

# Westlake Charter School

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## Final Strategic Plan\*

*Approved May 16, 2005*

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\* This plan was developed using techniques and knowledge developed by Tecker Consultants, LLC.  
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*OVERVIEW*

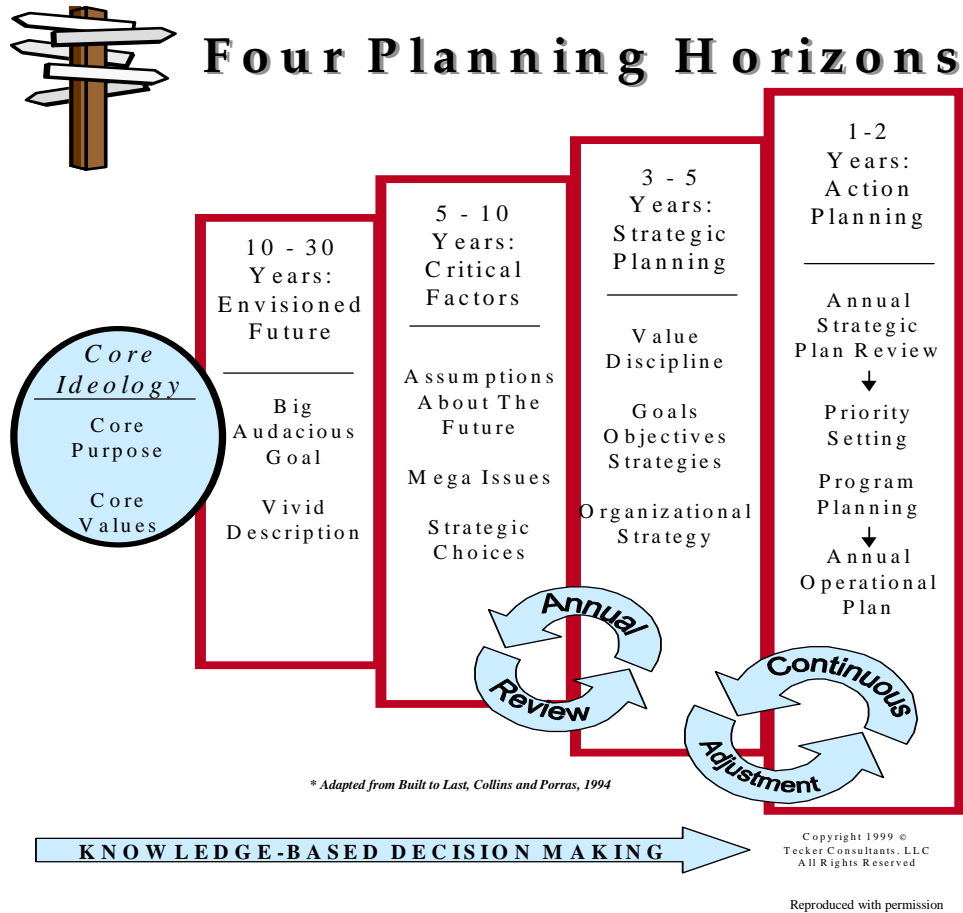
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In early 2005, a group of devoted Sacramento citizens began an effort to create a new charter school that would uniquely serve the educational and personal development needs of Sacramento's youth.

As part of this effort, a core group of citizen leaders initiated a strategic planning and thinking process to facilitate the creation of a strong and vital charter school. This process will be *ongoing* and will facilitate (a) the charter school's identification of the educational/developmental needs of our children and (b) the school's options for satisfying those needs. The results of this plan will initiate choices that the school will make for future success.

On **April 13, 2005**, the leadership of the school began the strategic planning and thinking process with a discussion about current conditions and future assumptions regarding the elementary education needs of the Natomas community. This information was used to form an initial set of options for defining the school's core ideology and envisioned future. The framework used for this initial discussion and the entire planning process is a model of strategic judgments organized into four time-related horizons outlined on the next page.



Using the Four Planning Horizon's model as a framework, and results from several information collection opportunities, the session participants created the following:

- A set of assumptions about the future that will drive the educational/developmental needs of the present.
- A list of relevant factors in the long-range horizon (10-20 years into the future), core purpose, core values, and a Big Audacious Goal (BAG).
- Five goal areas that identify where the charter school will direct its resources over the next several years. The goal areas focus on outcomes beneficial to the charter school, its students, our community and our world.

On April 18, 2005, the draft strategic plan was posted on the Westlake Charter Elementary School website, along with a request to provide feedback via an online survey before April 25, 2005. This request was also proactively emailed

to the stakeholders included on Westlake Charter Elementary email distribution list. On **May 4, 2005**, the leadership of Westlake Charter Elementary met to consider the feedback provided by 38 respondents and make revisions to the strategic plan as appropriate.\* This document represents the version of the plan which was formally adopted by the Board of Directors on **May 16, 2005**.

Now that the plan has been adopted, the leadership group will once again come together to create an *operational plan* that will enable the school to work towards its strategic goals. The key link between the operational plan and the strategic plan will be **strategic objectives** which will be *measurable* targets the school can use to assess its progress towards achieving the 3-5 year goals set within the strategic plan. Once the strategic objectives are identified, specific 1-2 year **action plans** will be developed that will detail the activities, budgets and individuals responsible for meeting each identified objective.

### **An Ongoing Process of Thinking Strategically**

It is important to note that core group of citizen leaders view this strategic thinking and planning process as an **ongoing process**. This is not simply a project that will be completed with the adoption of document entitled “Westlake Charter School Strategic Plan”. Adoption of a plan will simply be an affirmation of the general intent and direction of the school as described by the core ideology and goals. Progress toward achieving strategic objectives of the plan will be assessed annually, and the plan will be updated as objectives are met and as the needs of the school, students, teachers, parents and community evolve.

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\* Appendix A details salient comments, questions, and suggestions received from stakeholders during the comment period and the leadership’s response.

**10-30 YEAR PLANNING HORIZON**  
**~ CORE IDEOLOGY & ENVISIONED FUTURE ~**

*“Core ideology describes an organization’s consistent identity that transcends all changes related to its relevant environment. It consists of two elements - **core purpose** – the organization’s reason for being – and **core values** – essential and enduring principles that guide an organization. An organization’s **big audacious goal** conveys a clear and compelling catalyst that serves as a focal point for effort.”\**

## **Core Ideology**

### **Revised Draft Core Purpose:**

Expanding opportunities...connecting children to the world.

### **Revised Draft Core Values:**

Westlake Charter Elementary School values the following:

- Respect
- Excellence
- Responsibility
- Curiosity
- Confidence
- Diversity
- Community
- Joyful learning

### **Revised Draft Big Audacious Goal**

Westlake Charter students are internationally recognized as ambassadors of global learning and catalysts of change.

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**5-10 YEAR PLANNING HORIZON**  
**~ ASSUMPTIONS ABOUT THE**  
**RELEVANT FUTURE ~**

*“In order to make progress towards achieving the 10-30 year Big Audacious Goal; an organization must constantly anticipate the strategic factors likely to affect its ability to succeed, and to assess the implications of those factors. This process of building foresight about the future will help [Westlake Charter School] to constantly recalibrate its view of the relevant future, a basis upon which to update the strategic plan on an annual basis. As the outcome-oriented goals that will form the basis of the long-range strategic plan will be based on this foresight, annual review of these statements will be an appropriate method of determining and ensuring the ongoing relevance of the strategic plan.”\**

**Assumptions** – During the April 13 meeting, the core group of leaders made several assumptions about the future that are likely to drive the educational/developmental needs of today. These were revised on May 4, 2005 pursuant to information obtained through the feedback process.

**Global**

1. Many countries other than the US will have developed successful systems for educating and developing their youth/future scientists, workforce, etc.
2. Significant innovations and advances in technology will increasingly be developed by countries other than the US
3. Evolving technology, politics, and transportation will make the world “smaller”
4. Our economy will become increasingly global in nature
5. Demands on our environment and natural resources will necessitate increasing cooperation among nations to develop environmental awareness and effective conservation efforts
6. Increases in immigration and interracial relationships will result in increasing ethnic blending/diversity in our country and internationally
7. There will be many opportunities to learn valuable lessons from actions/events of other societies/cultures

**Educational**

1. There will likely be certain economic and political pressures that make it increasingly difficult for teachers to succeed
2. There will be a shift away from a focus on rigid standards/test scores

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3. School sizes will be smaller
4. Parents will be increasingly open to non-traditional methods of education

**Societal**

1. Knowledge is changing at an exponential rate
2. Most individuals will have multiple careers in their lifetimes

**Implications for the charter school:** If these assumptions hold to be true, several implications could be drawn for the school including:

- A significant degree of understanding, and respect for other cultures/nations will be required for individuals to function effectively in the future
- A great amount of creativity will be needed to facilitate effective educational experiences and necessary parent involvement
- Educational programs need to ensure children master critical skills, and also how to work effectively with diverse types of individuals, how to think, how to communicate and how to learn throughout their lives.

**3-5 YEAR PLANNING HORIZON**  
**~ OUTCOME-ORIENTED GOALS ~**

*“The following thinking represents goal areas for the next three to five years. They are areas in which the [charter school] will explicitly state the conditions or attributes it wants to achieve. These outcome statements define ‘what will constitute future success.’ The achievement of each goal will move the organization toward realization of its Big Audacious Goal. The goal areas are not in priority order. “\**

### **Revised Draft Goal Areas**

#### **Goal Area: Academic Excellence**

The Westlake Charter School has a rigorous educational program/curriculum that has narrowed the achievement gap and resulted in its student body achieving excellence as defined by broadly accepted standards.

#### **Goal Area: Educational Philosophy**

The Westlake Charter School provides educational and personal development opportunities that are specific to a student’s unique interests and needs. These opportunities:

- Cultivate an international mindset while developing an awareness of and appreciation for each student’s own culture
- Lead to proficiency in communicating in a foreign language
- Are infused throughout every aspect of the school including its curriculum, physical/extracurricular activities, facilities, etc.

#### **Goal Area: School Culture**

Students, teachers, administrators, and parents associated with the Westlake Charter School are proud to be part of a community of committed individuals who trust each other to contribute to the achievement of the school’s goals.

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**Goal Area: School Infrastructure**

The Westlake Charter School has in place effective governance and operational structures that ensure the school's ability to:

- Be financially sound
- Remain nimble and flexible
- Provide the necessary resources, materials and training to achieve its academic and educational philosophy goals, and obtain its own school site

**Goal Area: Community Perception**

The Westlake Charter School is broadly recognized for its academic excellence, its involvement within the community and as the school of choice.

## Appendix A – Strategic Plan Comment/Response Document

### Assumptions About the Future

**Comment:**

One individual suggested using a more inclusive word than “marriage”.

**Response:**

“Marriage” was substituted with “relationships.”

**Comment:**

One individual questioned whether parents would be increasingly uninvolved in their children’s education.

**Response:**

This assumption was deleted

**Comment:**

It was suggested that the following societal assumptions be added: “Knowledge is changing at an exponential rate” and “Most individuals will have multiple careers in their lifetimes.”

**Response:**

These assumptions were added.

**Comment:**

It was suggested that implications be added relating to

1. Extended daycare/vacation learning opportunities
2. The ability to work effectively with others to achieve a goal and embracing of the concept of individuals having different talents and perspectives which creates synergies will be critical to individuals’ success in the future. Mastery of skills in team-building, team-playing, and maximizing synergies will be critical.
3. The charter school experiences needs to expand children’s horizons to include a variety of possible futures and help them to develop the skills, flexibility and attitudes for lifelong learning and change.

**Response:**

1. The leadership group thought this was a valid statement but didn’t want to have these programs automatically become the responsibility of the school itself. There was discussion that perhaps the parents/community would take a leadership role in this regard.

2. The group felt that this concept was previously addressed.
3. The group felt that this was already stated elsewhere in the plan.

**Comment:**

It was suggested that an implication be added stating that the charter curriculum and programs need to ensure children master critical skills, but also how to work effectively with diverse types of individuals, how to think, how to communicate and how to learn throughout their lives.

**Response:**

An implication to this effect was added.

## CORE PURPOSE

**Comment:**

It was suggested that this idea include “exploring and encouraging the unique talents of students in order to connect them to the world.”

**Response:**

It was felt that this concept would be better addressed in the *Educational Philosophy* goal area.

**Comment:**

One stakeholder commented that “connecting children to the world sounds “too corporate minded” and another did not understand how “connecting children to the world has any relationship to educating elementary school children.”

**Response:**

The leadership group felt that that the draft core purpose is a natural fit with the school’s international curriculum and since the curriculum is an elementary school curriculum, it is appropriate for this kind of elementary school.

**Comment:**

One individual suggested “Expanding opportunities...preparing leaders for our global community.”

**Response:**

It was felt this statement would place an emphasis on leadership and could be too restrictive.

**Comment:**

A couple of individuals commented that “expanding opportunities was too vague.” One suggested that the statement be changed to “expanding *educational* opportunities”.

**Response:**

The group decided not to specify “expanding opportunities” any further because it wanted this statement to relate to a variety of opportunities such as opportunities for parents to send their children to a different type of school, opportunities for children to be able to learn and/or be exposed to different languages and arts, opportunities for graduates to have different types of careers because of what they learned at Westlake Charter Elementary, etc.

## CORE VALUES

**Comment:**

Several individuals commented that many or all values need to have definitions or descriptions so as to be more specific and concrete.

**Response:**

After significant discussion, the group decided that the core values should not simply serve as a list of desired behaviors, but more importantly act as guiding principals that help the school set strategy, prioritize activities, and make difficult decisions. While some individuals may not agree on the exact definition of a given value, the group felt that in a specific situation, it is fairly easy to recognize when an action is or is not in alignment with that value. Because of the need to have the core values be applicable in a wide variety of situations, the group decided against adding definitions or descriptions.

**Comment:**

Several individuals commented that some of the listed core values were not truly values. There was specific discomfort with “Happy” and “Inquisitiveness” and “Community-minded”.

**Response:**

The leadership acknowledged the awkwardness in “Happy” “Inquisitiveness” and “Community-minded”. Consequently they changed them to “Joyful Learning,” “Curiosity,” and “Community” respectively. The group further acknowledged that some of these may not be true “values” per se and therefore

decided to designate this list as a list of convictions, beliefs, behaviors or traits that are valued by the school.

**Comment:**

One individual commented that “Well-Rounded” overlapped with “diversity”.

**Response:**

The group concurred that well-rounded is really a “diversity of experiences/knowledge/skills” and consequently eliminated “Well-rounded.”

**Comment:**

One respondent was not clear about “what means to be community minded.”

**Response:**

The group thought this could be clarified by simply stating that “Community” is valued by Westlake Charter Elementary School.

**Comment:**

One individual suggested adding “Tolerance and embracing of differences,” “Innovative/Creative,” and “Flexible.”

**Response:**

The group felt that these values were included within the scope of the others that were decided upon.

## **BIG AUDACIOUS GOAL**

**Comment:**

Several respondents commented that this goal seemed too large and ambitions, and perhaps even unattainable. Another individual stated that using the term “audacious” implies that the goal is absurd. Yet another stated that using “audacious” made it sound like “we are at the beach with a bunch of teenagers.”

**Response:**

The leadership discussed these comments and decided that the exact purpose of a 10-30 year “Big Audacious Goal” is to be exactly that: big, and audacious. In reviewing the definition of audacious (daring; spirited; adventurous) the group felt that it was appropriate to use.

**Comment:**

One individual commented that the school should offer Chinese or Japanese as a foreign language.

**Response:**

While an important comment, this level of specificity is not germane to a high-level strategic plan. The Board will consider this comment at a later date.

## GOAL AREAS

**Comment:**

One individual suggested that “Academic Excellence” be the first goal area listed in the plan.

**Response:**

While in the strategic plan it is stated that the goal areas are not listed in priority order, the group decided to go ahead and move this goal to the beginning.

**Comment:**

One respondent asked for specifics on what is meant by “achievement gap” and “broadly accepted standards” in the goal area on Academic Excellence.

**Response:**

As this is a 3-5 year goal, there is a good likelihood that the specifics of what determine the “achievement gap” and a school’s “academic excellence” will change. The group intentionally used somewhat vague terminology in the strategic plan to ensure that this goal remains relevant within the context of rapidly evolving educational standards. The true specifics which will be spelled out in the 2-3 year strategic objectives and action plans will be determined by the Board and staff in the school’s operational plan.

**Comment:**

In the “Educational Philosophy” goal area, it was suggested that a better work for “nationality” be used (e.g. heritage, ethnicity, etc).

**Response:**

“Nationality” was stricken. The group felt simply referencing “culture” alone was sufficient.

**Comment:**

In the “Educational Philosophy” goal area, one individual was unclear as to what was meant by “physical plant”.

**Response:**

“Physical plant” was substituted with “facilities”.

**Comment:**

One respondent questioned “why focus on the international? What if a student wants to have a good job in the United States?”

**Response:**

The leadership group determined that in light of globalization, it is likely that virtually everyone will need to interact with individuals from other cultures, even if they only work in the United States.

**Comment:**

A couple respondents inquired as to where physical education fits into the plan as there was no mention of it.

**Response:**

A reference to physical education was added to the goal on educational philosophy.

**Comment:**

One individual stated: “Bring in the deaf community – to teach awareness.”

**Response:**

This is a concept that is too specific for a broad strategic plan. While it definitely supported by the core ideology and goals detailed in the plan, the exact method by which it may be addressed will be determined by the Board, administration, and faculty at a later date.

**Comment:**

On respondent questioned whether the school really desires to be recognized for “outreach and involvement - why not academic excellence?”

**Response:**

The Community Perception goal area was modified to include recognition for academic excellence.

**Comment:**

Several individuals commented on having the school be recognized beyond Sacramento.

**Response:**

The Community Perception goal was modified to have the school be “broadly recognized for its academic excellence...”

**Comment:**

One individual expressed concern that the wording of the Community Perception goal suggested an air of arrogance related to “being the best.”

**Response:**

The Community Perception goal was re-worded which hopefully softens the tone. However, the leadership group felt that it is still appropriate to strive towards becoming “the school of choice” as this should foster competition amongst educational institutions and improve the quality of education across the board.