator, we have had many great conversations with leadership and faculty about what this looks like and has been the basis for our work moving forward.

Unclear as to what is being asked regarding "Performance, Expectation, and Renewal".

I appreciate it and like it as is, though I know your team will continue to evolve this process to meet our (charter leaders) needs

Mission driven data is key in understanding our school, but WASC accreditation is very thorough and should suffice for contract.

Without the ability to negotiate, this represents a one-sided (Commission only) approach to accessing the academic performance of the schools.

Going through this first year of Contract 4.0 and the APF, I did not see anything that stood out to be offensive or chafing in our school's participation in this. I greatly appreciated the in-person and virtual support that the Frameworks team gave, and hope that these types of performance ratings can help our school to refine our own mission-based goals in the future. Performance frameworks that assist the schools in becoming better are good for all.

<p>The framework team has been instrumental in our development and improvement of our education</p> <p>The current Academic Performance Framework creates significant tension with our school's educational mission. While our charter emphasizes "student-centered" education, developing the "whole child" and "joyful learners...engaged in a democratic society," the framework allocates 70% of required points to standardized test performance and only 30% to mission-aligned initiatives.</p> <p>I feel that this heavy emphasis on high stakes testing contradicts the original purpose of charter schools as incubators of innovation and places undue stress on administrators and teachers. The framework prioritizes high-stakes testing over the innovative, student-centered approaches that distinguish charter schools, which doesn't truly reflect the successes of our diverse and often underserved student population.</p> <p>Additionally, the Mission Aligned Initiative indicators (1A and 1B) lack clear guidance. Terms like "Basic," "Practiced," and "Ingrained" are inadequately defined, with minimal direction on what constitutes sufficient evidence. This creates confusion about how to properly document and demonstrate our mission-oriented successes.</p> <p>I would love to see a more balanced accountability approach that honors the innovative spirit of charter schools while still ensuring meaningful assessment of student learning and growth aligned to what we value.</p> <p>The expectations of the MAI are not really clear. Also the diagnostic states three times a year, but not everyone does it three times as SBAC is at the end of the year. We had to modify the report to fit the actual diagnostic tools used.</p> <p>The performance report that was provided in October had little information regarding how the difference performance reports were broken down.</p> <p>When we compare our middle schools, to the others in the complex, Kohala Middle, Pauilo, Honoka'a inter, the class sizes are not of equal proportion. Kohala Middle is the closest. We are a unique community surrounded by private schools.</p> <p>Generally positive experiences with frameworks team. They seem to present a subjective, qualitative measure of school performance in a very fair way. I do not believe smarter balanced is a good indicator of academic achievement and the fact that we have no standardized assessment for grades K, 1, 2, 9, 10, and 12 is a huge deficiency. I am willing to concede smarter balanced is better than nothing and at least facilitates comparisons with DOE. One question (not sure the answer here so it's more a wonder): does looking at proficiency levels punish schools that serve higher grade levels? proficiency levels in HI decline as students age, so schools that have (only) older students may appear to be doing worse than elementary-only peers when in fact they are beating state proficiency levels. Can a statistical adjustment be applied to account for this?</p> <p>I still do not understand the stipulation we are under concerning closing the gap between special education and general education students.</p> <p>It is comprehensive and allows us to tell our story.</p> <p>While important, standardized testing does not fully capture the true impact charter schools have on student learning and well-being. Student safety, family supports, relationships, inclusion, and innovations are some of the other important offerings of charters.</p>		
<p>Section 6.21d. seems vague to me, as stated in my first comments.</p>		

What defines progress/consistent improvement? What if there is progress but they are still consistently falling below?

It is comprehensive but needs some work to reflect a more focused image of public charter schools in Hawaii

The current Academic Performance Framework provides a foundation for accountability while respecting charter school autonomy, but requires significant enhancements to effectively drive student achievement and program improvement.

First, while the framework attempts to balance standardized metrics with mission-aligned measures, there are fundamental concerns with its implementation. The Mission Aligned Initiative component is problematic - with 1A (worth 20 points) relying entirely on self-reported data and 1B (worth 10 points) requiring a narrative submission without standardized rubrics or objective evaluation criteria. Together, these subjective elements account for 30 points of the framework. This approach lacks the rigor and consistency needed for meaningful accountability. Clear, transparent rubrics for evaluating both self-assessments and narrative submissions would significantly improve these components' validity.

Second, the framework's point structure undermines its effectiveness as an improvement tool. The current system allows schools to score above 100 points through supplemental indicators, creating a misleading impression of academic excellence even when core performance may be average. This inflation masks areas needing improvement and creates a false ceiling effect. A more effective approach would maintain the 100-point scale as a standard of basic proficiency, with supplemental points clearly differentiated as enhancement areas rather than allowing them to obscure fundamental performance issues.

Third, the comparative analysis component presents equity challenges. Schools in different geographic locations face substantially different comparison groups, potentially disadvantaging schools in high-performing areas where operational costs (like facility expenses) may divert resources from academic programs. A more equitable approach would incorporate contextual factors into comparisons and allow schools to be measured against comparable institutions facing similar operational and demographic challenges rather than purely geographic comparisons.

Fourth, the diagnostic component offers flexibility but lacks structured guidance for translating assessment data into instructional improvements. Schools would benefit from specific protocols and resources for connecting assessment findings to classroom interventions, particularly for struggling student populations. This connection between data and practice remains underdeveloped in the current framework.

Fifth, the intervention system lacks differentiation based on school needs. Developing a tiered support framework with tailored resources at each performance level would strengthen schools' ability to respond effectively to identified challenges. Additionally, expanding non-academic indicators to include teacher retention, community engagement, and post-graduation outcomes would provide a more holistic view of school success.

Ultimately, the framework would be strengthened by shifting emphasis toward growth trajectories rather than inflated point totals, better recognizing schools making significant progress with challenging populations while maintaining clear visibility of areas needing improvement. This growth mindset approach, combined with more objective evaluation tools and contextually appropriate comparisons, would create a system that maintains accountability while addressing the unique challenges and innovations central to the charter school mission.

Using the characteristics of high-quality charter schools and characteristics of innovation, how is that being applied to the APF? If innovation is done well, students will progress in their learning. How are schools innovatively supporting their struggling students? How are they capturing this progress? How can we honor the successes of our charter schools that result in academic success in their own way versus via standardized assessments? How are we measure thinking and deepened understanding of student learning? How do we measure innovation of how students learn being more process oriented versus a single correct answer? Could there be more than one way of achieving student success? If so, how do report this to our stakeholders? How do we support schools in telling their story of student success and learning? How do we sustain this work over time to ensure that these become ingrained practices of our schools and us-the commission staff?

And, finally, what is a school fails to do any of the above? Do we and the commissioners have the guts to shut them down?

While I do believe is that the characteristics of HQ and innovation should be revisited annually which is based upon new/updated evidence (research) and data instead of personal pre- or misconceptions. I do feel what we have is a good foundation to build upon that is based on a strong research-based framework.

The MAI was created to allow schools to tell their story. Schools are slowly but surely starting to see the potential in the MAI and themselves truly.

I see that there is reference to BOE Policies in here, how do we ensure that the schools keep up on these BOE Policies?

Monitoring of the academic framework should be done related to an overall oversight framework for the whole contract. This framework would dictate how the contract is monitored and what measures or interventions the commission would take when it is determined a school is out of compliance.

I believe that the school's mission is important in offering a comprehensive picture of why a school exists and what it aims to achieve. for Indicators 2 through 4, I rated them as "somewhat" because while each provides a meaningful snapshot of student learning, they only capture pieces of a larger whole. I believe all of these indicators should be required to truly reflect a well-rounded, comprehensive academic profile of the school.

Regarding monitoring and intervention, I don't have direct experience, so I don't feel equipped to offer a strong opinion. However, from what I've seen in the contract, the expectations for performance and renewal are stated clearly, though not with enough detail for someone to fully understand the process without having gone through it themselves.

One thing I noticed is that during the application process, applicants are expected to describe their instructional models, assessments, and learning outcomes, but these elements are not explicitly reflected or evaluated in the Academic Performance Framework.

Applicants are also required to submit detailed plans for serving English Learners, students with disabilities, and other vulnerable populations with plans for staffing, curriculum adjustments, and progress monitoring, but the contract only includes general compliance requirements under federal and state law. It does not specify performance targets or require disaggregated reporting for these subgroups, which limits visibility into how well these students are being served.

Indicator 2 carries too much weight and forces some schools to game the APF. Originally the four indicators were meant to be weighted equally and were intended to tell the full story of each individual school. Schools should have had the ability to choose the comparative group (Indicator 3) that should

<p>have included like populations, immersion/non-immersion, location with regard to remoteness, etc. Indicator 4 provides an opportunity for schools to develop their own site created and validated measures to tell their story beyond the "artificial scores" that are reported in Indicator 2.</p> <p>I really appreciate how the Academic Performance Framework brings together multiple academic criteria. It's thoughtfully designed and strikes a good balance between accountability and flexibility. I especially value the mission-aligned initiative. It gives schools a meaningful way to share how they're living out their unique missions, which isn't something we often see in traditional accountability systems.</p> <p>StriveHI is important for providing a comparison to other public schools and I understand why it's included. But I don't think it tells the full story of what's happening at our charter schools. The diagnostic measure is a strong addition because it gives schools the ability to choose how they demonstrate their progress.</p> <p>I think there's still some confusion about how the point system works and whether it truly reflects the whole picture of a school's performance. Removing the points might actually help reduce that confusion and allow commissioners to make decisions based more on the full context and uniqueness of each school.</p>		
<p>Additional clarity needed regarding reporting and analysis of each Indicator -need to reflect on and analyze whether scores/points are providing sufficient info on academic performance; provide a compilation of data from schools opting in on indicators 3 & 4; when would or do schools receive intervention for academic performance during contract?</p> <p>APF provides a strong foundation and hold schools to a high expectation with sufficient space to be innovative. no additional comments</p> <p>Schools need to be bolder in their choice of mission aligned; contract also needs to take harder look at the underlying math as its basically impossible to nonrenew a school for academic performance alone.</p>		

Organizational Performance Framework

Transcribed Notes	Key Themes	Feelings
<p>Kuleana portal - emails are not user friendly</p> <p>It is a snapshot of performance that works toward contract renewal</p> <p>"It's ok for things to be complicated. Schools are not simple"</p> <p>100% tasks complete for renewal</p> <p>Background check for volunteers - restrictiveness of language makes it seem like a "gotcha" instead of supportive and safe. This impacts our mentorship program (we have a very large program) as it limits the engagement of our community</p> <p>Active shooter training, bus driver training - these resources are taken up (in scheduling) by DOE, how can we schedule these when we have to wait for DOE? IDEA: could we pool resources to help each other? Schools from east and west [Hawai'i] come together quarterly? "What other networks are happening [that we can participate in]?" need a person to coordinate convenings. Charters can talk to each other to share resources, can we facilitate with DOE in any way, particularly when it comes to sharing health & safety requirements/protocols?</p> <p>Annual regulations [can change, there are a lot of them] but do not have a lot of support - this can impact contract performance. IDEA: can we have a shared resource for the "big" trainings - title IX, active shooter, suicide prevention, BOY teaching trainings</p> <p>Can we reorganize the section according to differently "weighted" tasks?</p> <p>"Can we see a differentiated organizational performance framework for schools not on DOE campuses?"</p> <p>Facilities requirements are not equitable... conversion charters are different from startup [charters]</p> <p>"Why are the rules the same when I am not on a DOE campus?"</p> <p>Should [the tasks] be weighted differently? Challenge is in the nuance of the criteria</p> <p>Max enrollment and mission need commission approval, [and] tied to financial performance... if I overproject I get dinged for it, so we underproject... facility [of our campus] should dictate [max enrollment], not a letter</p> <p>"There are 3 big challenges [we deal with], #1 [getting kids] to/from school, #2 meals, and #3 a roof (facility). 3 biggest challenges and we should not have to follow if not getting funds from the DOE"</p> <p>"Is there an opportunity for governing boards to meet to build capacity with HR and financials?"</p> <p>"Not all tasks are created equal" Is there a way to account for this in the framework? Weighted? Color coded? Can the schools have a list from the Commission [about what are the priority items]?</p> <p>We like the kuleana portal</p> <p>"What's the goal [for the organizational performance framework]?" Is it [just] for charter renewal? Or to provide a way to identify schools who need help?</p> <p>There are some short fixes, but some take more time. We are still working on it but we get dinged on it until it is fixed. Can we accommodate for this somehow?</p>	<p><u>Clarity</u></p> <ul style="list-style-type: none"> Communication & feedback loops Comprehension of indicators, process, feedback, contract <p><u>Efficiency</u></p> <ul style="list-style-type: none"> Usability (of framework, kuleana portal, metrics, indicators, contract) Value, purpose & intent (of framework, metrics, indicators, kuleana portal, contract) Appreciation (for contract, engagement process, the opportunity to share feedback) <p><u>Points of Tension</u></p> <ul style="list-style-type: none"> Equity & Appropriateness of requirements Autonomy, flexibility (of framework, metrics, indicators, contract) Constraints of external dependencies <p><u>Opportunities</u></p> <ul style="list-style-type: none"> Ideas/Strategies <ul style="list-style-type: none"> Best practices Weight tasks differently Questions/issues to resolve and/or respond to 	<ul style="list-style-type: none"> Confusion Frustration Uncertainty Tension Concern Disempowerment Perceived unfairness Mistrust Desire for open communication Desire for tools & transparency Creativity Hope Appreciation Pride in mission
<p>It is a long process to go through for change of address - also dependent on timing (of when</p>		

<p>commissioners meet), it can take a long time - state does not match addresses then it is a compliance issue. Might be better to do this based on Cert of Occupancy</p> <p>Approval process for facilities in an emergency</p> <p>HR - the organizational performance framework doesn't really address compliance pieces re: union HR... schools trying to figure it out can use education (on this) because they just don't know</p> <p>IDEA: can we help each other as schools (with HR, safety, financials)?</p> <p>Pretty simple and straightforward</p> <p>Some overlap with HSTA, HGEA – unclear about process [with union issues], do I go to Governing board, CAS or SPCSC? HR issues sometimes requires going to CAS</p> <p>Po'o kula have network to reach out to to find answers, "I keep calling until I figure it out" mentality</p> <p>"There is nothing in the contract that inhibits me from adding a classroom (it takes forever to add a classroom)"... the timeline is not the contract but working with KCC</p> <p>"Mahalo for monitoring website - discovered some errors (frameworks team noticed) we did not know about"</p> <p>Kuleana portal - google classroom but did not know it was in there - required [me] to check off in google classroom, which I did, but it will show up late to be checked off</p> <p>Makes it difficult to complete sometimes when it comes to reports - sometimes it comes without much consideration with what is happening as school level</p>		
<p>I am familiar but not enough to answer at this time.</p> <p>I don't know what you mean by "monitoring and intervention" and "performance expectation, renewal" (in terms of how to answer this question).</p> <p>As a new school, I will feel more prepared to answer these questions once we begin to engage with the frameworks committee.</p> <p>The worksheets in the exhibit are TINY. Maybe consider bigger formatting.</p> <p>Same answer as the Financial Frameworks and Academic. It needs differentiation between the different schools.</p> <p>This area helps give a clear idea of our current profile which is extremely valuable as we grow plus evolve.</p> <p>No comments. Good from my seat</p> <p>Without the ability to negotiate, this represents a one-sided (Commission only) approach to accessing the organizational performance of the schools.</p> <p>The team has been extremely helpful in helping us through the requirements</p> <p>I wish there was more training for school leaders and business managers, specifically around HR.</p> <p>There really isn't an explanation of how the organizational chart is used other than listing "met" or "does not meet." Also the organizational framework has reference to the academic and financial frameworks, so it can be double jeopardy</p> <p>Organizational frameworks is unclear - how many deficiencies is problematic? If some are more important than others, which ones are most important? Are we really treating a broken link on a website</p>		

<p>the same as ongoing/repeated deficiencies on items that present major risks to students? Seems like this framework needs to be more nuanced, schools will do whatever they need to in order to comply but need to be given the rules of the game. However, having said all this, we appreciate frameworks' assistance in helping us remain compliant.</p> <p>Need more clarification on insurance carriers in terms of what entities carry certain liabilities in the event of accidents/incidents that result in needing coverage</p> <p>Good.</p> <p>The additional requirements, expectations, and burdens placed on conversion schools are not considered in the school's overall performance, such as the requirement to accept all district students even though it may not be their school of choice.</p>		
<p>I would not use the word profile. This framework provides an answer to whether a school is compliant all of the time or part of the time. It is necessary, however in my opinion it does not provide an in depth look into the quality of the school.</p> <p>The current Organizational Performance Framework provides a structured approach to charter school oversight through its comprehensive set of compliance indicators, but could benefit from several enhancements to better support school development and innovation.</p> <p>The framework's principal strength lies in its detailed coverage of essential operational areas - from governance and financial management to health and safety requirements. The binary evaluation system ("Meets" or "Does Not Meet") offers clarity regarding compliance expectations. However, this approach may inadvertently overemphasize compliance at the expense of continuous improvement and innovation.</p> <p>A more balanced framework could incorporate graduated performance levels beyond simple compliance. For example, implementing a tiered evaluation scale (Exemplary, Proficient, Developing, Concerning) would recognize schools that exceed minimum requirements and establish best practices that could benefit the broader charter community. This would transform the framework from primarily a compliance tool to one that also celebrates and promotes operational excellence.</p> <p>The current intervention approach is primarily reactive, with corrective action plans triggered only after non-compliance. Incorporating proactive support mechanisms - such as operational capacity assessments, governance training resources, and process improvement tools - would help schools build systems that prevent compliance issues before they occur.</p> <p>Additionally, the framework could better acknowledge the developmental trajectory of charter schools. New schools face different operational challenges than established ones, yet the evaluation criteria apply uniformly regardless of a school's maturity. Creating differentiated expectations based on school age would provide appropriate scaffolding for developing schools while maintaining high standards for more established institutions.</p> <p>Finally, the annual assessment process could be enhanced by incorporating more peer-driven evaluation components. Creating opportunities for schools to learn from each other's operational practices would foster a collaborative improvement culture within the charter community rather than positioning the Commission solely as an enforcement entity.</p>		

<p>These adjustments would maintain the framework's strong accountability foundation while better equipping charter schools with the support needed to develop robust operational systems that ultimately improve educational outcomes for Hawaii's students.</p> <p>Strong school leadership includes having strong organizational strength to succeed. If their MAI is comprehensive and taken to heart by all members - all faculty, support staff, students, 'ohana, board, and community partners, all members will see to it that its organization is solid as well.</p> <p>Our Commission office is stuck in a rock and a hard place with organizational performance. I am operating under the belief that we are not an investigatory arm of the Commission, we merely report out</p> <p>There are many redundancies in the org framework. This framework absolutely needs revision. Along with the other two frameworks, schools should know specifically the actions that will be taken if found out of compliance.</p> <p>The Organizational Performance Framework is incredibly comprehensive which shows how seriously we take school accountability. But because it covers so much, it can feel overwhelming and hard to break down into clear, actionable expectations.</p> <p>We need to be more explicit about which OPF breaches are serious enough to lead to intervention or even nonrenewal. For example, not posting board meeting minutes on a school's website is not as serious as failing a fire inspection (which directly impacts student and staff safety). It might be helpful to review which sections of the OPF are marked as "annual" versus "renewal" in Exhibit A to make sure the stakes and expectations are communicated clearly and consistently.</p> <p>It is important that both schools and our staff clearly understand the level of risk tied to each area of OPF performance. That way, expectations are applied consistently and schools can better focus their efforts.</p>		
<p>when would intervention protocols be used for organizational performance during contract?</p> <p>certain policies do not need to be approved by the commission in my opinion and should be left to staff</p>		

Financial Performance Framework

Transcribed Notes	Key Themes	Feelings
<p>Budget variance = actual revenues/projected revenues</p> <p>Haven't experienced issues, feedback loop pretty responsive</p> <p>Explaining financial metrics to new board members can be challenging</p> <p>Cash on hand metric: (year end) LESS (year beginning) = positive. Why do year 1 funds have to be less than year 2 funds, less than year 3 funds etc? We game the system to end up with more funds at end of year, potentially impacts spending</p> <p>When you dip into reserves (e.g. disaster pre planning) you are dinged, feel it more with smaller schools</p> <p>Restriction of auditors (allowed only 4, 1 on HI island) - overwhelmed and overpriced, want to have more of an array to be available to charters, language renewal [in the contract] as to the number that can be available</p> <p>Utility of the metrics (by board and school) beyond the requirement to present</p> <p>Different measures used by school for financial health than what is required [to be reported]</p> <p>Measures are complicated to explain and hard to understand</p> <p>Total margin based on time receiving funds (e.g. OHA)</p> <p>Variance based on enrollment</p> <p>"Can the audit be a measure for more established schools?"</p> <p>"Can we use the audit? If the purpose [of the audit] is to assess financial risk?"</p> <p>Metrics are designed for the end of the year - this timing does not work for school's daily operations</p> <p>Financial framework does not account for substantial change in per pupil allocation (PPA) - "schools would be dinged for something we have no control over" "Can the commission advocate for the PPA?"</p> <p>"Is there training for commissioners regarding the financial performance of schools?" Can the SPCSC staff do training (of commissioners) with turnover? Process to communicate is through testimony (difficult to share in 2 min)</p> <p>Things distal to school's control can impact performance here. E.g. hazard pay - no clarity over what to do if we have to pay for hazard pay with PPA and then we get dinged or we use reserves and get dinged again</p> <p>"Who is advocating for charter schools [with DOE/state]?"</p> <p>Financial metrics can be looked at differently based on size and age of schools</p> <p>"[we use] 3 buckets: occupancy (less than 20%), operations (⅔) and everything else"</p> <p>Audit process is sound... [but] does it set up alarm bells too late?</p> <p>Financial performance framework is built off a narrative that "[charters] cannot handle finances"... seems like challenges are emerging with schools that have NPOs (this notion is not universal), what is authorized by statute (in terms of NPOs)?</p> <p>Policy makers are looking at relationship between performance and budget</p>	<p><u>Clarity</u></p> <ul style="list-style-type: none"> Communication & feedback loops Comprehension of indicators, process, feedback, contract <p><u>Efficiency</u></p> <ul style="list-style-type: none"> Usability (of framework, kuleana portal, metrics, indicators, contract) Value, purpose & intent (of framework, metrics, indicators, kuleana portal, contract) Appreciation (for contract, engagement process, the opportunity to share feedback) <p><u>Points of Tension</u></p> <ul style="list-style-type: none"> Equity & Appropriateness of requirements Autonomy, flexibility (of framework, metrics, indicators, contract) Constraints of external dependencies <p><u>Opportunities</u></p> <ul style="list-style-type: none"> Ideas/Strategies <ul style="list-style-type: none"> Best practices Weight tasks differently Questions/issues to resolve and/or respond to 	<ul style="list-style-type: none"> Confusion Frustration Uncertainty Tension Concern Disempowerment Perceived unfairness Mistrust Desire for open communication Desire for tools & transparency Creativity Hope Appreciation Pride in mission

<p>School leadership capacity to build financial performance is the key [here]</p> <p>"Does [the financial performance framework] allow charter school commission staff to be more proactive and see warning signs?"</p> <p>Schools are looking for something [to reflect] more dynamic/mid-year changes</p> <p>Context matters - if we move up on risk for doing something, this may make leaders less inclined to do other things (the school may need to be considering)</p> <p>"[we] like the cash flow + cash on hand = 45% of framework, this is a measure of reliability"</p> <p>"Per NACSA guidance debt/asset ratio needs to be updated"</p> <p>"Perhaps we should consider incorporating other metrics? E.g. source of funds - over reliance on philanthropy as a source of risk"</p> <p>[we] work well with auditors</p> <p>Governing board updated policies to mitigate risk in use of funds [based on financial performance framework]...Any large amount of funds is a governing board discussion "Systems we have in place now align with the contract"</p> <p>[we] have regular meetings to discuss [financial performance framework]</p> <p>Governing board treasurer is akamai with finances</p> <p>"I am fortunate to have governing board members that are familiar with these elements... I worry about the sustainability of the governing board [to always have this expertise]"</p> <p>"It's hard for new folks to understand the process/policy if they don't know the why"</p> <p>"I want more training on [the financial performance framework]"</p> <p>"Hardest thing for me to do is to spend money"</p> <p>"We use [the financial performance framework] as a roadmap and platform for courageous conversations (internally)" - "The framework will be helpful as we plan our path ahead, the performance framework helped save our school!" We had to look at risk assessment – and led to changes in policies and procedures</p> <p>IDEA: incorporate metrics into school systems</p> <p>"Is there a way to use the audit as a consideration? Seems like we are doing it again with the financial team, would be helpful not to duplicate tasks"</p> <p>Timeline - financial team comes in the summer a year later, which means we have to put it all together all over again (want the site visit closer to the audit)</p> <p>IDEA: keep an audit box so materials are readily available when the financial team comes</p> <p>Auditors have tight timelines and may contribute to late submittals</p> <p>PPA - wait until May for legislature to put budget together, timeline not ideal with contract 4.0</p>		
<p>I do not know enough to respond at this time.</p> <p>These may not specifically apply to the financial performance framework of the contract however they are financial concerns that I see in the charter school system. I would like to advocate that current per pupil funding is not required to be paid to the commission due to historic NOC's especially if many</p>		

years old. This negatively impacts our current students and financial performance as well as programs that we are able to provide to our keiki. I also suggest that there is a 100 day student count and funds are adjusted to represent real numbers. Additionally, I think there needs to either be financial supports for facilities or a difference in calculation for per pupil funding for conversion charters, online schools and brick and mortar locations in order for our students to have equitable access to education and programs. There is a disparity not being addressed between these three types of charter schools. It would be great if there was start up funding available for charter schools to support rural areas in need. the expectation of cash on hand increasing each year is weird.

Some concerns about the Risk Assessment Measures.

I think they are fine, and thankfully I think our school regularly looks at them and is meeting them.

This should be differentiated between each school. It is impossible to review each school because of different demographics and especially school size and budget.

This area is of GREAT importance as data shows that financials are a overwhelming reason for charter school closure.

I'll defer to Gabi (CEO) and Todd (board chair) to an extend on this input b/c they deal with the day to day of this Framework. But I think it works for us. I wonder about how the framework can stretch/push us to think about long-term projections with an eye on school sustainability (in other words, how do we all get better at "forecasting" and "projecting").

Some models are inherently skewed and need to be correct — especially when large grants or CIP funds are received and it ends up penalizing schools within this framework. The audit should suffice for contract financial framework.

Without the ability to negotiate, this represents a one-sided (Commission only) approach to accessing the financial performance of the schools.

I am not on our board's Finance Committee so my thoughts are limited regarding the FPF but our monthly Finance reports were modified to reflect our compliance within this measure of Contract 4.0.

I wish there were more training and support for efficient and effective systems, specifically in regards to payroll and accounting.

I am not sure what happens to budgets after they are submitted, but the few I have seen from other schools do not seem to be grounded in reality. (However, there is merit in making schools go through the exercise regardless.) Risk assessment model has a lot of validity but also some pukas. One of the biggest challenges that you won't be able to easily solve is that quarterly reporting isn't super helpful - there's so much money sloshing around during the year that all interim financial ratios are nearly meaningless. As I see it, the low-hanging fruit and where you could get the most impact for little extra work would simply be to have schools calculate (or calculate yourselves) what percentage of their school's budget is occupancy, what % is payroll, and what % is other. Occupancy going too far above 20% or 25% for a sustained period of time will tell you who is on thin ice financially. You could also have schools calculate a Debt Service Coverage Ratio which in Hawaii where schools don't have debt is effectively a lease coverage ratio (funds available to pay lease expenses divided by lease expenses). One other big shortcoming that you should try to solve for is even though it's allowed under US GAAP accounting is future obligations - let's say I am a school that is dreaming of having a nice new facility and it requires me to take out a gigantic lease that I cannot afford which does not start for a couple of years, that's a huge financial burden and legal obligation, but it doesn't show up in my financials until the audit the year *after* the lease starts, at which point it's too late. One last item on the financial

<p>frameworks: Hawaii's Debt to Asset ratio is outdated - see updated NACSA guidance. The last thing I will add is that it is not clear to me the extent to which the Commission views its role as preventing schools from failing financially, or whether it is laissez faire about that ("free market") and instead sees its kuleana as protecting Hawaii taxpayers and/or students from the fallout of schools that do.</p> <p>Still formulating my perception of the financial performance framework</p> <p>Our financial team is highly intelligent and capable, I am very confident in our financial management, oversight, and processes.</p> <p>Very detailed. Helpful for us to ensure fiscal management fidelity.</p> <p>Financial health has well-accepted standards.</p>		
<p>I think this model is sound, but does not go far enough to gain clear insight into the financial stability and long term sustainability for Hawaii public charter schools. Not sure of it is a strong enough early warning system.</p> <p>The current Financial Performance Framework provides a robust risk-based approach to financial oversight, but could benefit from several strategic enhancements to better support charter schools' financial health and operational sustainability.</p> <p>The framework's strength lies in its comprehensive assessment methodology that evaluates both near-term indicators (Current Ratio, Unrestricted Days Cash) and long-term sustainability measures (Debt to Asset Ratio, Cash Flow, Total Margin). The weighted formula approach (with appropriate emphasis on Days Cash at 35% and Total Margin at 25%) reflects industry best practices from NACSA standards and creates a balanced perspective on financial health.</p> <p>However, the framework could be strengthened in several key areas:</p> <p>First, while the risk assessment model effectively identifies financial challenges, it could incorporate more proactive support mechanisms. The current intervention approach primarily triggers after problems are identified rather than helping schools build financial strength proactively. Developing tiered intervention protocols with specific resources at each risk level would transform this into a more supportive tool.</p> <p>Second, the Budget Variance indicator (10% of assessment) focuses solely on revenue variance, but expenditure management is equally critical to financial health. Expanding this to include expense variance analysis would provide a more complete picture of a school's budgetary discipline.</p> <p>Third, the framework's thresholds for Unrestricted Days Cash (35% of assessment weighting) may need recalibration. While having sufficient cash reserves is important, the current data showing an average of 600 days cash on hand suggests schools may be overcautious and potentially hoarding resources rather than deploying them effectively for educational purposes. The framework could benefit from establishing both minimum and maximum target ranges for cash reserves that better balance financial prudence with program investment. A more balanced approach would encourage schools to maintain reasonable reserves while ensuring that public education funds are being used to directly support current student needs rather than accumulating unnecessarily large cash positions. This would align financial management more closely with the mission-driven nature of educational institutions.</p> <p>Fourth, while the framework includes compliance monitoring for financial management policies, it could provide more concrete guidance and resources for schools to develop robust financial controls, particularly for newer or smaller schools with limited administrative capacity.</p>		

Finally, incorporating a financial capacity-building component would transform the framework from purely evaluative to developmental. Providing resources for financial management training, shared service opportunities, and peer learning networks would help schools build the financial infrastructure needed for long-term success.

These enhancements would maintain the framework's strong accountability foundation while better equipping charter schools with the tools and support needed to achieve financial sustainability in Hawaii's unique educational landscape.

I have yet to see a school who fails financially yet succeeds in the learning success of their students. Good leadership is able to do both - have a strong financial sense while maximizing its funds to promote student success in learning.

I hear feedback from schools about how there are some measures that aren't always a good measure because of x,y and z. Just want to make sure that whatever measures we choose captures our school's financials accurately.

Will we be providing training to the Boards for this or will be requiring training by a vendor for these boards to attend?

The financial framework is great need of revision. Especially in the monitoring of the framework and the risk assessment. The risk assessment does not adequately measure the financial risk of the school. Furthermore it does not indicate a schools short or long term financial viability. An example of this is Kamalani who earned an acceptable rating while failing financially. The risk assessment should go away and commission staff should help commissioners understand each metric individually and collectively. Like the academic framework, this needs to be monitored according to a framework that clearly details what and how interventions will take place to ensure a school is compliant.

One area where the current financial framework could be strengthened is the lack of budget-to-actual variance reporting. Currently, schools submit an annual budget, but there's no formal requirement to track and report actual performance against budgeted projections. Variances often reflect deeper operational or programmatic issues (e.g., enrollment shortfalls, staffing changes), providing context for operational decision-making.

The current framework also applies the same financial indicators across all schools, which does not paint an accurate picture for start-up charter schools. New school will likely be lower days cash on hand and higher debt to asset ratio due to up front costs to start up and lower enrollment.

It also seems like the financial performance is being evaluated in isolation, but budget decisions directly impact staffing levels, student supports, curriculum, and program implementation. It would be amazing if the dashboard would crosswalk the financial indicators with academic and operational indicators so that trends could be seen and tell a story.

The Financial Framework is just one of many pieces that determine the profile of each school. I do not believe the measures are appropriate for some of the small schools who are doing good work in spite of constant financial challenges.

The Financial Performance Framework is central to charter school oversight, especially since financial mismanagement is the top reason for closures. Its risk-based approach is a strength, but the model could be reviewed to ensure it aligns school finances.

One concern is that annual audits only cover federal funds. While I understand there's no standardized method for auditing state funds, finding a way to include state funds would give us a fuller picture of

schools' financial health. In the FPF, we could also clarify how risk ratings translate to oversight actions and explain in the contract why some FPF indicators carry more weight, to improve transparency.

Additionally, schools submit quarterly financials but we lack a system to verify their accuracy. As Commissioners have pointed out, this could be strengthened. On the technical side, the contract's reference to FASB should be updated to GASB, and the budget deadline might need to be revisited, since the current portal due date of September 1 may not meet the contractual 45-day post-state-budget requirement.

Finally, clearer language around affiliated nonprofits and lessons from past issues like Kamalani's would help improve oversight going forward.

narrative (in lay terms) that defines model would be helpful

sometime the model needs a bit more context (ex: a school that takes on debt to grow)

Other

Transcribed Notes	Key Themes	Feelings
<p><u>Stakeholder Perception of Contract 4.0</u></p> <p>The utility of 4.0 is as a guideline for policies and procedures - "Our Governing board has been using 4.0 to clarify school procedures" "4.0 is a guide for me as a new ED" "We do retreats and our NPO has an onboarding process [using 4.0] for new members" Our governing board president attends site visits and meetings [with the frameworks team] - she is very engaged (and understands 4.0 as a tool in this way) - Some things are specific and some are more vague, [for us it is a] resource and a tool that can assist with improvement, informs us, and [provides context for] agreement to what we are going to do</p> <p>There may be limitations in the contract but it doesn't limit you in your creativity... "is it really limiting you [as a po'o kula]?" - "Mindset that it's a growth tool can continue as long as there is the pilina with the schools" - Po'o kula leadership is informed by school systems, performance frameworks team, peer network, governing board relationship, and experiences to give perspective... and contract 4.0 as a guiding document... Have to be willing to reach out to network and stay with it - be resilient - Have to have a "this does not limit me" mindset - may not agree with [contract 4.0], there are things to comply with and there are implications for working with schools -</p> <p>Decision making processes for the school includes reviewing the contract (so it is always incorporated)</p> <p>"[our] governing board uses [contract 4.0] to help organize what is expected of us. We use the metrics to show how we are doing with other schools, as template format to get better as a school, and to help grow relationship between governing board and [school] staff"</p> <p>"We use [contract 4.0] to understand policies and procedures and for staff to administer policies & procedures... we rely on staff for how we are doing, numerical values can quickly tell us (governing board members)"</p> <p>"Our governing board uses [contract 4.0] to monitor the school... we monitor the budget via the reports, things like health and safety, take to heart the site visit findings, rely on po'o kula to report back so we stay in our lane; [tasks in 4.0] started as a checklist and has evolved as communication with [school] staff continues and grows"... but the mission and vision make us different from DOE and makes the comparisons irrelevant (regarding indicator #2)</p> <p>"Our governing board uses financial framework, it is a good guidelines, checkpoints that are clear to follow, it makes the discussion for new governing board members is really regarding mission and vision, appreciate that can have academic indicators unique to the student population [we are serving]"</p> <p>"Initially we used it as a checklist, have found more value (after clarity) that [4.0] can be used as a tool to improve the school - came with relationships with frameworks team"</p> <p>"We use [contract 4.0] to stay in compliance; contract does not limit in operationalizing mission and vision... not top of priority but seems pretty easy, minimal expectations"</p> <p>"We have to remember why we became a charter... don't want too many restrictions (otherwise we will be like DOE), but we're not limiting ourselves [with contract 4.0]... we chose to be a charter to be all that we could be to those who accept it, but we cannot forget about accountability to our parents and families and students... has [contract 4.0] limited me? No... is [contract 4.0] preventing me from achieving our WHY? No."</p>	<p>Clarity</p> <ul style="list-style-type: none"> • Communication & feedback loops • Comprehension of indicators, process, feedback, contract <p>Efficiency</p> <ul style="list-style-type: none"> • Usability (of framework, kuleana portal, metrics, indicators, contract) • Value, purpose & intent (of framework, metrics, indicators, kuleana portal, contract) • Appreciation (for contract, engagement process, the opportunity to share feedback) <p>Points of Tension</p> <ul style="list-style-type: none"> • Equity & Appropriateness of requirements • Autonomy, flexibility (of framework, metrics, indicators, contract) • Constraints of external dependencies <p>Opportunities</p> <ul style="list-style-type: none"> • Ideas/Strategies <ul style="list-style-type: none"> ◦ Best practices ◦ Weight tasks differently • Questions/issues to resolve and/or respond to 	<ul style="list-style-type: none"> • Confusion • Frustration • Uncertainty • Tension • Concern • Disempowerment • Perceived unfairness • Mistrust • Desire for open communication • Desire for tools & transparency • Creativity • Hope • Appreciation • Pride in mission

Contract Language & Interpretations

"Is there room for revisions and if so what are they?"

"Clarity of contract is situational"

How [can we] account for individuality within contract

"An ideal contract would respect our autonomy"

What would a negotiated contract entail? Comparisons - we want similar schools, not to be compared against each other/schools in the area... Growth indicator... Negotiation? Governing board being clear on kuleana

302.d and contract 4.0 need to align with each other... "Shall" – "may" and "will – may" language in the contract, whose interpretation matters? "Bilateral" "negotiate" (words that appear in contract 4.0 are also subject to interpretation "that does not align with 302d")

Ex: FERPA, contract provides access to student records but 302.d notes there are implications for material violation

Ex: contract cannot sign leases longer than term [this is stressful] - [we] want no term limit (right now it is 5 years)

Ex: virtual learning commission decides (6.5) but 302d 12f provides independent authority to manage education

Ex: contract 4.0 18.5 notes how contracts are terminated, 302d provides 4 ways "18.5 has added to the law"

How to uphold the intent of the charters and not be put in the box (like DOE) [which is why we became charters in the first place] - [it is a struggle], the story of charters is not the same as the story of the DOE "shouldn't have to be a take away model," "[we are] afraid of getting too big (like DOE)"

Commissioner site visits - "want them to see us" - IDEA: can Charter School Commission staff help facilitate their (commissioners) awareness of our schools? -

"Want to feel supported [by commissioners], come from the point of view of "how can we help" not compliance

"Can we have more transparency with decisions?"

"What's the due process?"

Wondering: "can we have links in the contract document to the referenced sections?" (for example when one part of the contract says to reference another section, provide a link to go there)

Feedback Sessions

Have the tone, topics of listening sessions changed? Meta analysis of all the 20+ years of listening, what has shifted? Or not? - "My shock was in the amount of engagement" - Tenor has changed, we have moved from more contentious to move collaborative

"What about the feedback from the last time?"

Understand does not mean agree (referencing the survey)

"Can we discuss the comments of the contract?"

Renewal Process

[SPCSC staff] will try to preload StriveHI data to give schools a chance to review

Window by law timing is bad, with the amount of time involved during holidays

[can we get a heads up] with the questions that will be asked, what materials have to be prepared, timeline and process

IDEA: can we think about the renewal process being done at the school site? ("the value of seeing [our mission] 1st hand")

"The renewal process will be almost on top of accreditation and very similar, can we consider combining in some way?"

Criteria for renewal is through interview – process, questions are not outlined – stakeholder group from older schools don't align with the subjective interview

"Can we stagger the renewal process for smaller groups (instead of having 23 renew at the same time)"

I think this contract is a large improvement over other variation of the contract. It is respectful of charter schools in being able to put our mission and our values at the forefront of the contract. I feel the commission has been very supportive in help schools respond to this contract. I think it can only get better from here.

I understand that we are an entity of the state, governed by state law, and that we have to do what we have to do. The contract is pretty clear to me.

I hope there will be a presentation overview at the onset of the meeting.

Thank you for allowing us to share.

It needs to be negotiated with each charter as prescribed in 302D-5 (4) Negotiating and executing sound charter contracts with each approved charter applicant and with existing public charter schools. Contract is defined as: a fixed-term, bilateral, renewable contract between a public charter school and an authorizer that outlines the roles, powers, responsibilities, and performance expectations for each party to the contract.

Mahalo for the opportunity to provide feedback. Malama pono.

For the most part, a contract is about compliance, and basic expectations for a school -- for financial, organizational, and academic. I do not rely on any contract documents to get a full and holistic picture of a school. To get a full picture of a school, I would read the contract outcomes, along with a school's WASC accreditation self-study and/or visiting committee report.

Mahalo nui team. I appreciate your solicitation of feedback on these processes.

This contract should be something that supports and allows school to work together with the Charter Commission. With WASC and audits coming from objective professionals, the contract creates not only excessive re-reporting but also allows for criticism from commissioners who may not have experience or background to be evaluating in certain fields. The contract should serve as a simple framework by which the schools and commission staff can valid the great work our charters are doing instead as a scare-based mechanism of bureaucratic red-tape that is used to penalize and shut down schools.

The Hawai'i Administrative Procedures Act (HAPA) is a law that dictates how state and county government agencies create rules and make decisions. It's essentially a rulebook for rule-making and

decision-making by administrative agencies. It requires state agencies to create rules based on statements of general or particular applicability and future effect that implements, interprets, or prescribes law or policy, or describes the organization, procedure, or practice requirements of the agency. The core functions of the Commission are statutorily set in §302D-5 Authorizer powers, duties, and liabilities. There are six essential powers and duties and "Negotiating and executing sound charter contracts with each approved charter applicant and with existing public charter schools" is the fourth of the six.

HAPA serves a critical role in ensuring fairness, transparency, and accountability in the rulemaking and adjudicatory actions of Hawai'i's state agencies. The Commission, as a state agency authorizing and overseeing public charter schools, falls squarely within the purview of HAPA. Applying HAPA principles to contract negotiations with charter schools strengthens public trust in the chartering process.

The federal Administrative Procedure Act (APA) serves as a model for HAPA and offers valuable insights. While the APA doesn't explicitly mandate rulemaking for every federal agency contract, it establishes principles highly relevant to Commission contract negotiations:

- **Public Notice and Participation:** The APA emphasizes public notice and opportunities for public participation in rulemaking. Similarly, charter schools and the public should have a chance to understand and potentially influence the standards and procedures governing contract negotiations.
- **Fairness and Consistency:** The APA promotes fairness and consistency in agency actions. Applying HAPA to Commission negotiations would ensure all schools are evaluated based on the same criteria and have the right to due process during negotiations.
- **Judicial Review:** The APA allows for judicial review of agency actions deemed arbitrary or capricious. HAPA would provide similar safeguards for charter schools if they believe the Commission acted unfairly during negotiations.

Benefits of Applying HAPA to Commission Negotiations:

- **Transparency and Predictability:** HAPA-guided negotiations would establish clear expectations and procedures for both the Commission and charter schools. This transparency fosters predictability and reduces uncertainty throughout the process.
- **Level Playing Field:** Clear rules ensure fairness by creating a level playing field for all charter schools, regardless of their negotiation experience or political connections.
- **Enhanced Public Trust:** By adhering to HAPA principles, the Commission demonstrates its commitment to a fair and accountable chartering process, strengthening public trust in the system.
- **Reduced Disputes:** A well-defined framework for negotiations minimizes misunderstandings and potential disputes, leading to a smoother chartering process for all parties involved.

Addressing Potential Concerns:

- **Flexibility and Innovation:** HAPA doesn't necessitate a rigid, one-size-fits-all approach. The Commission can still tailor contracts to individual school needs within the boundaries established through HAPA rulemaking.
- **Administrative Burden:** While implementing HAPA might require some initial adjustments, the long-term benefits of a transparent and fair process outweigh these concerns.

The Hawai'i State Public Charter School Commission could play a vital role in supporting innovative educational options for Hawai'i's students. By embracing the principles of HAPA and applying them to contract negotiations, the Commission would ensure a chartering process that is fair, transparent, and

accountable. This could foster trust in the system, empower innovation within a structured framework, and ultimately benefit students, educators, and the future of public education in Hawai'i.

Consider reviewing the feedback that was in the work sessions. Many people had ideas that were ignored. Get feedback from charter school leaders/governing boards. Work together to create an effective document.

It doesn't feel like it needs dramatic overhaul in its overall structure. I think a key question for the commission is if / how you use the next iteration of the contract to turn up the heat on schools that are not performing well. I don't have the answers or a recommendation, but IF this is a desire of the Commission, the contract has to be a primary vehicle to advance these objectives. And these are hard conversations, so best to start them soon.

None for now.

Contracts should be as school-specific as possible.

mahalo for the opportunity to comment :)

This document is a strong step forward from 3.0. It is heavily compliant driven which is good. However, charters also are required to be innovative and inform the greater Hawaii education landscape and this contract may stifle that. Can we find a middle ground that accomplishes both? This is the challenge. Pretty sure the innovative component comes from the academic framework and the MAI and School Specific measures pieces could provide the avenue to innovation.

The Charter Contract 4.0 presents a comprehensive governance framework, but could benefit from several enhancements to improve implementation and understanding across the charter school community.

A critical area for improvement is addressing the knowledge gap that exists among many schools regarding their contractual obligations. Evidence suggests many schools don't fully understand their contract requirements, leading to compliance issues that could be prevented through better education and resources.

Equally concerning is the inconsistent follow-through on identified compliance issues. There appears to be a systematic gap in the monitoring process where items flagged during annual reviews often receive no subsequent verification to ensure they've been addressed. This creates a compliance system that identifies issues but doesn't effectively close the loop on resolution, undermining the accountability the framework aims to establish.

To address these interconnected challenges, the Commission could:

First, create accessible contract guidance materials such as visual contract roadmaps, section-specific implementation guides, and compliance checklists to help school leaders navigate complex requirements.

Second, implement a structured follow-up protocol with clear timelines for remediation of identified issues. This should include documented verification procedures and specific consequences for continued non-compliance, ensuring that identified issues are genuinely resolved rather than simply documented.

Third, develop a peer mentoring system where experienced schools with strong compliance records support newer schools, fostering a collaborative culture around contract implementation and compliance.

Fourth, restructure the contract renewal process to include more incremental feedback opportunities rather than focusing exclusively on high-stakes evaluation points, helping schools identify and address potential issues before they become significant compliance concerns.

Finally, consider a modular contract structure with core requirements universal to all schools and specialized sections based on school model, development phase, and specific operational characteristics.

These improvements would transform the contract from a primarily documentation-focused instrument to an effective accountability tool that drives real improvement in school operations and ultimately better educational outcomes for Hawaii's students.

Mahalo for this opportunity to provide feedback. Most of our charter schools are providing an viable education option for the community and students. We need to figure out how to measure this success and tell its story. This is innovative practices of the commission while striving high to ensure that our haumāna are ready! We too, have to be outside of the box thinkers in order to recognize and articulate this well to our charters schools and stakeholders, and still hold our schools and us accountable to these measures.

This Contract 4.0 version has evolved and each version is getting better in each stage of its development. Mahalo Team

The contract needs revision. There are many areas in the contract that are not clear, redundant and or contradictory. The frameworks team went through the contract line by line to analyze these areas of improvement. Likewise, the frameworks should be developed by a cohort of stakeholders in the charter community and seeking input from the community as a whole. This ensure buy in. Along with that, the cohort mentioned above should also help to put together the accountability framework I mentioned in my other comments that details the specific interventions when a school is found to be out of compliance.

I like the improvements 4.0 has in allowing the schools to incorporate data other than state assessments. I also appreciate that schools have more support with ensuring they are on task with the expectation with the work the frameworks team is doing.

I really wonder if anyone outside of the Frameworks Team took the time to actually go through Statute and Contract line by line in an attempt to better prepare for school site visits, renewal, and possible changes to Contract 4.0 going forward.

Overall, I think Contract 4.0 is a strong, comprehensive improvement over Contract 3.0. It's especially encouraging to see how much more meaningful the APF has become. We've made real progress, and as staff, we've also done a lot to build stronger understanding with schools about the contract and what it requires. I think it's important to acknowledge how far we've come.

At the same time, I think we still need to keep working on making performance expectations across all three frameworks as clear and consistent as possible. That includes how performance is assessed and what the consequences are for schools when it comes to interventions and renewal decisions.

I also want to flag that there are still a number of inconsistencies and errors in the contract itself that need to be cleaned up. For example, enrollment caps are referenced in section 9.4 but not included in section 2.1. Similarly, a school's vision is mentioned in the APF Indicator 1 but doesn't appear in the contract itself. Addressing these gaps will help improve clarity and alignment.

First, I apologize if these questions are not helpful- I am still learning how the contract works. I did find the definitions very helpful. I also thought the expectations set in each section were thorough and creates clarity for what schools are accountable for. They also provide clarity on school's rights, which is equally important.

In the APF, where are the evaluation criteria for "meets/exceeds" and "does not meet" in the Strive HI reporting table, etc (p. 63-65 in the contract)? Why are supplemental points offered for comparisons with other schools (indicator 3) and site relevant diagnostics (indicator 4), and what are the criteria for "meets/does not meet" in those categories? How does offering these supplemental points affect evaluation of academic performance? 15 points is a lot. Could these additional points result in painting an overly positive picture of academic performance? What was the rationale for including them? Where did the 73 point cut off come from? I think what I am sensitive to is thinking about how this contract upholds accountability to academic rigor and quality instruction, and if there are ways these point systems allow users to manipulate the data so it creates inaccurate assessments of performance. What data is missing? Who is not included in this data story? Where could 'ohana satisfaction (SQS survey data) be included, or is that relevant?

I am also wondering about section 17.9 (p 47)- there are 2 terms that are well defined (NOC and NOD). What is the bolded "Notice of Warning" and is it implied to be the same as "Notification of prospect of revocation"? this might be a silly question

the contract represents a tremendous amount of work, time, effort, and I'm really impressed by it, by the willingness to engage with stakeholders on how to improve it, and for always marching in the direction of continuous improvement. It has changed so much, and that's reflective of many hard conversations and deep thinking. Mahalo for the invitation to give feedback, and e kala mai hana hou if this isn't helpful!

There were some terms that seemed vague, especially in the academic framework sections, such as "make substantial progress towards achievement of the performance standards" and "demonstrate consistent improvement on overall scores"

The contract makes sense, but I am concerned about the section regarding EL education, and if the language in the contract aligns with the Commission's goals. As it reads now, charter schools must align with all of the guidelines outlined in the EL Manual, including instruction. I would like to ensure there is room in the contract wording to ensure schools have autonomy in regards to EL education. Mahalo for allowing me the opportunity to provide feedback on the contract.

Academic Performance Indicators The APF, is comprised of four (4) indicators, two mandatory indicators and two supplemental indicators as follows: (a). Mission Aligned Initiative (MAI) (Mandatory) - measures mission-focused educational goal(s) through documentation and a written narrative to be submitted to the Commission. (b). Standardized Assessments (Mandatory HRS §302D-16). What is the weight given to MAI versus S.A.? Is it the same or more emphasis on SA?

I marked "Somewhat Understand" as I can see that the contract is very straight forward, But I do not know the detailed intricacies of certain area that are not in my purview or part of day to day job duties. Mahalo to the Team that put this great document together! Awesome work Team! Aloha

Despite understanding the sections of the contract, there are several revisions that need to be made.

New Charters should be granted to a school contingent on them finding a highly qualified school leader to open the school and get systems in place. There are a lot of schools where the lack of leadership

experience and knowledge is having a direct impact and negative effect on the students that they are supposed to be serving.

I feel like I have a solid understanding of the charter contract and the performance frameworks but I think there are a couple areas that could be clearer for both schools and staff. Specifically, the intervention protocol and the renewal process. It's not always clear what crosses the line for a Notice of Concern, Notice of Deficiency, or even a potential nonrenewal.

I've seen some inconsistencies in how those decisions have been applied in the past, which I think has created confusion and sometimes frustration on both sides. The Kamalani renewal also showed how there's room for different interpretations of the statutes and rules, which makes things even murkier. Tightening up that language and process in the contract itself could really help build more clarity and trust moving forward.

Appreciate opportunities for stakeholders to provide feedback- it's very important in strengthening commission's work and relationships with communities

need to figure out how post-high school outcomes are included for secondary schools

Appendix B

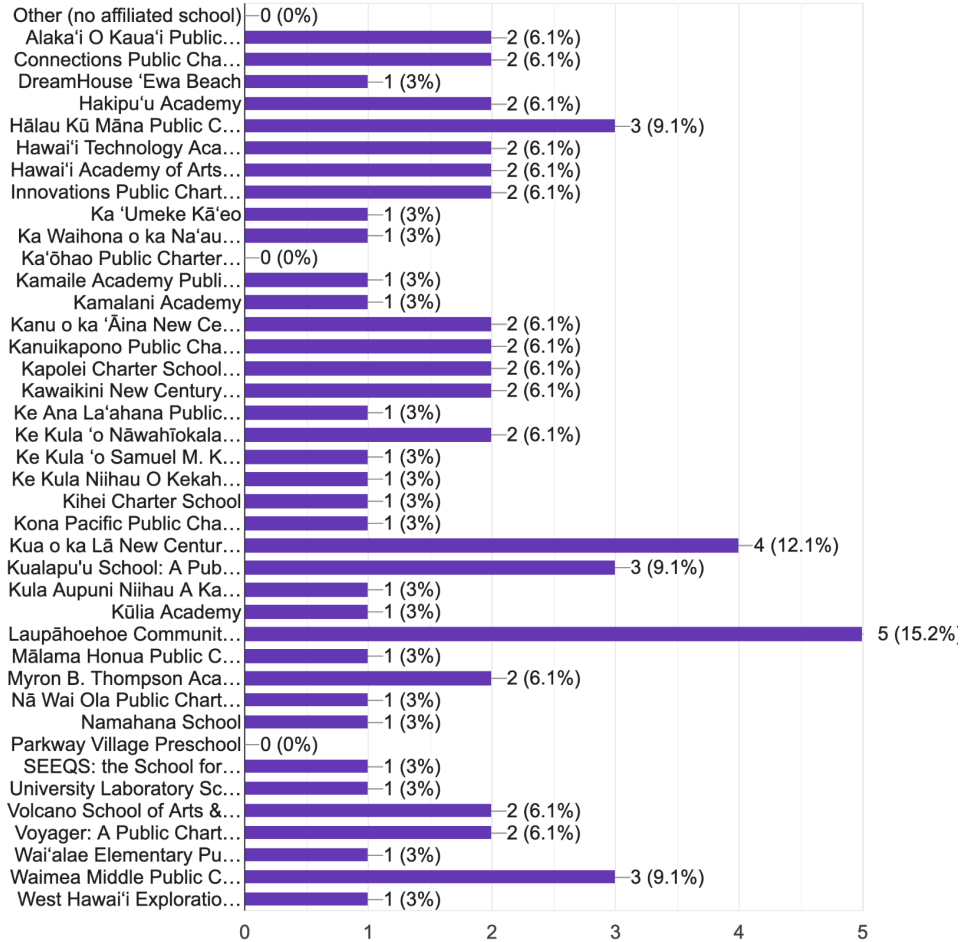
Online Form Results

Screenshots from Google Forms for school responses are provided in this section

Open ended responses were included as part of the transcription (Appendix A) and coded for themes

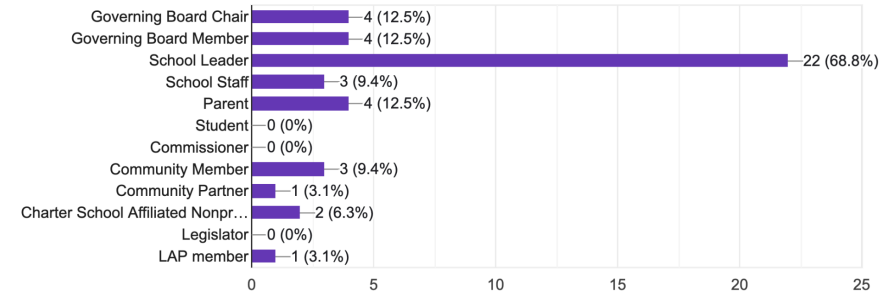
School (if applicable)

33 responses



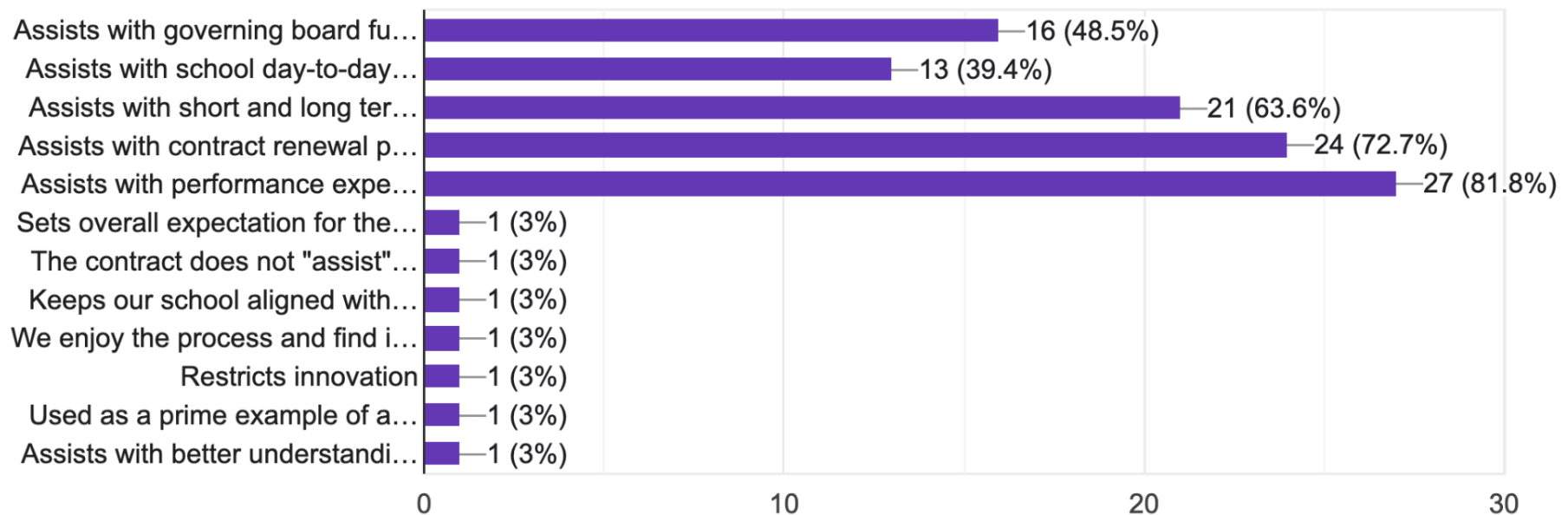
Role (select all that apply)

32 responses

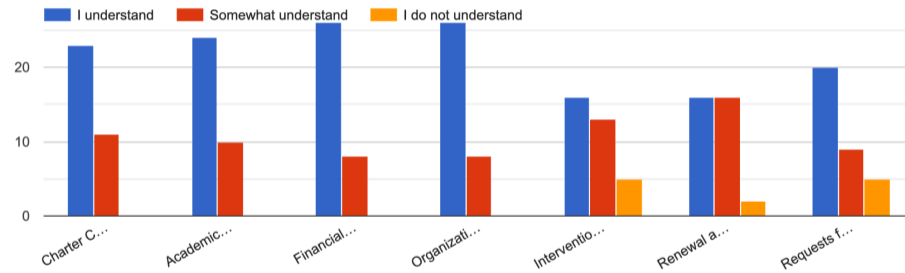


How does the current Charter Contract 4.0 guide and support your role and/or work with the charter school.

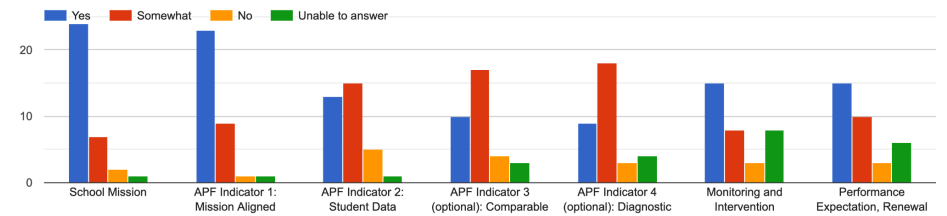
33 responses



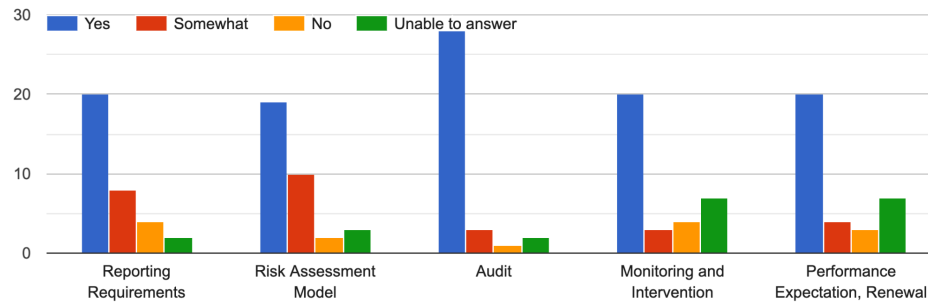
Rate your understanding of the expectations of charter contract 4.0?



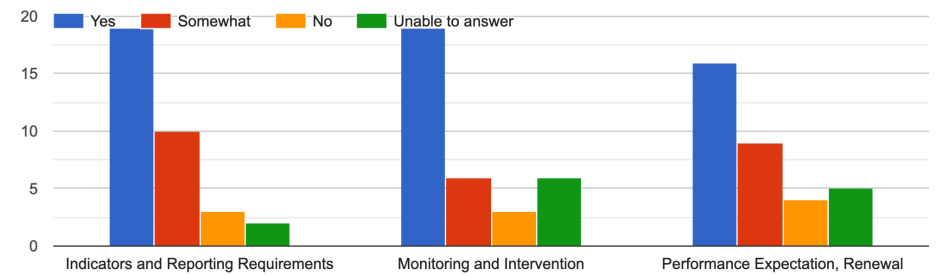
Reflecting on the current indicators of the Academic Performance Framework, rate if they provide a comprehensive profile of your school.



Reflecting on the current indicators of the Financial Performance Framework, rate if they provide a comprehensive profile of your school.



Reflecting on the current indicators of the Organizational Performance Framework, rate if they provide a comprehensive profile of your school.



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