

**LEWIS CENTER FOR EDUCATIONAL RESEARCH**

**STRATEGIC PLAN**  
**July 1, 2019 – June 30, 2024**

**The plan for our future**

**Adopted October 14, 2019**

**Lewis Center for Educational Research  
STRATEGIC PLAN**

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**Lewis Center for Educational Research**  
**STRATEGIC PLAN**  
**The plan for our future**

**Our Plan**

Our plan charts a course that is bold yet attainable. Our vision calls for the Lewis Center and its schools to be nationally recognized as successful role models for others wishing to provide relevant education and unlimited opportunity to those they serve – as we do. The plan lays out how we, an operator of two uniquely different charter schools serving two distinctly different demographics, will align our efforts over the next years to achieve the goals our students, parents and communities have a right to expect and enjoy.

We recognize our responsibility and the leadership we have been entrusted to provide. We also recognize the value and impact of what becoming a model institution of our kind can mean. The stakes are high, but so is the opportunity when our vision is achieved.

**MISSION**  
**Why we exist**

The mission of the Lewis Center for Educational Research is to ensure student success in a global society through data driven and research-based schools and programs that are safe, innovative and culturally inclusive.

**VISION**  
**What we want to be known for**

The Lewis Center for Educational Research is internationally recognized as a leader in education due in part to its unique, long-term partnership with NASA. The Lewis Center's two award-winning TK-12 charter schools are model programs for STEAM and World Languages.

The Lewis Center is deeply involved in serving its two communities — the High Desert and San Bernardino, as well as the greater educational community — through its local and global programs.

The Lewis Center's excellent reputation can be attributed to its highly qualified, enthusiastic staff who — with the support of engaged parents, Board members and stakeholders — ensure students achieve at the highest academic levels.

## VALUES

### **Ethical priorities to guide our decision-making and our treatment of one another**

**Integrity:** We strive to engender trust in our intentions and abilities by acting courageously and adhering to a strong moral compass.

**Excellence:** We aspire to excellence through supporting our community of learners in the practice of continuous innovation, collaboration and growth.

**Leadership:** Being forerunners, pace-setters and cultivators, we demonstrate strong leadership rooted in principles of integrity, accountability, respect and communication.

**Inclusiveness:** We will leverage our diverse and inclusive community to achieve superior results in the field of education.

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**GOALS  
Goals to achieve our vision  
(Updated Annually)**

**Financial/Fiscal**

Goal 1: Build the financial capacity of the LCER, including key provisions for sustainability.

**Facilities**

Goal Two: Develop and maintain facilities to meet the TK-12 needs at both campuses.

**Student Success**

Goal 3: Strengthen the academic programs at both schools resulting in increased student mastery while preparing every student for post-secondary success in the global society.

**Staffing**

Goal 4: Recruit, develop and retain a highly qualified and diversified staff.

**Organizational Effectiveness**

Goal Five: The Lewis Center for Educational Research will communicate and operate under a common vision, mission, goals and objectives.

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**OBJECTIVES  
The outcomes we expect**

**Financial/Fiscal**

**Goal 1: Build the financial capacity of the LCER, including key provisions for sustainability.**

- 1.1 Objective: Each school will maintain a reserve balance of less than 4% of the total operating budget. Reserves will be defined as unencumbered cash balance.  
Strategy: The annual budget will be developed with reserves set aside to meet this goal and build the cash fund balance for each school.  
Strategy: Savings from personnel vacancies will not be allocated to meet other needs within a budget cycle.  
Strategy: A deferred maintenance plan will be considered in the development of the annual budget.
- 1.2 Objective: Support oversight and accountability of funds by LCER budget managers through monthly financial reports which include budget-to-actuals.  
Strategy: Staff will utilize the purchasing procedures across the organization to ensure accuracy of monthly reports.  
Strategy: Hold mid-year budget workshops with all budget managers.  
Strategy: Hold annual budget workshop with Board and Executive staff.
- 1.3 Objective: Most restrictive dollars (i.e.: categorical funding, one-time monies, Special Education funding, grants, etc.) will be utilized first and according to funding requirements and as approved by School Site Council.  
Strategy: Principals will receive clear communication regarding all restrictive dollars, the total amount of each fund, and reporting requirements and timelines.  
Strategy: The planning for this spending will be initiated with the development of the annual budget. As information is released from the State and Federal governments, these plans will be updated and communicated to the Board and stakeholders.  
Strategy: The LCAP will steer budget development and fund priorities based on student learning outcome goals.
- 1.4 Objective: The Foundation Board will raise funds to support the needs of LCER schools and programs.  
Strategy: The Foundation will continue to host the annual gala each spring with the proceeds allocated 50/50 toward each schools' capital campaigns.

Strategy: Foundation Board will host an additional event each fall that will cultivate our donors and raise additional funds.

Strategy: Foundation Board members will work to cultivate donors throughout our communities by attending local events and promoting the Lewis Center.

## **Facilities**

### **Goal 2: Develop and maintain facilities to meet the TK-12 needs at both campuses.**

2.1 Objective: Complete NSLA TK-12 and Head Start campus in Winter/Spring 2021.

Strategy: Finalize the settlement and new lease agreement with County and City.

Strategy: Continue to work with school development and finance teams to facilitate the construction and bond process.

Strategy: Secure the best option for financing of the construction to ensure long-term sustainability and feasibility for NSLA.

2.2 Objective: Create a deferred maintenance schedule to properly identify and address needs of aging equipment, building and infrastructure.

Strategy: Hold monthly meetings with Director of Finance, Facilities Manager, Principals and CEO to evaluate needs and monitor progress.

Strategy: Create annual staff and student surveys regarding maintenance and campus condition to guide planning and ensure safety.

Strategy: Create contingency plans for major system malfunctions in order not to interrupt instructional time.

2.3 Objective: Monitor technological systems to protect against external and internal security threats.

Strategy: Continue to modernize systems across campuses including: cameras, lighting, and alarms with law enforcement access as an important consideration.

Strategy: Continue to utilize e-rate funds to modernize the current system.

2.4 Objective: Utilize the refinancing of the AAE Bonds to address capital campaign needs (i.e. Multipurpose Room, secondary science labs, additional athletic and P.E. fields, special education, parking lot rehabilitation, etc.).

Strategy: The Board and staff will research the best financing options to provide for continued stability and long-term planning.

Strategy: The staff will facilitate stakeholder input to create a prioritized facility plan for AAE that will drive the decisions for how best to utilize the additional funds.

## Student Success

**Goal 3: Strengthen the academic programs at both schools resulting in increased student mastery while preparing every student for post-secondary success in the global society.**

3.1 Objective: Both schools will demonstrate continued increases in student mastery in the area of Mathematics as reported on the California School Dashboard.

Strategy: Both schools will support the implementation of the adopted Math curricula through ongoing professional development and training.

Strategy: Both schools will increase STEAM offerings across grade levels to reinforce and support cross-curricular application of mathematical standards and concepts.

Strategy: AAE will offer fee reductions/waivers for SAT/ACT/AP preparation classes and tests to increase student participation and passing rates.

3.2 Objective: In order to decrease referrals for counseling and behavior incidents, both schools are implementing curricula at the elementary, middle and high school to support Social Emotional Learning (SEL). The collective outcomes of these strategies are to: enhance the ability of students to self-regulate, strengthen relationships amongst students and staff, and empower teachers to support SEL needs in the classroom.

Strategy: Both schools have adopted the Positive Prevention Plus curriculum in alignment with the California Healthy Youth Act AB329. This will be taught at the seventh and ninth grade levels.

Strategy: Both schools are piloting the Stanford Harmony curriculum at the elementary level. Stanford Harmony is a social emotional learning program for Pre-K-6 grade students designed to foster communication, connection, and community both in and outside the classroom, and develop boys and girls into compassionate and caring adults.

Strategy: NSLA has adopted the Habitudes curriculum for middle school. The Habitudes curriculum helps to instill valuable life skills into middle and high school students and prepares them to be authentic leaders.

3.3 Objective: Both schools will develop a more robust STEAM strand that builds upon itself in grades TK-12.

Strategy: AAE purchased a new classroom set of laptops to support the HS Computer Science courses. There will be additional efforts to increase enrollment in these classes.

Strategy: Both schools will increase student involvement in space science and aviation learning opportunities (i.e.: GAVRT, NASA's BEST, Space Science Electives, NASA Public Talks, AVCI STEM Nights and field trips, AFJROTC, AEX/Civil Air Patrol, community events and STEM camps).

Strategy: Partner with community agencies to support real-world STEAM applications at the middle/high school levels.



Strategy: Support professional development for teachers in the areas of technology, Next Generation Science Standards, GAVRT, visual and performing arts, and science.  
Strategy: Both schools will increase offerings such as: coding, engineering, computer science, robotics, and makerspace.

3.4 Objective: Both schools will support the LCER mission of creating global citizens through academic and co-curricular offerings.

Strategy: Field and study trips that support this objective will be encouraged for both students and staff (i.e.: Chilean Exchange, Chinese Delegation Exchange, international field trips, cultural activities, etc.)

Strategy: Develop the World Language component of the NSLA High School Program and seek ways to share courses between the two high schools.

Strategy: Seek community and governmental partners to provide real-world opportunities for global learning to students (i.e.: internships, field trips, collaborative projects, etc.)

## **Staffing**

### **Goal 4: Recruit, develop and retain a highly qualified and diversified staff.**

4.1 Objective: Evaluate ongoing and new recruitment efforts to ensure that all positions are filled with highly-qualified and diversified staff.

Strategy: Attend teacher recruitment job fairs specific to San Bernardino County.

Strategy: Recruit job seekers on EdJoin (certificated and classified) and various outside online job platforms and local newspapers (classified).

Strategy: Increase and leverage community involvement (i.e.: chamber memberships, economic development forums, community alliances, community cultural organizations, etc.) to elevate LCER's reputation across our communities and recruit diverse applicants for open positions.

4.2 Objective: Develop a comprehensive succession plan for all key positions.

Strategy: Under the direction of a board-appointed task force, research and draft a succession plan for the CEO.

Strategy: Under the direction of the CEO, the Executive Team will also draft internal plans within their departments to develop staff for growth opportunities for internal promotion.

Strategy: Develop LCER board and Lewis Center Foundation Board succession plans.

4.3 Objective: Invest in professional development for classified and certificated staff and board members.

Strategy: Utilize categorical and general funding to support teacher professional development that is aligned with student learning goals as stated in the LCAP.

Strategy: Support embedded and ongoing professional development in alignment with the adopted Math and Science curriculum.

Strategy: Develop management and classified capacity through internal and external trainings.

4.4 Objective: Create a highly attractive environment for staff which increases and/or maintains staff retention rates LCER-wide.

Strategy: Continue to seek ways to increase compensation for staff using salary comparisons as a guide for priorities.

Strategy: Provide opportunities for shared decision making through PLCs, surveys, ALTs, task forces, cross-organization collaboration, etc.

Strategy: Maximize the flexibility afforded to us as a charter in all areas.

## **Organizational Effectiveness**

**Goal 5: The Lewis Center for Educational Research will communicate and operate under a common vision, mission, goals and objectives.**

5.1 Objective: The Board of Directors and Executive Team will continue to participate in annual strategic planning. Progress toward goals will be reported monthly via the CEO Board Report.

Strategy: Align the CEO's evaluation process to the progress toward the mission, vision and goals adopted in the LCER Strategic Plan.

Strategy: Develop a board evaluation process to support the LCER Strategic Plan.

5.2 Objective: Board and Executive Team will actively communicate LCER's mission to the stakeholders and communities that we serve.

Strategy: Each Executive Director will be engaged in key organizations within their area of expertise and will continue to seek opportunities to lead and present.

Strategy: Under the direction of the LCER PR and Marketing Coordinator, marketing and branding will increase through social media, print media, conference and community participation, and recruitment efforts as measured by monthly staff board reports.

Strategy: Communicate with parents of the school sites through School Site Councils, Parents and Pastries, Parent/Teacher Groups, English Learner Advisory Councils, Principal's Cabinets, school events, and ongoing communication to ensure that our reputation is strong (with the goal to measure increased attendance at these events or committees).

Strategy: Executive Team and LCER Support Staff will maintain an active presence on both campuses.

5.3 Objective: Increase communication with stakeholders regarding progress toward mission, vision, and goals.

Strategy: Give progress updates at All Staff Meetings (August, December, June).

Strategy: Hold open financial updates around Interim Reporting timeframes or any major financial developments with staff to ensure transparency in LCER finances.

Strategy: Hold annual LCAP stakeholder meetings to report our progress toward goals.

Strategy: Increase attendance at board meetings through staff calendar invites, social media posts, and staff and student presentations and recognitions.

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**APPENDIX A**

**Historical Background of Strategic Plan**

The Lewis Center for Educational Research (LCER) is in a transitional period in its life cycle. With the retirement of our charismatic, visionary founder, the Board of Directors and Executive Team determined that we are facing a challenging future. To plan for that future, and to assure that it is the future we want it to be, we decided to engage in strategic planning. Board members and senior administrators became the planning team. This team convened several times over a two-month period in the spring of 2016, and spent many hours examining issues and concerns, and to share thoughts, ideas and suggestions on the future of LCER and its two charter schools. The results of those sessions are contained in this strategic plan.

**Process**

In order to address immediate concerns, the planning team first held a five hour "strategic issues" session. Administrative staff presented update reports on issues identified at an earlier board retreat held in November, 2015. Staff asked for and received direction from the Board on most of these issues which are presented in Appendix B.

The strategic issues session was followed by a full day planning meeting. During the morning session, discussion continued on issues where, due to time constraints at the earlier meeting, direction was still desired by staff. The results of these discussions are presented in Appendix C. Meeting minutes from 2017 are presented in Appendix D, meeting minutes from 2018 are presented in Appendix D and meeting minutes from 2019 are presented in Appendix F.

The afternoon session was devoted to reviewing and modifying the LCER mission statement, developing a set of values, and completing a S.W.O.T. analysis. Statements to accompany the values were developed by a small volunteer task force who met a few days later. Those values and value statements are included in the body of the plan. The 2016 S.W.O.T. analysis is presented in Appendix G, the 2017 S.W.O.T. analysis is presented in Appendix H, the 2018 S.W.O.T. analysis is presented in Appendix I and the 2019 S.W.O.T. analysis is presented in Appendix J.

The third session was devoted to determining any remaining critical issues and developing strategic goals and objectives. Additionally, strategies for strategic management were discussed and responsibilities for developing and implementing action plans were assigned.

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**APPENDIX B**

**Summary of Issues Discussed at February 25, 2016 Session  
(More Detail in Board Minutes)**

<b><u>Issues</u></b>	<b><u>Board's Concerns/Direction</u></b>
<u>Finances</u>	<ol style="list-style-type: none"><li>1. Policies and procedures need revision.</li><li>2. Some new policies and procedures need to be written.</li><li>3. Restructuring of debt need to be completed.</li><li>4. Tetra contract should be reviewed by legal counsel.</li><li>5. Concern that staff is not on top of these issues</li></ol>
<u>Staffing</u>	<ol style="list-style-type: none"><li>1. Grant writer position/person needs review.</li><li>2. Do we need a PR/Community relations position? Can we afford it?</li><li>3. Consulting contracts/position/expenditures need review.</li><li>4. Concern that staff is not on top of these issues</li></ol>
<u>Parity</u>	<ol style="list-style-type: none"><li>1. What is the cost of offering step or stipend for hard-to-fill positions such as BCLAD. Can we afford it? Stacy was given direction to cost out this option.</li><li>2. Stacy was also given direction to cost out other options such as help with repaying student loans, improving leave and benefit package, absorbing health care cost increases, adding additional years to the salary schedule. Stacy to report costs with recommendations to Finance Committee. Finance Committee to bring recommendations to the full Board.</li><li>3. Recruiting teachers is difficult due to salary schedule. Board member suggestion: what if we offered to pay for the last year or two of college in exchange for a multi-year commitment to LCER?</li></ol>
<u>Revenues opportunities</u>	<ol style="list-style-type: none"><li>1. Board directed staff to pursue offering one TK class at each school starting fall 2016.</li><li>2. Board agreed with staff recommendation to try to fill grade levels, thus increasing ADA.</li><li>3. Staff floated several other ideas for increasing revenues. The three that the Board seemed most interested in were cell tower, selling surplus land, and fundraising.</li></ol>

Norton

1. Difficulty in filling upper grades because students must be bilingual and biliterate. Enrollment in upper grades will increase as students in lower grades move up.
2. Low test scores – student must answer questions by writing in English – no exceptions for English learners. No similar schools to use for comparison in California.  
This is a concern for charter renewal.
3. Lease – needs to be renegotiated. Who is responsible? Current lease requires LCER to provide facilities for Head Start – current requirement for a new parking lot.
4. Relocation/expansion – CSUSB not an option. Could expand on current property. Could apply for Prop 39 and/or SB 740 funds.  
Who's responsible?

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**APPENDIX C**

**Summary of Issues Discussed at February 29, 2016 Session  
(More Detail in Board Minutes)**

<u>Issue</u>	<u>Board's Concerns/Direction</u>
<u>Use of Thunderbird</u>	<p>1. Board straw vote provided direction to Gordon to pursue after-school, joint program with AVUSD; keep Board informed of progress.</p> <p>2. Board expressed desire to explore option of selling TBC building, but only with consideration for improvements made by LCER. Can we sell if we don't own the land? Do we need AVUSD's approval to sell? Who's responsible for doing this?</p>
<u>Norton</u>	<p>1. Board decided to have charter renewed as a TK-12 school; strengthen TK-8 program while high school being developed; explore alternative models for high school; to be implemented by next charter renewal; bring plan and timeline for implementation with cost analysis for both the high school and the planning effort to the Board; put timeline in the current charter renewal application; should someone be hired to lead the planning effort?</p> <p>2. Board agreed NSAA's name needs to be changed to reflect what is actually happening. The School Board committee, staff and parents should discuss and recommend name change to the full Board. Some suggested name changes included:</p> <ul style="list-style-type: none"><li>• Norton Language and Science Academy</li><li>• Norton Science and Language Academy</li><li>• Norton Academy</li><li>• Norton Academy for Academic Excellence</li></ul> <p>3. Should Norton have an English Only strand for 5-8? NSAA School Board committee and staff should bring recommendation to the full Board along with implementation plan and cost analysis if recommendation is "yes."</p>

Organizational issues

Should LCER change its name?

Board consensus was to keep the LCER name. Some of the reasons given were:

- Too costly to rebrand
- The community knows us as LCER; to change the name would confuse the community.
- The name gives us a priority (research), and we should develop more university partnerships to do research. (Who is responsible?)
- The name reflects our desire to try new things, innovate

Should there be more emphasis on fundraising?

Board consensus was “yes,” and to explore the option of pulling the Fundraising Committee from the Board and make it a separate fundraising foundation. Who will be responsible for this?



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**APPENDIX D**

**Special Meeting of the  
Lewis Center for Educational Research Board of Directors**

**Minutes  
September 11, 2017**

1.0 Call to Order

Chairman Bud Biggs called the meeting to order at 12:10 .m.

2.0 Roll Call

LCER Board Members Bud Biggs, Buck Goodspeed, Kirt Mahlum, Kevin Porter, Russell Stringham, Peter Torres, Marcia Vargas and Rick Wolf were present.

LCER Board Members Duberly Beck, Andy Jaramillo, Jose Palafox and Regina Weatherspoon-Bell were absent.

Staff members Valli Andreasen, Fausto Barragan, Ryan Dorcey, Teresa Dowd, Jim Foley, Wes Kanawyer, Lisa Lamb, Stacy Newman, Toni Preciado, Jim Quinn and Paul Rosell were also present.

3.0 Public Comments: None

4.0 Discussion/Action Items on Strategic Planning

.01 Consultant Pat Caldwell Reviewed/Updated LCER Strategic Plan Mission, Vision and Values with the Board and staff.

- Mission: It was discussed and confirmed that we are using data driven and research proven practices at both schools, and the LCER is improving in this area. It was confirmed that we are innovative by using technology at both schools and seek opportunities that prepare our students. It was suggested to interview and get feedback on how we're doing from our graduates (college, trade, business, military), and from our teachers and parents as well. We feel the need to be innovative moving forward - being innovative is what makes us different. We need to balance innovation with legislation/day to day duties. Do we have a

safe and inclusive culture? At NSLA the location, facilities and traffic flow are unsafe, and traffic will increase with the additional warehouses. Upset parents are unsafe to the campus. Lisa noted that surveys show a positive response for safe campuses. Buck asked if safety should be moved up within the mission statement. At AAE outdoor facilities pose a safety hazard. Students feel safe per the student advisory council. It was asked if there is there diversity on the AAE student advisory council and if AAE has a real or perceived issue with diversity. We need to seek advice on how to increase diversity within the boundaries of a lottery enrollment. The Board needs diversity also.

- Vision: Are we exceeding needs? We are not “meeting” CAASP, let alone exceeding. What we're doing needs to be known. We need to tell our story and we need someone to tell it. Paul discussed how special ed students are included. We need to come up with a definition of “a focus on science”. We are leading the way in NGSS. Kevin noted we need more science emphasis at both schools. GAVRT doesn't touch our students. A dual immersion high school at NSLA was discussed. Is it a reality fiscally? Marcia feels it is possible. It should definitely be a language focus high school - teaching through the language. Paul asked if the goal is innovation or to prepare students for a global society. We will keep dual immersion high school in the vision. The Board can modify the strategic plan anytime. Marcia noted the need to develop a task force to decide secondary plans for NSLA. Community engagement can be better.
- Values: Last year our focus wasn't innovation. We can now move forward with it as a focus. Kevin felt things were handled in an excellent manner and we have had tremendous collaboration and growth. Lisa thanked Pat and Board for staying focused on plan over the last year.

.02 Consultant Pat Caldwell reviewed/updated LCER Strategic Plan strengths, weaknesses, opportunities and threats with Board and staff, and will incorporate them in the updated LCER Strategic Plan.

.03 Consultant Pat Caldwell reviewed/updated LCER Strategic Plan Existing Goals and Objectives. The goals are our highest priorities. Lisa Lamb provided an update on accomplishments towards the current goals.

Goal 1: “Improve the financial condition of the LCER, including key provisions for sustainability” - we are still working on this goal. Under Objective 1.2 – the budget needs to be more understandable for Board and staff. The date to accomplish this by was updated to December 2017. Kevin would like us to be proactive in looking at figures. Under Objective 1.3 - a 3% reserve is standard. The objective to have no less than two months of total payroll and costs in reserves is over and above the 3%.

Goal 2: “Renew Norton’s charter in December 2016 and continually strengthen the academic program” – the charter was renewed and we are in lease negotiations with the City and County of San Bernardino regarding the campus. We need to determine our final option and our budget. Lisa has been able to tell NSLA’s story to many during this process.

Goal 3: “The Lewis Center for Educational Research will be unified under a common vision, mission, goals and objectives” – we are still working on trust and transparency and will review the objectives.

.04 Consultant Pat Caldwell lead a discussion on identifying any new critical issues and goals and objectives. Lisa Lamb presented information on a new goal of academics that will be included in the updated LCER Strategic Plan.

Kirt asked that more information on what’s being done in math, robotics, etc. be included in the Board packets/meetings. Russ asked about coding and measureable results.

Lisa and Pat will make the revisions to the LCER Strategic Plan, and the Exec Team will review the objectives, and then bring the revised plan to the LCER Board for approval.

## 5.0 Adjournment

Chairman Bud Biggs adjourned the meeting at 3:30 p.m.

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**APPENDIX E**

**Special Meeting of the  
Lewis Center for Educational Research Board of Directors**

**Minutes  
October 19, 2018**

1. **CALL TO ORDER:** Chairman Kevin Porter called the meeting to order at 8:35 a.m.
2. **ROLL CALL:** LCER Board Members Duberly Beck, Kirt Mahlum (arrived at 9:00 a.m.), Jim Morris, Omari Onyango (left at 2:30 p.m.), Kevin Porter, David Rib and Marcia Vargas were in attendance.

LCER Board Members Sharon Page and Rick Wolf were absent.

Staff members Valli Andreasen, Fausto Barragan, Ryan Dorcey, Teresa Dowd, David Gruber, Lisa Lamb and Stacy Newman and Paul Rosell were also in attendance.

Pat Caldwell facilitated the Strategic Planning.

3. **PUBLIC COMMENTS:** None
4. **DISCUSSION/ACTION ITEMS ON STRATEGIC PLANNING:**
  - .01 LCER Organizational Structure/Board and Staff Roles:** Pat Caldwell led an activity on the structure of the LCER. David Gruber also presented information on how LCER is funded.
  - .02 Review/Update LCER Strategic Plan S.W.O.T. Analysis:** Strengths, weaknesses, opportunities and threats were identified.
  - .03 Review/Update LCER Strategic Plan Existing Goals:** Pat Caldwell instructed the Board that strategic planning is visionary. The Board sets goals, which give direction for staff and the organization. Staff then develops objectives and strategies for how to implement the goals. Strategies can change throughout the year. Existing goals were reworded to the following:
    - Goal 1 – Build the financial capacity of the LCER, including key provisions for sustainability.
    - Goal 2 – Develop and maintain facilities to meet the TK-12 needs at both campuses.

Goal 3 - Strengthen the academic programs at both schools resulting in increased student mastery.

Goal 5 – (formerly Goal 4) The Lewis Center for Educational Research will communicate and operate under a common vision, mission, goals and objectives.

**.04 Identify any New Critical Issues and Goals:** The top 3 critical issues identified were: Successful NSLA expansion, financial stability/capacity, and maintain a high quality staff.

The following new goal was numbered as Goal 4 – Recruit, develop and retain a highly qualified staff.

The Executive Team will develop new objectives and strategies for implementing the goals, and the Strategic Plan will be revised and brought back to the Board for approval in February.

5. **ADJOURNMENT:** Chairman Kevin Porter adjourned the meeting at 3:30 p.m.

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**APPENDIX F**

**Special Meeting of the  
Lewis Center for Educational Research Board of Directors**

**Minutes  
August 9, 2019**

1. **CALL TO ORDER:** Chairman Duberly Beck called the meeting to order at 8:25 a.m.
2. **ROLL CALL:** LCER Board Members Duberly Beck, Pat Caldwell, Jim Morris, Sharon Page, and Jessica Rodriguez (left at 1:00 pm.), Marcia Vargas and Rick Wolf were in attendance.

LCER Board Members David Rib and Omari Onyango were absent.

Staff members Valli Andreasen, Fausto Barragan, Matthew Cabe, Marcelo Congo, Ryan Dorcey, Teresa Dowd, David Gruber, Lisa Lamb and Stacy Newman were also in attendance.

Heather Kinney attended the afternoon session on behalf of SBCSS.

3. **PUBLIC COMMENTS:** None

4. **DISCUSSION/ACTION ITEMS:**

.01 Review and Update LCER Mission and Vision – the LCER Board stated they would like to be more informed verbally about data driven results. They would like to add Global Society into the objectives. The LCER Board and LCER staff divided into 4 groups to work on the mission and vision, and then had a discussion as a whole. There was a discussion whether “student success” or “school and programs” should be first in the mission statement. The new mission statement developed for approval within the updated Strategic Plan is: “To ensure student success in a global society through data driven and research based schools and programs that are safe, innovative and culturally inclusive.” A committee was developed to work on the vision – Lisa Lamb, Sharon Page, Matt Cabe and Fausto Barragan.

They will bring the vision forward for approval by the LCER Board.  
Information from the groups will be shared with the committee.

.02 Complete S.W.O.T. Analysis for 2019-20 School Year -

Strengths - NASA, passion, leadership, longevity, culture, safe, language, model-exemplary, campuses-facilities, student services, broadly supportive, different expectations, well-known, community, partnerships, diversity, committed board, parents, staff & faculty, Special Ed, inclusive, unique programs, STEAM, extra-curricular, diverse community, best practices, data driven, research based, PLCs, camaraderie, big wait list, curiosity, relationship with authorizers, relationships with elected officials, finances, stability, reputation, WASC accreditation, dual language, award winning programs, well established, back office structure, innovation, partnerships world wide, PR person, Lewis Center Foundation

Weaknesses - Internal marketing, student participation in GAVRT and space science classes, visibility, external marketing, local outreach needs to be reimagined, nobody knows our current story, not visionary, two schools working together to share best practices - still feels like forced play, branding, fundraising, energy of science teachers - no passion, competition for teachers, science isn't a fundamental part of our culture, salaries for teachers and administration, lack of science labs and resources, lack of team development in science programs, facilities a challenge, budgeting management of facilities, management of facilities - not enough special types of classrooms, maintenance and upkeep of grounds, not enough space, student recruitment at NSLA and AAE HS, grading policy no D, rigor, lack of fiscal and staffing to innovate, need more thinking outside of the box, challenge to meet the basics while enhancing ability to innovate, sports facilities at NSLA, stipends for sports staff, lack of school spirit, not enough onsite facilities for sports

Opportunities - NASA is cool right now, grant \$ for languages/STEM/low economic populations, college partnerships, optical telescope at CSUSB, parent connection, partnership opportunities, fundraising opportunities, artificial intelligence, leverage partnerships with business community, industry internships, cyber security program at CSUSB, free camp for ms girls, informal education partnerships (i.e. Discovery Cube), expand global exchanges, alumni involvement, local elected officials

Threats - political, California, litigious society, legislative, unfunded mandates, rules, compliance, CTA, other district compensation, other dual immersion programs, magnet schools, anti-immigration, tariffs, teacher shortage, city of SB disfunction, special ed law and litigation, vaping, social media, social-emotional trauma, mental health, cost of providing services, school safety, hard to keep up with changes - esp in technology, cost of doing it, home school charters/other educational opportunities, screen

time, cell phones, lack of human interaction, irrational parents, teachers who come with bad habits, cyber hacking

.03 Review Goals and Progress Made in 2018-2019 School Year – Lisa Lamb handed out progress on the goals and reviewed the current goals which she feels are still relevant.

.04 Finance Presentation – John Phan, Urban Futures Incorporated - Jim Morris recused himself for this presentation. John Phan reported that we interviewed and hired a new development team and the reasons for the change. He talked about the structure options for financing including concepts and terms. A tax exempt bond is the number one way for charters to finance. For the underwriter selection, two firms were chosen. Cross collateralization will not be required. We will need to establish two special purpose entities (LLC). This also allows an opportunity to refinance current bonds and separate additional financing to build AAE a multipurpose room as well as the NSLA new campus. The LCER Board would like a breakdown of how AAE can afford a higher loan amount. John will provide this.

.05 Norton Campus Expansion Development – Larry Rieder, Charter School Property Solutions

Larry Rieder presented on the Norton campus expansion development and provided an entitlement approval schedule. Final approval is expected February 15. Financing doesn't close until that process is completed. He also showed a new site plan that was reviewed.

.06 Critical Issues were not discussed as the current goals are still relevant.

.07 Updated and Revise LCER Goals as Needed - Goal 3 was updated to be titled "Student Success" instead of "Academics" to reflect the new mission statement. "Diversity" will be added to Goal 4. New objectives will be created by the Exec Team based on today's conversations.

5. **ADJOURNMENT:** Chairman Duberly Beck adjourned the meeting at 3:53 p.m.



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**APPENDIX G**

**S.W.O.T. ANALYSIS (2016)**

At the second planning session, planning team members engaged in a “mini” environmental analysis by brainstorming the organization’s strengths and weaknesses (internal) and opportunities and threats (external). Their determination of strengths that might be enhanced and weaknesses that might be corrected, along with opportunities and threats presented by the external environment, helped guide them when deciding what critical issues must be addressed. Their brainstormed S.W.O.T. follows:

**Strengths**

- Highly dedicated staff
- Parent support
- Engaged students
- Motivated Board
- Outside the box thinking
- Culture
- Safe environment
- Small class sizes
- Caring staff
- Private school environment
- Less bureaucracy
- Passionate about learning
- Tight community feel
- Non-union
- Successful K-12 program
- Technology rich
- Partnerships
- Enrichment programs
- Well-balanced education
- Parents that care
- Facilities
- Locations
- Relationships with chartering agencies
- Relationships with other agencies
- Pride
- GAVRT, Bridge, Local Outreach, HiDas,
- Successful alumni

- AFROTC
- Political connections
- Media connections
- Bi-literacy
- Chinese partnerships
- Board connections

### **Weaknesses**

- Lack of planning
- GAVRT
- Lack of transparency
- Communication
- Facilities & Norton
- Lack of marketing
- Detailed budget planning
- No football team
- Weak in developing new partnerships
- Teacher turnover at NSAA
- Relationships between board & exec team
- Student attrition
- Fund development
- Low salaries
- No multi-year budget
- Lack of capital investment
- Current policies
- Lack of leadership transition planning
- Lack of stakeholder involvement
- Tracking alumni
- NSAA treated like stepchild
- Lack of proactive recruitment of teachers
- Lack of student recruitment
- Broken promises
- Weak Board
- Uninformed Board
- Lack of Board participation at Festival of Arts at AAE

### **Opportunities**

- Business partnerships
- University partnerships
- Developing real estate at AAE & NSAA
- STEM partnerships
- Fund development
- Relationship with alliance for education
- Internships

- Political relationships
- Alumni
- Low interest rates, rising economy
- Partnership with community service agencies
- 740 program & Prop 39

### **Threats**

- Other salary schedules elsewhere
- Competing dual immersion programs
- Shortage of teachers
- Uncertain revenues
- Common core vs. the unknown
- County/city involvement in our lease
- Anti-charter movement
- Unionization
- Teacher training institutions have bad impression of charter schools
- More legislation coming
- Needing more legal advice due to regulations
- Security
- LCAPS more regulated
- Charter renewals
- Desert Trails controversy

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**APPENDIX H**

**S.W.O.T. ANALYSIS (2017)**

**Strengths**

- After School Program
- At will
- Board of Directors
- Branding
- Chinese partnerships
- Communication
- Culture
- Engaged students
- Enrichment opportunities
- Jim Foley
- Leadership
- Low staff attrition
- Non-union
- Parent support
- Partnerships
- Political connections
- Potential
- Private school environment
- Relationships
- Safe environment
- Salary flexibility
- Sports
- Strong administration
- Strong relationships with authorizers
- Teachers
- Technology rich
- Transparency

**Weaknesses**

- Data analysis
- Doing business in California
- Gathering data from stakeholders
- GAVRT in classrooms
- Facilities
- Financial responsibilities
- Financial resources

- Financial understanding
- Lack of marketing
- Low salaries
- Online presence – social media
- Policy revisions
- Standard operating procedures for support departments
- Tracking alumni
- Visibility

### **Opportunities**

- Advocacy
- Alumni
- Conference presentations
- Corporate partnerships
- Educational association connections
- Environmental land trust
- Friendraising
- Funding opportunities
- Partnerships
- Political connections
- Speaker's bureau – former board members
- STEM partnerships
- Student internships
- University and community college partnerships

### **Threats**

- Lease with SB County/City
- Legislation
- Natural disasters
- Other salary schedules elsewhere
- Security – cyber and campus
- Shortage of teachers and subs
- Unionization
- Well-funded anti-charter movement

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**APPENDIX I**

**S.W.O.T. ANALYSIS (2018)**

**Strengths**

- Board
- People
- Supportive arents
- Great reputation
- Innovation
- Diversity
- Partnerships
- GAVRT
- Relationship with authorizers
- Longevity
- History
- Wait list
- Strong & unique academic programs
- Dual immersion
- Fiscal stability
- Fiscal process
- Technology
- Location of schools
- Reach – global, national
- Discussing, not attacking
- Dedication
- Transparency of budget process
- Strategic Planning
- Bylaws revisions
- General morale
- More trust
- Leadership
- Communication
- Students first
- Retention
- High quality staff
- Retention of students
- Professional development
- Flexibility
- Utilize best practices
- Integrity

- Loyalty
- Respect
- Exemplary Systems
- Safe schools
- School uniforms
- Small class sizes
- TK-12 schools
- Nurturing Culture
- Fiduciary oversight
- Blank slate for Norton facilities
- Risk tolerance
- Risk takers
- Small schools
- Small CMO
- High level of volunteers
- Parents Involved
- Legacy

### **Weaknesses**

- Financial uncertainty
- Growth – how to successfully grow Norton
- PR/marketing
- Fund development
- Compensation levels
- Communication
- Facility planning
- Facility maintenance
- Board knowledge of programs
- Goofy lease terms
- Historical decisions/mistakes
- Legacy
- Updating policies
- STEM/STEAM at Norton
- Board visibility
- Exec team presence
- Perception of inequities between Norton and AAE
- Succession plan
- Budget inflexibility
- Support for new employees
- High supervisor ratio
- Math test results
- Academic achievement at Norton and AAE
- Labs at both schools
- Complacency

- Lack of resources compared to non-charter public schools
- Lack of participation in activities for special needs students
- Special ed culture at Norton
- Geographical distance between schools
- Lack of understanding of the uniqueness of each school
- Challenge of writing IEPs for English speaking student in dual immersion program
- Lack of waiting list at Norton
- Stability/strength of middle school at Norton
- High school waiting list at AAE
- Lack of charitable giving
- LCER reputation and presence in Inland Empire
- Number of Board members from Inland Empire
- Small athletic program
- Overburdened leadership
- Lack of transitional planning

### **Opportunities**

- NGSS standards
- NASA partnership
- Informal education
- Address local or regional educational needs
- Attract students because of graduation rates and college going numbers
- Lack of other high performing charter schools
- Magnet focus to fill the void in world languages
- Build a high school with an end in mind
- Align classroom experience with unique extracurricular programs
- Can put interns into the classroom
- Stay ahead of next cutting edge trend
- Become role model for other dual language schools
- Tough challenge to always be out in front
- Become known as the leading charter schools
- Can gain more community support
- Growth at Norton
- Land trust
- University partnerships for staff recruitment and PD

### **Threats**

- Attack on charter schools
- Unions/unionization
- PERS/STRS
- Comparable salaries/compensation
- State funding for charter schools
- Anti-charter governor



- Economy
- Teacher shortage
- Competition for bilingual teachers
- Socio-economic status of demographics in region
- Growth of special ed needs
- Perception of bloated admin and fiscal mismanagement
- Declining prospective student population
- Technological demand of education in 21<sup>st</sup> century
- Litigation
- Security threats – cyber attack, terrorism, etc.
- Opposition to our program expansion
- AVUSD board election
- Increasing regulatory requirements
- No appeal rights with county authorizer
- Students overuse of technology/language skills dropping, etc., less interaction
- Diminishing social skills
- Ghost charters
- Substitute shortage

**Lewis Center for Educational Research  
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**APPENDIX J**

**S.W.O.T. ANALYSIS (2019)**

**Strengths**

- NASA
- Passion
- Leadership
- Longevity
- Culture
- Safe
- Language
- Model-exemplary
- Campuses-facilities
- Student services
- Broadly supportive
- Different expectations
- Well-known
- Community
- Partnerships
- Diversity
- Committed board, parents, staff & faculty
- Special Ed
- Inclusive
- Unique programs
- STEAM
- Extra-curriculars
- Diverse community
- Best practices
- Data driven
- Research based
- PLCs
- Camaraderie
- Big wait list
- Curiosity
- Relationship with authorizers
- Relationships with elected officials
- Finances

- Stability
- Reputation
- WASC accreditation
- Dual language
- Award winning programs
- Well established
- Back office structure
- Innovation
- Partnerships world wide
- PR person
- Lewis Center Foundation

### **Weaknesses**

- Internal marketing
- Student participation in GAVRT and space science classes
- Visibility
- External marketing
- Local outreach needs to be reimaged
- Nobody knows our current story
- Not visionary
- Two schools working together to share best practices - still feels like forced play
- Branding
- Fundraising
- Energy of science teachers - no passion
- Competition for teachers
- Science isn't a fundamental part of our culture
- Salaries for teachers and administration
- Lack of science labs and resources
- Lack of team development in science programs
- Facilities a challenge
- Budgeting management of facilities
- Management of facilities - not enough special types of classrooms
- Maintenance and upkeep of grounds
- Not enough space
- Student recruitment at NSLA and AAE HS
- Grading policy no Ds
- Rigor
- Lack of fiscal and staffing to innovate
- Need more thinking outside of the box
- Challenge to meet the basics while enhancing ability to innovate
- Sports facilities at NSLA

- Stipends for sports staff
- Lack of school spirit
- Not enough onsite facilities for sports

### **Opportunities**

NASA is cool right now  
 Grant \$ for languages/STEM/low economic populations  
 College partnerships  
 Optical telescope at CSUSB  
 Parent connections  
 Partnership opportunities  
 Fundraising opportunities  
 Artificial intelligence  
 Leverage partnerships with business community  
 Industry internships  
 Cyber security program at CSUSB  
 Free camp for ms girls  
 Informal education partnerships (i.e. Discovery Cube)  
 Expand global exchanges  
 Alumni involvement  
 Local elected officials

### **Threats**

Political  
 California  
 Litigious society  
 Legislation  
 Unfunded mandate  
 Rules  
 Compliance  
 CTA  
 Other district compensation  
 Other dual immersion programs  
 Magnet schools  
 Anti-immigration  
 Tariffs  
 Teacher shortage  
 City of SB disfunction  
 Special ed law and litigation  
 Vaping  
 Social media

Social-emotional trauma  
Mental health  
Cost of providing services  
School safety  
Hard to keep up with changes - esp in technology  
Cost of doing it  
Home school charters/other educational opportunities  
Screen time  
Cell phones  
Lack of human interaction  
Irrational parents  
Teachers who come with bad habits  
Cyber hacking