



# Understanding the Strategic Plan

*Charlene Hoe of the Office of Strategic Planning/ Strategic Planning Enhancement Group examines the roadmap that is the Kamehameha Schools Strategic Plan*



Charlene Hoe

**A**s director of the Office of Strategic Planning/Strategic Planning Enhancement Group (OSP/SPEG), there is perhaps no one at Kamehameha Schools who is more familiar with its Strategic Plan than Charlene Hoe.

Formulated in response to community and stakeholder input and adopted in October 2000, the plan is now in its second phase of implementation.

Phase II of the Strategic Implementation Plan, unveiled in October 2001, outlines the development of Kamehameha programs and services and sets institutional goals for the next five years.

Hoe recently sat down with *I Mua* in an effort to help everyone better understand why and how Kamehameha Schools is moving in the direction it is.

***I Mua:* How does Phase II of the Strategic Implementation Plan differ from Phase I?**

**Hoe:** First, let me say that the ultimate mandate of the Strategic Plan is for Kamehameha Schools to extend the reach of its programs and services to more of the Hawaiian population.

Essentially, the first phase was completed at the executive level right after the adoption of the plan. We tried to help position the institution to be able to deliver on the promise of the plan and to take advantage of any initiatives that were already on our plate. The decision to go K-12 with our Hawai'i and Maui campuses; the expansion of our K-3 reading program, and the reinitiation of a collaboration with the state Department of Education (DOE) for summer school offerings are all examples of Phase I initiatives.

Phase II goes to that commitment to involve stakeholder input. Now that we have the foundation in place to move forward, Phase II details specifically what we're going to do in the next five years to try and achieve the goals in the plan.

***I Mua:* How did Kamehameha Schools make the decision to reach out to more Native Hawaiians, and how is this goal in accordance with the will of Princess Bernice Pauahi Bishop?**

**Hoe:** The will does say her trust will establish two schools, one for boys and one for girls. Through the course of Kamehameha's more than 100-year history, the specific way that's been addressed has changed from time to time, to hopefully better meet the needs of the Hawaiian community.

In fact, in 1962 Kamehameha went to the courts and received permission to expand services with programs like post-high scholarships, adult education and early childhood initiatives.

As we went through the strategic planning process, it became clear to us through the discussions with our community that the need was even greater. And as we looked at Pauahi's mandate to the trust and the surrounding documents of her life and times, and those of Charles Reed Bishop after her, we felt Pauahi chose education as a strategy to improve the well-being of her people. More specifically, we felt that was what she was asking in her will.

***I Mua:* Wouldn't you agree that, while a very noble goal, attempting to improve the well-being of an entire people is a monumental task?**

**Hoe:** I'm very excited by what we're doing, but very humbled as well. You're right, this is a very daunting task and clearly, we can't do this by ourselves. And working with others is always a challenge to do it in a way that honors all parties' strengths. I think we've cut out major work for ourselves.

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***I Mua:* How much of the work can Kamehameha Schools carry?**

**Hoe:** Clearly, we are limited by our resources, whatever they are. Regardless of the level of our endowment, we do not have the resources to do it ourselves – we don't have the resources by ourselves to meet the need.

Can we provide the same level of services to all Hawaiians in the community? There's no way we can do that. Can we somehow be involved in bringing resources to meet the educational needs, or at least help improve the environment for learning for the Hawaiian community? Absolutely yes – as long as we engage with others to do that, and to me, that engagement should involve anyone who shares our mission.

***I Mua:* And that includes collaborating with the state Department of Education?**

**Hoe:** That's where most of the Hawaiian students in our state are in the K-12 age group. The hope is that we can support the DOE efforts and help raise the bar of education in the state of Hawai'i, and by doing so create a greater voice for improvement of education – thereby affecting education across the board. That's the hope. And we're not the only ones who are out there trying to work on educational reform and improvement, the charter school movement is clearly another.

***I Mua:* What are the major themes of the Strategic Plan, and what kind of financial commitment is Kamehameha Schools making toward those goals?**

**Hoe:** There are seven strategic institutional goals, or directions, contained in this implementation phase. Those areas are early childhood; quality K-12 education; career awareness and options; community capacity for education; learning environment; resource development to support reach; and *'ike Hawai'i* (the study of all things Hawaiian).

Each year, funds are earmarked for this expansion. For the 2002-2003 fiscal year, which begins in July, Kamehameha Schools has approximately \$21 million available for Phase II initiatives.

*We need to keep everyone aware of what the needs are, and what we're doing to address those needs, so that people can see the relationship between the two.*

***I Mua:* Earlier, you said the ultimate mandate of the plan was for Kamehameha to extend the reach of its programs and services. How would you define "reach" in this instance?**

**Hoe:** When we talk about expanded reach in our implementation plan, we are not talking about doing exactly what Kamehameha has done in the past – provide full-time K-12 educational services to a limited number of Hawaiians. We're talking about finding ways to address the educational needs of the Hawaiian community using many different approaches.

We have to do that. If we were just going to continue what we have been doing, we'll only be able to expand to another 1,000 students and that's about it. Kamehameha funded and delivered full-time programs is the most expensive approach. We can either expand just a very little, or find other ways to expand greatly. That's what we've opted to do.

***I Mua:* So when people hear that Kamehameha Schools is now going to "serve" or "touch" them, what exactly does that mean?**

When we use terms like reach, serve or touch, we're using those terms in their broadest interpretation or definition. Sometimes Kamehameha may simply make material available to people so that they can follow up on their own.

For example, we've found that our Hawaiian community on the continental United States is very interested in gaining more access to cultural material or material directly related to Hawai'i. Well, we can't take Hawai'i to the continent, but we can use distance learning technology to make cultural material and classes available worldwide. Or, Kamehameha may help enable other agencies to expand their services more broadly into the Hawaiian community.

***I Mua:* So we're actually talking about the worldwide Hawaiian community?**

**Hoe:** We're getting to the point where half of our Hawaiian community will live outside of the state of Hawai'i (see graphic on page 15). We don't want to forget about half of the Hawaiian community, and we need to figure out ways to stay connected to that community – whether it's by distance learning, networks established through our alumni association or by collaborating with other Hawaiian organizations.

***I Mua:* In extending its reach in the Hawaiian community, will Kamehameha cut current programs and services?**

**Hoe:** Top and foremost, above the seven directions of the plan, is a mandate from the trustees to maintain the excellence of current programs. You could say that's the eighth direction of the plan.

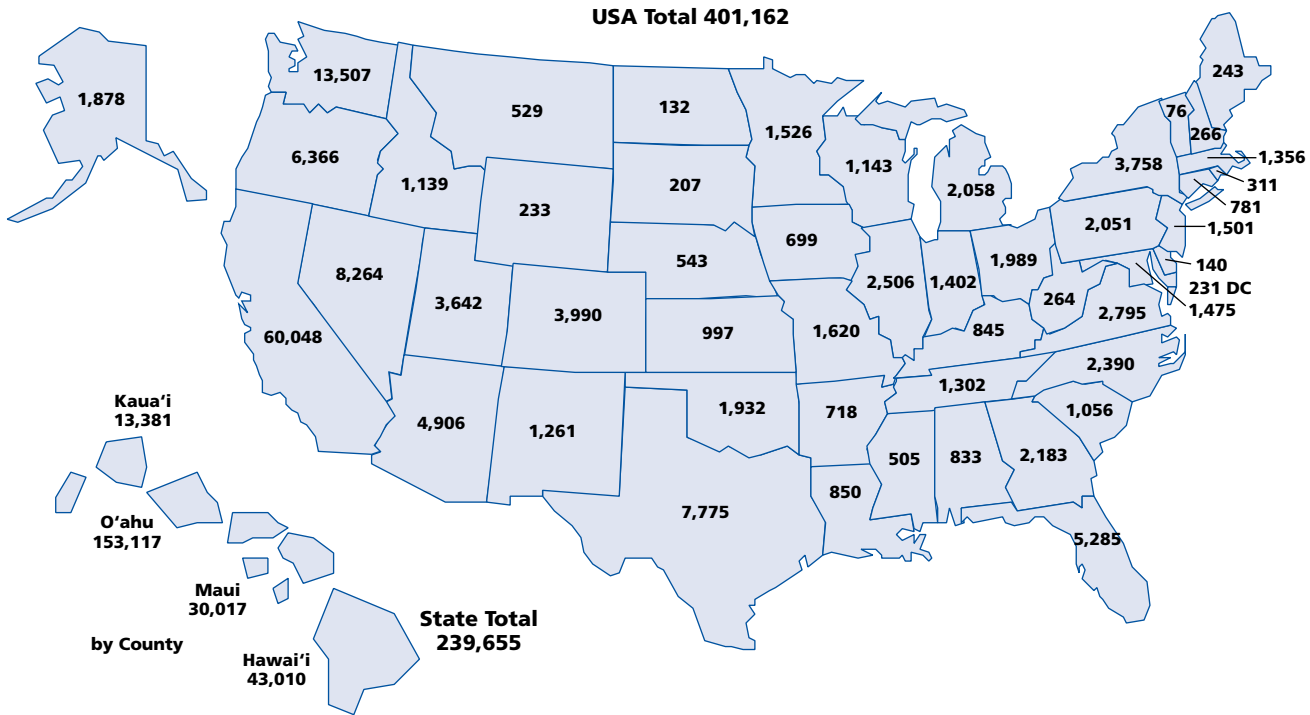
As we move forward, extending our reach shouldn't deteriorate the excellence of our current programs. Ultimately, it is everyone's responsibility across the institution – from trustees on down – to ensure that it doesn't, by looking at budgets and making sure that each dollar is important to the delivery of excellence. And if it isn't, then reallocating that dollar.

***I Mua:* How will the success of these new initiatives be measured?**

**Hoe:** Phase II of our plan contains benchmarks to measure against, and we have targets both financially and in numbers served for all of the initiatives.

In all of our new endeavors, we're asking staff to develop the benchmarks that they want that particular effort to be measured against. And then PASE (Kamehameha's Policy Assessment and Systems Evaluation department) is expected to help evaluate the success of that ongoing effort. Once we get feedback on the effectiveness of the project, we can determine whether to expand, adjust or discontinue it.

# Hawaiians in the 2000 US Census



***I Mua:*** How will people be notified of a particular program or project?

**Hoe:** Communication is going to be a major issue, both internally and externally. We need to keep everyone aware of what the needs are, and what we're doing to address those needs, so that people can see the relationship between the two.

Every department at KS is conscious of the need for better communication, and we're trying to design better ways of communicating. But once these programs begin to roll out, like preschool scholarships for instance, they will be promoted in the various media.

***I Mua:*** As your department has gone out into the community, what has been the general reaction to the plan?

**Hoe:** Actually, the feedback has been very positive. People have been especially supportive of the concept of extended reach. Each meeting has been helpful in clarifying our own vision and identifying issues that we may not have been aware of.

We've had charitable foundations approach us and ask to join in some of the initiatives, and

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that's almost unheard of. And other community organizations have said "We're already doing this piece – can we work together on that piece?"

We want and need to maintain those relationships we built when we were doing strategic planning. We're really trying very hard to make that plan that we created together live.