Strategic Plan
2012 – 2017

INTERNATIONAL SCHOOL OF MONTEREY

Table of Contents

Guiding Statements

ISM articulates the following guiding statements to ensure common purpose for all stakeholders who invest their time, treasure, talents, and selves in the organization; and shared expectations for all those who entrust their children's education to the school.

Vision

A world of understanding

Mission

Educate all children toward becoming conscientious, compassionate, and responsible citizens of the world.

Academic Commitments

Internationalism ▶ Inquiry ▶ Understanding ▶ Success

Motto

The world is our home. We will make it better.

Who We Are

A successful school created to…

- ▶ Bring worldclass international education to a public school setting.
- ▶ Integrate best practices, established standards, and an international curriculum.
- ▶ Maintain a multicultural environment that advances understanding of and respect for all.
- ▶ Promote strong partnerships among school, home, and community.

Outstanding teachers who…

- ▶ Foster the holistic growth of each student.
- ▶ Apply learning to the real world.
- ▶ Maintain high expectations in the classroom.
- ▶ Continue professional development.

Thriving students who…

- ▶ Think freely and believe in self.
- ▶ Develop personal potential.
- ▶ Respect everyone.
- ▶ Connect with the world.

Involved parents who…

- ▶ Maintain high expectations at home.
- ▶ Express enthusiasm for learning.
- ▶ Participate in each child's learning every day.
- ▶ Support the school.

Strategic Commitments & Outcomes

To ensure that we sail a steady course into the future, ISM has identified four *strategic commitments*—broad goals indicating what the *ISM Community* commits to achieve over the long term to ensure that the *mission* gets executed in pursuit of the *vision*. Then, for each commitment, we articulate *strategic outcomes*—specific targeted results that, taken together, define the parameters of each *commitment*. We state the outcomes as present tense truths, because we aspire to have them become exactly that as we improve over the years.

While the various strategic planning teams do revise the commitments and outcomes as part of each annual update of this plan, the changes typically are few and mostly editorial in nature. This reflects the fact that these commitments and outcomes serve as anchors that keep ISM from shifting with the wind.

Commitment 1. Comprehensive, International Educational Program

ISM commits to delivering a comprehensive, international educational program— characterized by highly effective teaching and learning—that produces students who are conscientious, compassionate, and responsible citizens of the world; who are confident, free-thinking, motivated, multilingual, and ethical individuals; and who see multiple perspectives and have lifelong learning habits.

Outcome 1.1.   ISM fosters internationalism throughout the curriculum.

Outcome 1.2.   ISM integrates the IB Learner Profile into the curriculum.

Outcome 1.3.   The ISM curriculum incorporates current or future (i.e. Common Core) state standards.

Outcome 1.4.   The ISM educational program includes regular, quality instruction in the arts, English language arts, math, physical education, science, second/foreign language, and social studies, with the IB Learner Profile and technology instruction integrated across all subjects.

Outcome 1.5.   The ISM curriculum works cohesively both within and across grade levels.

Outcome 1.6.   ISM achieves best practices through inquiry-driven instruction and focus on understanding.

Outcome 1.7.   Teachers differentiate instruction to meet the individual needs of students.

Outcome 1.8.   ISM articulates and effectively implements a comprehensive assessment policy.

Outcome 1.9.   The educational program includes cocurricular and extracurricular activities that fit with the school's identity.

Commitment 2: Efficient Development and Management of Resources

ISM commits to achieving efficient development and management of its fiscal, physical, and human resources.

Outcome 2.1.   ISM is financially solvent and follows a sustainable budget model.

Outcome 2.2.   ISM clearly articulates fundraising strategies and programs, including ISM Foundation, grant writing, matching funds, community collaborations, and direct donations.

Outcome 2.3.   ISM has the instructional books, materials, supplies, and technologies necessary to achieve adopted curriculum goals.

Outcome 2.4.   ISM has appropriate facilities for instruction and school management.

Outcome 2.5.   ISM employs diverse and talented professionals who fulfill the schools operational and curriculum goals.

Outcome 2.6.   ISM facilitates ongoing evaluations relative to articulated job descriptions.

Outcome 2.7.   ISM augments its resources by collaborating with community partners.

Outcome 2.8.   ISM teachers receive the planning and professional development opportunities necessary to deliver the IB Primary Years Programme and Middle Years Programme.

Commitment 3: Clear Governance and Operations Structures

ISM commits to clear and effective governance and efficient operations structures.

Outcome 3.1. ISM reviews and maintains practical, usable policies and procedures that comply with the California Education Code and other applicable requirements, including those for:

- ▶ The Board of Trustees
- ▶ Charter development, renewal, and monitoring
- ▶ Student and staff conduct and discipline
- ▶ Safety and crisis management
- ▶ Strategic planning
- ▶ Student support services

Outcome 3.2. ISM has an organizational structure with clearly defined roles and responsibilities within an articulated chain of command.

Outcome 3.3. ISM has efficient and compliant data management processes.

Commitment 4: Exemplary Communications and Relations

ISM commits to maintaining exemplary communications and relations within the ISM Community, with its educational partners, and within the world beyond.

Outcome 4.1. ISM has an active community of families.

Outcome 4.2. The ISM administration, Board, Family Association, Foundation, and teachers effectively communicate with ISM students and families.

Outcome 4.3. ISM has effective working relationships with associated school districts and educational agencies.

Outcome 4.4. ISM communicates effectively with its surrounding community.

Outcome 4.5. ISM has meaningful links with other international schools and IB programmes.

Outcome 4.6. ISM has significant community partnerships that reflect and support school priorities, particularly internationalism.

Outcome 4.7. The ISM board and administration make their decision making transparent through effective communication to the ISM Community and other stakeholders.

2012-2013 Strategic Focus Areas

To unify the efforts of the many groups and individuals who make up the ISM community so that we achieve broad, significant improvement in key areas each year, ISM identifies two to four *strategic focus areas* annually. These arise from an analysis of the gaps between our target strategic outcomes, as articulated above, and our current reality as measured by the assessments listed below. Where we see big gaps or perceive the biggest positive impact of closing a gap, we consider setting a focus area.

Each year, various ISM groups and all individual staff members set goals that align with that year's focus areas. We ask every stakeholder to remember these areas and share them with others as "what we're focusing on right now" in our ongoing quest to become the best school and organization possible. We believe that the synergy of all ISM community members working both independently and collaboratively toward these common purposes will generate remarkable results.

Strategic Focus 1: Curriculum development and documentation

In our second year of candidacy for the Primary Years Programme (PYP) and Middle Years Programme (MYP) of the International Baccalaureate, we will continue our curriculum transition to meet all IB expectations. At the same time, we will address the transition from the current California State Standards to the Common Core Curriculum. By the end of the year, we plan to have our entire revised curriculum planned, taught, and reflected upon. We also plan to document the curriculum online, where all stakeholders, external evaluators, and interested parties can access it.

Key Stakeholder Groups

The following key stakeholder groups and the individuals who belong to them will likely set 2012-2013 goals related to this *strategic focus area*.

- ▶ Administrative Leadership Team (Director, Principal, Operations & HR Manager)
- ▶ Academic Leadership Team (Principal, IB Coordinator, Instructional Team Leaders)
- ▶ Teachers
- ▶ School Improvement Teams

Related Strategic Outcomes

Outcome 1.1. ISM fosters internationalism throughout the curriculum.

Outcome 1.2. ISM integrates the IB Learner Profile into the curriculum.

Outcome 1.3. The ISM curriculum incorporates current or future (i.e. Common Core) state standards.

Outcome 1.4. The ISM educational program includes regular, quality instruction in the arts, English language arts, math, physical education, science, second/foreign language, and social studies, with the IB Learner Profile and technology instruction integrated across all subjects.

Outcome 1.5. The ISM curriculum works cohesively both within and across grade levels.

Outcome 1.6. ISM achieves best practices through inquiry-driven instruction and focus on understanding.

Outcome 1.7. Teachers differentiate instruction to meet the individual needs of students.

Strategic Focus 2: Assessment and Reporting

To meet IB expectations, we will ensure that our academic assessment and reporting practices align with IB best practices and we will document these practices in a comprehensive assessment policy. At the same time, we will improve our assessment and reporting in all areas of our operations. Thus, we will work across the organization to put best assessment practices in place and to ensure that we effectively report the results of those assessments.

Key Stakeholder Groups

The following key stakeholder groups and the individuals who belong to them will likely set 2012-2013 goals related to this Strategic Spotlight.

- ▶ Board of Trustees
- ▶ Administrative Leadership Team (Director, Principal, Operations & HR Manager)
- ▶ Academic Leadership Team (Principal, IB Coordinator, Instructional Team Leaders)
- ▶ ISM Staff
- ▶ ISM Foundation
- ▶ ISM Family Connection

Related Strategic Outcomes

Outcome 1.7. Teachers differentiate instruction to meet the individual needs of students.

Outcome 1.8. ISM articulates and effectively implements a comprehensive assessment policy.

Outcome 2.6. ISM facilitates ongoing evaluations relative to articulated job descriptions.

Outcome 3.1. ISM reviews and maintains practical, usable policies and procedures that comply with the California Education Code and other applicable requirements, including those for: strategic planning.

Strategic Focus 3: Fundraising, philanthropy, and financial sustainability

As we continue to navigate past difficult financial times that have resulted in dramatic cuts to our primary funding stream of state revenues, we will take further steps to improve our overall fundraising, particularly working to secure the support of philanthropic individuals and foundations outside of the immediate ISM community while also growing a sense of philanthropy within the organization. In addition, we will seek other sources of funding and spending economies that will strengthen our financial sustainability.

Key Stakeholder Groups

The following key stakeholder groups and the individuals who belong to them will likely set 2012-2013 goals related to this Strategic Spotlight.

- ▶ Board of Trustees
- ▶ Administrative Leadership Team (Director, Principal, Operations & HR Manager)
- ▶ ISM Foundation
- ▶ ISM Families

Related Strategic Outcomes

Outcome 2.1. ISM is financially solvent and follows a sustainable budget model.

Outcome 2.2. ISM clearly articulates fundraising strategies and programs, including ISM Foundation, grant writing, matching funds, community collaborations, and direct donations.

Outcome 2.3. ISM has the instructional books, materials, supplies, and technologies necessary to achieve adopted curriculum goals.

Outcome 2.4. ISM has appropriate facilities for instruction and school management.

Outcome 2.7. ISM augments its resources by collaborating with community partners.

Outcome 3.3. ISM has efficient and compliant data management processes.

Outcome 4.1. ISM has an active community of families.

Outcome 4.6. ISM has significant community partnerships that reflect and support school priorities, particularly internationalism.

Assessment

To facilitate regular assessment of progress toward achieving the *strategic outcomes* and to identify the performance gaps that guide our selection of *strategic focus areas* each year, we articulate indicators, measures, metrics, and performance targets for each of the outcomes.

NOTE: While accreditation by the Council of International Schools and the Western Association of Schools and Colleges was discussed as a possible *strategic outcome* in itself, in the end, the planners felt that accreditation fit more appropriately as an *indicator* of success in achieving each of the school's strategic commitments. While we prioritized and earned initial accreditation in 2008, and work toward successful completion of followup reports and visits to maintain that accreditation, we do this knowing that the ongoing self-assessment and external review involved serves as an important measure and validation of our success in all strategic areas listed in this plan. Now that we have become a candidate school for International Baccalaureate programmes, the same applies to our goal of authorization by the IBO as an *IB World School*.

Indicator	Measure	Metric	Target
Commitment 1. Comprehensive, International Educational Program			
1.a. External validation	Program review by the Council of International Schools, Western Assoc. of Schools and Colleges, and International Baccalaureate Org.	Accreditation by both CIS and WASC	Ongoing
		Authorization by IBO	By 2013
Outcome 1.1. ISM fosters internationalism throughout the curriculum.			
1.1.a. Learning outcomes addressing internationalism or its included elements as established in ISM's *Standards-Based Definition of Internationalism*	Annual administrative audit of learning units	Number of outcomes addressing internationalism or its elements	One or more per unit
		Number of units at each grade level focusing on each element	One or more per element
	Annual administrative audit of SEM (Schoolwide Enrichment Model) plans	Number of learning outcomes addressing internationalism or its elements	One or more per plan
Outcome 1.2. ISM integrates the IB Learner Profile into the curriculum.			
1.2.a. Learning outcomes addressing IB Learner Profile traits	Annual administrative audit of learning units	Number of learning outcomes addressing character development and traits	All units include at least one
1.2.b. IB Learner Profile traits of eighth-graders	Annual eighth-grade end-of-year self-evaluation survey	Average rating for each desired trait	4.0 on a 5-point scale
	Annual eighth-grade end-of-year teacher survey	Average rating for each desired trait	4.0 on a 5-point scale
	Annual eighth-grade end-of-year parent survey	Average rating for each desired trait	4.0 on a 5-point scale
1.2.c. IB Learner Profile traits of alumni	Annual ninth-grade mid-year self-evaluation survey	Average rating for each desired trait	4.0 on a 5-point scale
	Annual ninth-grade mid-year teacher survey regarding all ISM students taught (i.e. one survey per teacher rather than one per graduate)	Average rating for each desired trait	4.0 on a 5-point scale
	Annual ninth-grade mid-year parent survey	Average rating for each desired trait	4.0 on a 5-point scale

Indicator	Measure	Metric	Target
Outcome 1.3. The ISM curriculum incorporates current or future (i.e. Common Core) state standards.			
1.3.a. State standards in articulated curriculum	Annual teacher confirmation during orientation week that the curriculum to be taught in that teacher's grade level or subject area incorporates all applicable state standards	Number of state standards not included in each subject	Zero
1.3.b. ISM student mastery of state standards	Annual California Standardized Testing (CST)	Percentage of students scoring Proficient or above	80 percent per tested subject at each grade level
		Percentage of students achieving the same or a higher level than the prior year	70 percent per tested subject at each grade level
Outcome 1.4. The ISM educational program includes regular, quality instruction in the arts, English language arts, math, physical education, science, second/foreign language, and social studies, with the IB Learner Profile and technology instruction integrated across all subjects.			
1.4.a. Instructional minutes provided by Highly Qualified teachers in each subject	Annual administrative review of class schedules	Scheduled annual minutes of instruction	7,800+ for ELA, social studies, math, and science
			6,500+ for second/foreign language
			1,300+ for art, drama, and music
			2,600+ for PE
	Annual start-of-year administrative audit of teacher certification	Percentage of teachers meeting HQ requirements	100 percent
1.4.b. Instructional quality	Annual teacher review process by principal	Percentage of teachers placed on professional improvement plans	<10 percent
1.4.c. Student performance	Subject matter assessments (benchmark and summative)	Percentage of student scores improving 20 percentage points from benchmark to summative	80 percent
Outcome 1.5. The ISM curriculum works cohesively both within and across grade levels.			
1.5.a. Published curriculum	Annual administrative review of published curriculum	Number of disconnects (e.g. similar assignments not combined, missing connections where connection potential obvious, etc.) among subjects at a grade level	Zero
		Number of disconnects (e.g. repeated unit topics, duplicate fieldtrips, missing progression) among grades for a subject	Zero
1.5.b. Teacher, parent/guardian, and student feedback	Annual end-of-year teacher, parent/guardian, and student surveys	Number of issues corroborated by three or more respondents	Zero

Indicator	Measure	Metric	Target
Outcome 1.6. ISM achieves best practices through inquiry-driven instruction and focus on understanding.			
1.6.a. Inquiry-based units	Annual administrative audit of learning units	Number of units incorporating student inquiry activities	100 percent
1.6.b. Learning outcomes addressing student understanding	Annual administrative audit of learning units	Number of learning outcomes addressing student understanding	One or more per unit
	Annual administrative audit of fieldtrip proposals	Number of learning outcomes addressing student understanding	One or more per fieldtrip
Outcome 1.7. Teachers differentiate instruction to meet the individual needs of students.			
1.7.a. Units specifically addressing differentiation	Annual administrative audit of learning units	Number of units specifying strategies/activities for differentiation	100 percent
Outcome 1.8. ISM articulates and effectively implements a comprehensive assessment policy.			
1.8.a. Assessment plans	Administrative audit of published assessment plans	Number of subjects with assessment plans comprising benchmark, formative, and summative assessments at each grade level	100 percent
1.8.b. Changes to published curriculum	Written justifications for changes to published curriculum	Percentage of justifications referencing assessment data	80 percent
1.8.c. Classroom interventions	Teachers' written descriptions of intervention strategies	Percentage of descriptions referencing assessment data	80 percent
Outcome 1.9. The educational program includes cocurricular and extracurricular activities that fit with the school's identity.			
1.9.a. Fieldtrips and campus events	Annual administrative audit of approved fieldtrips and campus events	Number of offerings for each class that align with ISM's identity	At least 2 per trimester per class
1.9.b. Extracurricular offerings	Annual administrative review of approved offerings	Number of competitive sports offerings that align with ISM's identity	At least five for boys and five for girls
Commitment 2: Efficient Development and Management of Resources			
2.a. External validation	Program review by the Council of International Schools, Western Assoc. of Schools and Colleges, and International Baccalaureate Org.	Accreditation by both CIS and WASC	Ongoing
		Authorization by IBO	By 2013
Outcome 2.1. ISM is financially solvent and follows a sustainable budget model.			
2.1.a. Balanced budget	Annual audited financial report	Net change in fund balance	Positive number
2.1.b. Cash reserve	Quarterly audit of monthly bank statements	Combined balance at close	Greater than payroll expenses for two months
Outcome 2.2. ISM clearly articulates fundraising strategies and programs, including ISM Foundation, grant writing, matching funds, community collaborations, and direct donations.			
2.2.a. Written fundraising plan	Annual administrative audit of plan	Percentage of fundraising areas with articulated guidelines and strategies	100 percent

Indicator	Measure	Metric	Target
Outcome 2.3. ISM has the instructional books, materials, supplies, and technologies necessary to achieve adopted curriculum goals.			
2.3.a. Teacher requests met	Annual administrative audit of inventory relative to teacher requests	Items rated critical in inventory	100 percent
Outcome 2.4. ISM has appropriate facilities for instruction and school management.			
2.4.a. Current facilities	Annual summary and evaluation of physical plant	Number of academic programs, student activities, employee activities, and administrative operations lacking functional space comprising sufficient square footage	Zero
		Number of functional spaces presenting safety or health concerns that have existed for more than one month	Zero
Outcome 2.5. ISM employs diverse and talented professionals who fulfill the schools operational and curriculum goals.			
2.5.a. Employee performance	Annual teacher reviews by principal	Percentage of teachers placed on professional improvement plans	<10 percent
		Percentage of professional improvement plans that provide clear corrective guidance	100 percent
		Percentage of teachers remaining on a professional improvement plans for more than two years	0 percent
	Annual performance reviews of non-teaching employees	Percentage of employees with an overall rating of Achieves or Exceeds Expectations	90 percent
		Percentage of employees who have received clear corrective guidance after receiving an overall rating below Achieves Expectations	100 percent
		Percentage of employees with an overall rating below Achieves Expectations in three consecutive years	0 percent
2.5.b. Employee goals	Teacher professional development plans	Percentage of teachers with at least one articulated goal that aligns with ISM's annual focus areas	100 percent
	Annual performance reviews of non-teaching employees	Percentage of employees with at least one articulated goal that aligns with ISM's annual focus areas	100
2.5.c. Employee demographics	Voluntary ethnicity self-report	Percentage of employees reporting *White Only*	Less than 50 percent of those reporting an ethnicity
	Voluntary international experience self-report	Percentage of employees reporting working/living internationally	Greater than 50 percent of those responding

Indicator	Measure	Metric	Target
Outcome 2.6. ISM facilitates ongoing evaluations relative to articulated job descriptions.			
2.6.a. Employee performance	Annual teacher reviews by principal	Percentage of teachers with a performance review on file by June 1	100 percent
		Percentage of evaluations referencing the general teaching job description plus any additional supplementary position description	100 percent
	Annual performance reviews of non-teaching employees	Percentage of employees with a performance review on file by June 30	100 percent
		Percentage of performance reviews referencing the employee's job specifications	100 percent
Outcome 2.7. ISM augments its resources by collaborating with community partners.			
2.7.a. Current partnerships	Listing of current partnerships	Number of ongoing partnerships	10
		Number of new partnerships each year	2
	Annual survey of ISM and external partner stakeholders	Average rating for overall value of the partnership	4.0 on a 5-point scale
Outcome 2.8. ISM teachers receive the planning and professional development opportunities necessary to deliver the IB Primary Years Programme and Middle Years Programme.			
2.8.a. Planning time	Class schedule	Planning minutes per week	400
		Planning minutes per week shared by each homeroom teacher with grade-level partner	200
2.8.b. Professional development opportunities	Annual budget	Professional development dollars provided for teachers	$17,500
	Annual schoolwide professional development plan	Number of orientation and professional development days	4 full days, and once-per week early-release days
		Percentage of activities based on needs assessment (e.g. annual employee survey results, curriculum team input, Strategic Plan focus areas, student testing results, mandates from funding and oversight agencies)	100 percent
Commitment 3: Clear Governance and Operations Structures			
3.a. External validation	Program review by the Council of International Schools, Western Assoc. of Schools and Colleges, and International Baccalaureate Org.	Accreditation by both CIS and WASC	Ongoing
		Authorization by IBO	By 2013

Indicator	Measure	Metric	Target
Outcome 3.1. ISM reviews and maintains practical, usable policies and procedures that comply with the California Education Code and other applicable requirements, including those for: ▶ The Board of Trustees ▶ Charter development, renewal, and monitoring ▶ Student and staff conduct and discipline ▶ Safety and crisis management ▶ Strategic planning ▶ Student support services			
3.1.a. Published policies and procedures	Annual administrative audit of published policies and procedures	Number of required policies approved and published within three months of identification of the requirement	100 percent
		Number of published policies not reviewed in more than two years or the review cycle designated in the published policy itself, whichever is greater	Zero
		Number of procedures identified as needing documentation not published within two months of identification of the need	Zero
		Number of published procedures not reviewed and updated in more than one year	Zero
		Number of published policies and procedures available both online and in print in an accessible location	100 percent
Outcome 3.2. ISM has an organizational structure with clearly defined roles and responsibilities within an articulated chain of command.			
3.2.a. Organization chart and job specifications	Annual organization report to the ISM Board	Percentage of positions listed on the organization chart with current job specifications	100 percent
Outcome 3.3. ISM has efficient and compliant data management processes.			
3.3.a. Data accessibility	Anecdotal reports of data accessibility	Monthly average number of reports from staff members that existing data cannot be accessed	2 or less
3.3.b. Data reporting compliance	Audits and incident reports	Annual instances of non-compliance with data reporting requirements and deadlines	Zero
3.3.c. Data security	Incident reports	Annual reports of data security issues	Zero
Commitment 4: Exemplary Communications and Relations			
4.a. External validation	Program review by the Council of International Schools, Western Assoc. of Schools and Colleges, and International Baccalaureate Org.	Accreditation by both CIS and WASC	Ongoing
		Authorization by IBO	By 2013

Indicator	Measure	Metric	Target
Outcome 4.1. ISM has an active community of families.			
4.1.a. Family hours	Family hours recorded per designated guidelines and mechanisms	Percentage of families recording some hours	100 percent
		Percentage of families meeting their family hours expectation	90 percent
		Total recorded hours	More than the prior year
Outcome 4.2. The ISM administration, Board, Family Association, Foundation, and teachers effectively communicate with ISM students and families.			
4.2.a. Communication channels	Administrative review of communication channels	Number of channels regularly utilized by each sending group	2 or more
4.2.b. Communication effectiveness	Annual parent/guardian survey	Average rating on each question related to communication effectiveness	3.5 on a 5-point scale
Outcome 4.3. ISM has effective working relationships with associated school districts and educational agencies.			
4.3.a. Perceived effectiveness of relationships	Annual board assessment	Average rating on each question related to the effectiveness of ISM relationships with school districts and educational agencies	4.0 on a 5-point scale
Outcome 4.4. ISM communicates effectively with its surrounding community.			
4.4.a. Applications	Annual summary of applications received following the final application window	Total number of applicants	10 times the number of open positions
4.4.b. Media releases	Annual spring summary of media releases and stories	Number of media releases and related media coverage	At least 6 releases; at least 3 stories picked up by the media
Outcome 4.5. ISM has meaningful links with other international schools and IB programmes.			
4.5.a. Current links with other international schools	Annual teacher survey	Percentage of teachers reporting beneficial, collaborative links with other international schools	70 percent
Outcome 4.6. ISM has significant community partnerships that reflect and support school priorities, particularly internationalism.			
4.6.a. Current community partnerships	Annual administrative audit of current partnerships	Percentage of partnerships directly supporting one or more strategic outcomes	100 percent
		Percentage of partnerships supporting one or more elements of the standards-based definition of *internationalism*	50 percent
Outcome 4.7. The ISM board and administration make their decision making transparent through effective communication to the ISM Community and other stakeholders.			
4.7.a. Stakeholder feedback	Annual teacher, parent/guardian, and student satisfaction surveys	Average rating on each question related to the transparency and understandability of board and administration decisions	4.0 on a 5-point scale

Appendices

Glossary

To ensure common understanding within the ISM Community, the Board of Trustees adopted several definitions at the start of the strategic planning process. The planners have added additional terms throughout the process as necessary to maintain clarity. The terms defined here appear in *italics* in the text of this plan to help indicate that they have specific meaning.

Articulation
Vertical alignment; coordination of curriculum and/or instruction for a single subject across all grade levels or a specified range of grade levels

Audit
A methodical examination of a representative sample of something, as opposed to a full review

Indicators
General dimensions of quality or achievement

Integration
Horizontal alignment; coordination of curriculum and/or instruction across all subjects within a grade level

ISM Community
Students, parents, teachers, staff members, administrators, trustees, and other interested parties

Measures
General instruments or means to assess performance in each area defined by an indicator

Metrics
A quantification, calculation method, or formula for a given measure

Mission
What ISM does each day; the fundamental purpose of our school

Planning assumptions and parameters
Statements of shared understanding going into the planning process that help focus and limit discussion

Strategic plan
A roadmap for the development of ISM that specifies ongoing strategic commitments and outcomes, as well as annual focus areas, without specifying operational tactics

Strategic commitments
Broad goals indicating what the *ISM Community* has committed to achieve over the long term to ensure that the *mission* gets executed in pursuit of the *vision*

Strategic focus areas
Broad areas of organizational emphasis during a given year, with which group and individual employee goals can be aligned to ensure unified efforts across the organization

Strategic outcomes
For each *strategic commitment*, specific results targeted over the medium term that, taken together, help to define the parameters of our commitments

Strategic priorities
Specific actionable and assessable objectives targeted in the short term to further progress toward related strategic outcomes [a term used from 2008 through 2012, then discontinued]

Tactics
How specific *ISM Community* members go about achieving strategic outcomes; operational plans; action steps

Targets
Specific quantifiable objectives, usually based on benchmarks, that set expectations or define what will constitute success on particular measures within a certain period of time

Vision
Why ISM does what it does; the desired future that we strive for

Our Strategic Planning Process

Initial Plan Creation

In November 2006, the Board of Trustees of the International School of Monterey officially launched a strategic planning process that targeted a finished product in 15 months. The Strategic Planning Committee of the Board created an initial planning document in December 2006 to provide structure for the process. Over the course of the 15 months, the Committee continually revised the document, morphing it from a planning document to a final plan. The board approved the original *strategic plan* at its January 26, 2008 annual retreat.

Goals for the Process

In January 2007, the Board of Trustees set the following goals for the strategic planning process.

1) Adopt a five-year plan that maps long-term *strategic commitments*, medium- to long-term *strategic outcomes*, and short-term *strategic priorities*.

2) For each strategic priority, specify a party responsible for *oversight* including creation and implementation of related action plans that outline operational *tactics* and specify timelines.

3) Create a usable reference that will guide virtually all decisions by trustees and school administrators.

4) Reaffirm—or revise as appropriate—the school's *mission*, *vision*, and other identifiers as foundations for strategic planning.

5) Identify persistent, challenging issues, and constructively and effectively address each.

6) Provide *ISM Community* members with multiple opportunities for input, both direct and through representation.

7) Unite members of the *ISM Community* around common purposes, and excite them about their roles in the future of the school.

8) Solidify an open, respectful, and productive relationship among the ISM trustees and the school faculty, staff, administration, and families.

Planning Assumptions & Parameters

Each year, the Board of Trustees agrees upon statements of shared understanding that help focus and limit the strategic planning discussion. These *planning assumptions and parameters* essentially remove some topics from the immediate discussion because they have become established facts or they have been addressed and agreed upon in the past. This constraint does not preclude separate explorations and discussions of possibilities that might lead to future revision of the assumptions and parameters. In fact, the Board of Trustees regularly engages in speculative discussion of new opportunities and directions as part of its due diligence.

Governance

▶ ISM operates as a California charter school, and, therefore, it is public and coeducational.

▶ ISM is chartered by the Monterey Peninsula Unified School District.

▶ ISM continuously aligns its programs, policies, procedures, and priorities with charter requirements and expectations.

▶ A self-perpetuating Board of Trustees governs ISM.

▶ A single leader heads the ISM school administration.

▶ The ISM leader serves as the external face of the school.

▶ ISM operates as a single school across the K-8 grade range (i.e. the school administration and assets are shared).

Educational Program

▶ ISM provides classroom-based education.

▶ ISM teaches grades kindergarten through eight.

▶ The primary language for instruction is English.

- ▶ ISM offers an international curriculum, and is transitioning to the International Baccalaureate (IB) Primary Years Programme (PYP) and Middle Years Programme (MYP).

- ▶ ISM prepares students for the world they will live in tomorrow, not just today.

- ▶ ISM uses computer technology to prepare students for the world of tomorrow.

- ▶ ISM offers a rigorous, inquiry-based educational program.

- ▶ ISM uses a relevant process of assessment and verification to measure student progress.

- ▶ ISM expects homework and the involvement of parents/guardians in their children's learning as extensions of the classroom experience.

Finance/Resources

- ▶ ISM operates as a nonprofit entity.

- ▶ ISM targets a balanced budget at minimum, while striving to build its financial reserves.

- ▶ ISM leverages technology to increase efficiency and reduce operational costs.

- ▶ ISM expects contribution of time and money from the family community.

- ▶ While ensuring compliance with all specific requirements of federal and state law, to the fullest extent possible, ISM applies its limited resources—human, fiscal, and physical—evenly across the full spectrum of enrolled students without discrimination based on educational ability, current academic performance, or any other variable, with the intent of differentiating instruction to challenge each and every student to continually advance academically and personally.

Plan Development Through the Years

Review of the school's existing guiding identity statements was the first major area of schoolwide discussion during the initial strategic planning process. Following several months of exchange within the planning groups and with the broader *ISM Community* through email exchange and a townhall meeting in spring 2007, the *ISM Community* agreed on the vision, mission, motto, etc. listed in the Guiding Identity Statements section of this plan, and the Board officially adopted them on September 17, 2007.

Once the *ISM Community* agreed upon the guiding identity statements, the planning groups engaged in a concerted process to develop *strategic commitments*, *outcomes*, and *priorities* that would focus ISM's efforts over the next five years on solidifying all aspects of its articulated identity.

The process began with identification of *strategic commitments*—broad goals indicating what the *ISM Community* commits to achieving over the long term to ensure that the *mission* gets executed in pursuit of the *vision*. Then, for each commitment, the planners determined *strategic outcomes*—specific results targeted over the medium term that, taken together, define the parameters of the *commitments*.

Next, the planning groups sorted through a long list of possibilities suggested by reports from the Charter Schools Development Center and the Western Association of Schools and Colleges/Council of International Schools joint accreditation team*, survey and email input from members of the *ISM Community*, and the planners' own insights to determine *strategic priorities*—specific actionable and assessable objectives targeted in the short term to further progress toward related *strategic outcomes*.

Finally, for each priority, the planners listed an *oversight* party—the group or individual ensuring the steady pursuit and eventual achievement of the priority through development of operational plans and assignment of specific responsibilities—and *indicators*—how we will know we have successfully fulfilled each commitment.

As a general guideline, the initial planners agreed that the plan should list no more than 25 immediate *priorities* for any year given the limited human and fiscal resources available to address them. Subsequently, the 2009 Strategic Advisory Team recommended a much shorter list of no more than 15 *priorities*. As a result, many *strategic outcomes* did not have immediate *priorities* listed beneath them. This did not mean that those *outcomes* were not as important or that they had already been fully achieved. Rather it indicated that other *outcomes* required more immediate action. As we added new *priorities* to the plan each year, we eventually targeted further progress toward overall *outcomes* through those *priorities*.

After drafting the 2010-2014 update of the plan, recognizing the need for specifics on how to measure success, the 2010 Strategic Advisory Team continued to meet in early 2010 to add *indicators*, *measures*, *metrics*, and *targets* for each *outcome* and *commitment* rather than list *indicators* alone for each *commitment*. This work was

completed by the 2011 Strategic Advisory Team, which also added *milestones* for each priority to facilitate assessment of progress. For ease of reference, in the 2012-2017 iteration of the plan, the Strategic Advisory Team moved the *indicators*, *measures*, *metrics*, and *targets* to a new Assessment section following a simple listing of the strategic *commitments* and *outcomes*.

The initial 2008-2012 plan focused on where the school would go in the next five years, and specified actionable and assessable *priorities* for the first year of the plan. Through fall 2010, the Strategic Advisory Team set out new *priorities* for each ensuing year. In fall 2011, the Strategic Advisory Team discussed the need for a very short list of more overarching annual goals rather than specific *priorities*. The team ultimately recommended to the board that the annual plan update designate 2-4 *strategic focus areas* that would provide a framework for individual staff, board, and organizational annual goals directed toward common purposes.

Calendar Alignment

From the initial 2008-2012 Strategic Plan through the original 2011-2015 iteration, this plan was organized around calendar years. Two major factors influenced that decision. First, the planners felt that launching initiatives at the start of the calendar year would provide the necessary lead-time to effectively implement change at the start of the fiscal or school year six months later. Second, they recognized that fall offered the best opportunity to pull people together to plan the next year's *priorities* because ongoing stakeholders start the fall reinvigorated from the summer break and enthusiastic new staff members and families who have just joined the school bring new perspectives and energy to the process.

In December, 2011, the Strategic Advisory Team recommended that the 2011-2015 plan be extended through June 2012, and that ensuing annual updates be organized around the July-June fiscal and calendar year so that annual staff goals and current year funding can be aligned with the strategic plan throughout the year. The board subsequently adopted this realignment through approval of a revised *2011-2016 Strategic Plan*.

Annual Plan Renewal

The ISM *strategic plan* continues to evolve. The initial 2008-2012 plan focused on where the school would go in the next five years, and specified actionable and assessable *priorities* for the first year of the plan. Each fall, the Strategic Planning Committee of the ISM Board reconvenes a Strategic Advisory Team to do two things: 1) determine whether or not the *strategic commitments* and *strategic outcomes* in the plan need revision before extending the life of the plan one more year; 2) set out new *strategic focus areas* for the ensuing year. (NOTE: Through fall 2010, the Strategic Advisory Team set out new *priorities* for the ensuing year rather than *one-year focus areas*.) The Board, Committee, and Team solicit input from the entire *ISM Community* via email, surveys, and open meetings. Thus, this remains a living plan, always looking five years out while specifying immediate *strategic focus areas*.

ISM Community Involvement

Given that this will remain a living plan, the Board of Trustees encourages all members of the *ISM Community* to take an active role in shaping the future of the school through input and involvement. Everyone can provide input on school strategies at any time by:

- ► Emailing **strategic@ismonterey.org**
- ► Leaving a message in the school office for the Strategic Planning Committee

Members of the *ISM Community* wanting to become actively involved as members of the Strategic Advisory Team can communicate their interest via the same channels.

Publication

ISM publishes the current version of the plan each spring following approval by the Board. These annual versions are posted to the ISMonterey.org website.

The school also publishes and promotes mechanisms for stakeholders to get involved both in ongoing planning and in action around current focus areas.

Year-End Summaries

2011-2012 Strategic Priorities Year-End Summary

The following table summarizes 2011-2012 strategic priorities and responsible parties, and indicates their disposition at the end of the 2011-2012 school year.

Priority		Disposition
1.4.1.	Establish and follow a plan to fund and implement the Primary Years Program (PYP) and Middle Years Program (MYP) of the International Baccalaureate (IB).	Completed
1.4.2.	Articulate grade-level performance benchmarks for Spanish listening, speaking, reading, and writing abilities differentiated for various student cohorts based on entry point into ISM, years of formal Spanish instruction, and native language; assess current performance relative to these benchmarks; and implement a plan to close any gaps and ensure ongoing achievement of the targets.	In progress
1.5.1.	Publish online and in print, the scope and sequence for all subjects (English language arts, mathematics, physical education, science, social studies, Spanish, the arts, and technology), including progressive measurable outcomes for grade levels K through 8.	In progress
1.5.2.	Fully implement a homework and assessment policy that details expectations, guides coordination among homeroom and specialist teachers, and ensures a steady grade-level-appropriate homework load and reasonable schedule of assessments.	Redefined
1.7.1.	Establish and follow the school's overall philosophy and strategies for reading instruction including early diagnosis of reading ability and intervention strategies that increase the number of students reading at and above grade level.	In progress
1.7.2.	Establish and follow the school's overall philosophy and strategies for providing differentiated instruction for students performing above grade level to keep them challenged and to help them achieve their full academic potential.	Completed
1.8.1.	Conduct regular, directed, and comprehensive student assessments, track related data, and use that data to direct teaching and learning and guide school decisions.	In progress
2.2.1.	Coordinate all fundraising activities through a comprehensive fundraising plan.	In progress
2.3.1.	Fully implement an ISM technology plan that guides: effective technology staffing; acquisition and implementation of appropriate hardware and software, systems adoption and integration, and teaching and learning spaces; integration of technology learning outcomes into the curriculum; and overall maintenance of the technology resources necessary to best support daily teaching and learning.	In progress
2.5.1.	Attract, hire, and retain a high quality Principal.	Completed
2.8.1.	Establish a professional development plan integrating IB requirements and opportunities to address the needs and interests of teachers, support all components of the curriculum (e.g. units of inquiry and standalone subjects) and pedagogy, and follow best practices.	Completed
3.1.1.	Establish comprehensive policies, procedures, and systems for school safety, emergency preparedness, crisis management, and facilities security.	In progress
4.1.1.	Maximize the value of Family Hours by communicating clear job descriptions that ensure the best possible match between volunteers and volunteer opportunities/needs.	In progress

2010 Strategic Priorities Year-End Summary

The following table summarizes 2010 strategic priorities and responsible parties, and indicates their disposition at the end of 2010.

Priority		Disposition
1.1.1.	Choose and begin to implement one or more curriculum models (e.g. Primary Years Program [PYP] and Middle Years Program [MYP] of the International Baccalaureate [IB]; International Primary Curriculum [IPC]). (Principal)	Advanced
1.2.1.	Build a schoolwide character culture aligned with ISM's mission to educate all students toward becoming conscientious, compassionate, and responsible citizen of the world. (Director)	Launch completed; left on course
1.4.1.	Articulate grade-level performance benchmarks for Spanish listening, speaking, reading, and writing abilities differentiated for various student cohorts based on entry point into ISM, years of formal Spanish instruction, and native language; assess current performance relative to these benchmarks; and implement a plan to close any gaps and ensure ongoing achievement of the targets. (Principal)	Retained
1.5.1.	Adopt and implement a homework policy that details expectations, guides coordination among homeroom and specialist teachers, and ensures a steady grade-level-appropriate homework load. (Principal)	Retained
1.8.1.	Conduct regular, directed, and comprehensive student assessment, track related data, and use that data to direct teaching and learning and guide school decisions. (Principal)	Advanced
1.10.1.	Plan and launch a schoolwide campaign, with both academic and operational components, focused on improved student nutrition. (Principal)	Launch completed; left on course
2.2.1.	Coordinate all fundraising activities through a comprehensive fundraising plan. (Director)	Retained
2.3.1.	Revise the ISM technology plan to guide effective technology staffing; acquisition and implementation of appropriate hardware and software, systems adoption and integration, and teaching and learning spaces; and integration of technology learning outcomes into the curriculum. (Director)	Retained with modifications
2.3.2	Develop and begin to implement a plan detailing strategies to reduce paper use and related costs; to ensure an efficient and effective approach to printing and copying; and to determine whether to purchase multiple copies of materials, to reproduce them, or to distribute them digitally. (Director)	Completed
2.5.1.	Attract, hire, and retain high quality teachers and non-teaching staff. (Director)	Left on course
2.8.1.	Maintain a sustainable, low-cost professional development plan that addresses the needs and interests of teachers, supports all components of the curriculum, and follows best practices. (Principal)	Retained with modifications
3.1.1.	Complete all steps necessary for timely renewal of the ISM Charter and related MOUs, determining and negotiating desired changes, and ensuring ongoing compliance with all of their terms both before and after renewal. (Director)	Completed
3.1.2.	Establish comprehensive policies, procedures, and systems for school safety, emergency preparedness, crisis management, and facilities security. (Operations & HR Manager)	Retained
4.2.1.	Through effective communication, increase stakeholder understanding of ISM plans, policies, and procedures as well as utilization of available school services. (Director)	Left on course

2009 Strategic Priorities Year-End Summary

The following table summarizes 2009 strategic priorities and responsible parties, and indicates their disposition at the end of 2009.

Priority		Disposition
1.1.1	Ensure that internationalism has been integrated and enacted across the curriculum. (Curriculum Committee)	Completed
1.1.2	Conduct a cost-benefit analysis of certification associated with alternative curriculum models. (Head of School)	Retained with modifications
1.4.1	Strengthen the Spanish program. (Curriculum Committee)	Retained with modifications
1.4.2	Strengthen the science program. (Curriculum Committee)	Completed
1.4.3	Strengthen the English and Language Arts program. (Curriculum Committee)	Completed
1.4.4	Integrate the arts throughout the curriculum. (Curriculum Committee)	Completed
1.5.1	Document a K-8 curriculum that *integrates* and *articulates* all subjects (language arts, mathematics, science, social studies, Spanish, the arts, and technology). (Curriculum Committee)	In progress
1.7.1	Identify and document strategies and professional development needs to enable the delivery of differentiated instruction with phased introduction by grade. (Curriculum Committee)	Completed
2.1.1	Create a clear, inclusive budget process that allows input from all levels of staff and aligns with the curriculum and *strategic plan*. (Board Finance Committee)	Completed
2.1.2	Develop a budget plan that uses ADA as a base and develop alternative models for presenting this budget. (Board Finance Committee)	Completed
2.2.1	Develop a comprehensive fundraising plan. (Board)	Retained with modifications
2.2.2	Develop a grant-solicitation plan that details roles and responsibilities, and an annual timeline. (Head of School)	Completed
2.3.1	Prioritize allocation for books and instructional materials, maximizing federal subsidies. (Board Finance Committee)	Completed
2.3.2	Rewrite the ISM technology plan. (Technology Committee)	Retained with modifications
2.5.1	Document a master plan for attracting, hiring, and retaining quality faculty and staff. (Head of School)	Retained with modifications
2.7.1	Invite other educational institutions to play an active role in academic planning and delivery. (Site Council)	Delayed
2.8.1	Establish in-house mentoring to improve instructional quality and assist with *integration* of the curriculum. (Curriculum Committee)	Completed
2.8.2	Fund, and execute a professional development plan that addresses teaching and learning needs. (Curriculum Committee)	Retained with modifications
2.8.3	Ensure sufficient planning time and resources to implement and integrate the curriculum. (Head of School)	Completed
3.1.1	Modify policies and procedures for safety and crisis management. (Safety Committee)	Retained with modifications
3.1.2	Renew priorities for the 2010-2011 school year within the *ISM Strategic Plan*, distribute it to all stakeholders, and ensure that other school plans, policies, and procedures appropriately reference and reflect the school identity and *strategic commitments*, *outcomes*, and *priorities* in the *strategic plan*. (Board)	Completed
4.2.1	Establish an official ISM position on communications in languages other than English, then map any related processes. (Director)	Completed
4.6.1	Develop and deepen existing partnerships with local institutions that have an international focus. (See also outcome 2.7.1) (Head of School)	Completed

2008 Strategic Priorities Year-End Summary

The following table summarizes 2008 strategic priorities and responsible parties, and indicates their disposition at the end of 2008.

Priority		Disposition
1.1.1	Define internationalism and what it looks like in action at ISM. (Board)	Completed
1.1.2	Conduct a cost-benefit analysis of alternative curriculum models (e.g. International Baccalaureate Primary Years and Middle Years programs), then adopt the appropriate program(s). (Head of School)	Retained with modifications
1.2.1	Ensure that the curriculum addresses character development and conflict management to promote a positive school climate. (Curriculum Committee)	Completed
1.4.1	Strengthen the Spanish program. (Curriculum Committee)	Ongoing/retained
1.4.2	Strengthen the science program. (Curriculum Committee)	Ongoing/retained
1.4.3	Strengthen the reading program. (Curriculum Committee)	Expanded to all language arts
1.5.1	Document a K-8 curriculum that *integrates* and *articulates* all subjects (language arts, mathematics, science, social studies, Spanish, the arts, and technology). (Curriculum Committee)	Ongoing/retained
1.5.2	Designate who has responsibility for coordination of each component of the curriculum. (Head of School)	Completed
2.1.1	Create a clear, inclusive budget process that allows input from all levels of staff and aligns with the curriculum and *strategic plan*. (Board Finance Committee)	Retained
2.1.2	Maintain cost controls by establishing a budget model that uses ADA (average daily attendance) as base. (Board Finance Committee)	Retained
2.2.1	Develop a strategic communications plan for the annual family fair share campaign that details appropriate messaging, progressive communications, and supporting materials. (Foundation Board)	Retained with modifications
2.2.2	Develop a grant-solicitation plan that details roles and responsibilities, and an annual timeline. (Head of School)	Ongoing/retained
2.5.1	Document a plan for attracting, hiring, and retaining quality faculty and staff. (Head of School)	Retained
2.8.1	Establish in-house mentoring to improve instructional quality and assist with *integration* of the curriculum. (Curriculum Committee)	Retained
2.8.2	Articulate, fund, and execute a professional development plan that addresses teaching and learning needs. (Curriculum Committee)	Retained with modifications
3.1.1	Establish policies and procedures for safety and crisis management. (Safety Committee)	Retained with modifications
3.1.2	Effectively communicate and enforce the student conduct and discipline policy. (Associate Head of School)	Completed
3.1.3	Complete the *2008-2012 ISM Strategic Plan*, distribute it to all stakeholders, and ensure that other school plans, policies, and procedures appropriately reference and reflect the school identity and *strategic commitments*, *outcomes*, and *priorities* in the *strategic plan*. (Board)	Completed
3.2.1	Review current administrative structures and roles, redefining existing roles and adding new roles as appropriate. (Head of School)	Retained
4.1.1	Establish family volunteerism as a core value. (Board)	Completed
4.3.1	Encourage every Monterey Peninsula Unified School District and Monterey County Office of Education board member to tour ISM and review information about the school. (Board)	Completed
4.6.1	Develop partnerships with local institutions that have an international focus. (Head of School)	Retained with modifications

International School of Monterey

Vision

A world of understanding

Mission

Educate all children toward becoming conscientious, compassionate, and responsible citizens of the world.

Academic Commitments

Internationalism ▶ Inquiry ▶ Understanding ▶ Success

Motto

The world is our home. We will make it better.

Who We Are

A successful school created to…

- ▶ Bring worldclass international education to a public school setting.
- ▶ Integrate best practices, established standards, and an international curriculum.
- ▶ Maintain a multicultural environment that advances understanding of and respect for all.
- ▶ Promote strong partnerships among school, home, and community.

Outstanding teachers who…

- ▶ Foster the holistic growth of each student.
- ▶ Apply learning to the real world.
- ▶ Maintain high expectations in the classroom.
- ▶ Continue professional development.

Thriving students who…

- ▶ Think freely and believe in self.
- ▶ Develop personal potential.
- ▶ Respect everyone.
- ▶ Connect with the world.

Involved parents who…

- ▶ Maintain high expectations at home.
- ▶ Express enthusiasm for learning.
- ▶ Participate in each child's learning every day.
- ▶ Support the school.