

Town of Westlake, Texas

Strategic Plan

2025-2032



Prepared for the Town of Westlake by





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Letter from Mayor Greaves



Dear Westlake Residents, Academy Parents, Corporate Partners, and Stakeholders,

As Mayor of the Town of Westlake, I am honored to present our latest strategic plan on behalf of the Town Council / Board of Trustees. This document represents our unwavering commitment to the core values of integrity, accountability, innovation, openness, and strategic thinking while charting a clear path for Westlake's growth and development over the next seven years – 2025 to 2032.

Our strategic plan ensures that Westlake remains a thriving and inclusive place to call home. One that will continually preserve its unique charm and natural beauty, promote a vibrant community and cultivate partnerships with residents and corporate stakeholders.

This plan sets forth a vision for organizational stability at Town Hall and continued excellence at Westlake Academy, and focuses our efforts on financial sustainability, managed development and growth, enhanced community safety, and robust public engagement.

We are dedicated to implementing this plan, using it as a guide that serves the public interest and strengthens trust in our leadership. The plan will empower our staff to take proactive steps to enhance Westlake's vibrancy, support our residents and businesses, and ensure a sustainable future for all.

Your involvement is crucial to the success of this plan. I want to express my gratitude to those of you who took the time to participate in our numerous public engagement efforts. Together, we will continue collaborative efforts to realize the full potential of the Town and Westlake Academy as we build a community that we can all be proud of.

Thank you for your continued support as we work together toward a brighter future for Westlake.

A simple, stylized line drawing of a handwritten signature, consisting of a large 'K' and a trailing line.

- Mr. Kim Greaves, Mayor Town of Westlake

Your Westlake Town Council

Dr. Anna White

Councilmember, Place 1



Mr. Michael Yackira

Councilmember, Place 2



Mr. Todd Gautier

Councilmember, Place 3



Mrs. Tammy Reeves

Mayor Pro Tem, Place 4



Mr. Mike Asselta

Councilmember, Place 5



Executive Summary

The Town of Westlake, in collaboration with Baker Tilly Advisory Group, has developed a strategic plan to guide the community's growth and sustainability over the next seven years. This plan builds on Westlake's tradition of strategic, inclusive, and forward-thinking planning, exemplified by the current comprehensive land use plan (2015), and contributes to the Town's vision, mission, goals, and priorities through active public engagement. Workshops and sessions with residents, business owners, and stakeholders were fundamental in identifying critical areas of focus such as economic development, infrastructure, and long-term financial stability.

Central to Westlake's strategic achievements and overall desirability is the Westlake Academy, established in 2003. This municipally-owned public charter school was founded out of a desire by the Westlake Town Council to offer a high-quality, globally recognized International Baccalaureate (IB) curriculum for residents of the Town and surrounding communities. The Academy serves as a model of educational innovation and reflects Westlake's commitment to academic excellence.

The Town's current financial position reflects the effective management of resources and capital investments. By maintaining general fund reserves through prudent fiscal oversight and leveraging one-time revenue sources from development fees, Westlake has managed to sustain an annual surplus averaging \$2.6 million. However, when accounting for unfunded capital projects, projections indicate a growing fiscal gap of \$4.4 million annually, expanding to \$8 million by FY 2035 without including current or future known development revenue. Without corrective action, the projected gap will deplete reserves by 2035. This looming challenge emphasizes the need for comprehensive financial strategies to secure Westlake's long-term fiscal health. With additional changes over time, Westlake can build on its already solid foundation and exceed its current achievements.

Economic development is integral to addressing these financial concerns. Westlake's unique position, characterized by rural charm, high-value real estate, and strategic corporate campuses, presents substantial opportunities for future growth. As the Town considers future land use and development, it must balance economic ambitions and the need for increased revenue with preserving its distinctive character, all while considering growth that is strategically located and of high quality.

Sustainable economic growth will not only support property tax and sales tax revenue but will also require deliberate efforts to attract a diverse and robust mix of businesses.

Together, these strategic initiatives position the Town of Westlake to navigate future growth with confidence and sustainability, ensuring that it remains a vibrant and distinctive community for generations.



About Strategic Plan 2025-2032

The Town of Westlake's process for updating its vision and goals to guide decision making and resource allocation is built upon three foundational pillars:

- 1. A Fiscal Model and Financial Sustainability Plan,**
- 2. An Economic Development Plan, and**
- 3. A Strategic Plan.**

The Fiscal Model and Sustainability Plan and the Economic Development Plan have been delivered to the Town of Westlake as separate reports entirely accessible on the Town's website.

From August to December 2024, Baker Tilly engaged in extensive research and analysis in preparing and updating Westlake's vision, mission, values, goals, priorities and success indicators. This work included interviews with members of the Westlake Town Council, the Town management team, and the Westlake Academy head of school and leadership team. In addition to these interviews, two surveys were deployed to the employees of the Town of Westlake, and another to community residents, Academy parents and business stakeholders. Six on-site and two virtual community input sessions and workshops were also held.

The data gathered from the interviews, surveys, and public input sessions allowed Baker Tilly to generate key themes and analysis to identify the Town's strengths, weaknesses, opportunities, and threats/challenges (SWOC). The SWOC analysis informed the development of updated vision and mission statements, a refined set of organizational values, and strategic goals.

About Strategic Plan 2025-2032

Alignment between the three strategic planning components is crucial to provide Town leaders with a comprehensive assessment to make informed decisions in the upcoming years, particularly to guide the preparation of the Town's Fiscal Year 2025-2026 budget process and beyond. To achieve this, the three components were developed simultaneously on parallel tracks:

- 1. Fiscal Model and Financial Sustainability Plan:** These components were completed to inform the Council's identification of fiscal opportunities; and the model serves as a tool for assessing funding and resource projections, ensuring that decisions and strategic priorities are grounded in the realities of current and future available resources.
- 2. Economic Development Plan:** This forward-focused strategy complements and incorporates findings included in the Financial Sustainability Plan, providing insights into potential future resources derived from an economic development strategy.
- 3. Strategic Plan:** This document integrates the findings from the Fiscal Model and the Economic Development Plan, tying everything together into a cohesive strategy.



About Strategic Plan 2025-2032

The uniqueness of Westlake's approach lies in its comprehensive and integrated method. As standalone documents, the Fiscal Model and Economic Development Plan provide detailed assessments of the Town's financial health and growth potential.

However, when combined, these documents offer a holistic view that highlights current economic conditions and projects future trends and opportunities. This integration ensured the development of strategic priorities that are well-informed, sustainable, and aligned with immediate and long-term goals.





Strategic Plan 2025-2032 Framework

Vision

Mission

**Organizational
Values**

Priorities

**Goals and
Strategies**





Vision

Our vision within a strategic plan is a clear and aspirational statement that outlines the desired future state or long-term goals of an organization. It serves as a guiding star, providing direction and inspiration for all strategic initiatives.

The Westlake vision statement guides the Town's future direction, ensuring that growth and development are aligned with our core values and community aspirations. Westlake's Vision:

Westlake will preserve its unique charm and natural beauty, promoting a vibrant community, cultivating strategic partnerships with residents and corporate stakeholders.



Mission

Our mission statement is a concise declaration of an organization's core purpose and focus that remains unchanged over time. It defines the organization's reason for existence and provides a framework for its strategic planning.

Unlike a vision statement, which outlines long-term aspirations, a mission statement focuses on the present and defines the town's purpose and primary objectives.

Our mission underscores Westlake's dedication to ensuring that the community enjoys top-notch services and educational opportunities for its residents. Westlake's mission:

Westlake provides a superior quality of life through excellent municipal service delivery and world-class education.



Organizational Values

Organizational values are the fundamental beliefs and guiding principles that shape an organization's culture, behavior, and decision-making processes. They define what the organization stands for and influence how it interacts with stakeholders.

Our values of accountability, integrity, innovation, openness, and strategic thinking collectively support Westlake's mission of providing superior municipal services and education, and its vision of preserving charm and fostering community. Westlake's Organizational Values:

Accountability

Taking responsibility for actions and outcomes, ensuring that the Town's services meet the highest standards.

Integrity

Upholding the highest ethical standards in all actions and decisions, ensuring trust and transparency within the community.

Innovation

Encouraging creative solutions and continuous improvement in service delivery and community development.

Openness

Promoting transparency and proactive communication with residents, partners and stakeholders.

Strategic Thinking

Planning and acting with a long-term perspective to achieve sustainable growth and development.



Strategic Priorities

To build a thriving and resilient community, Westlake has identified six key priorities to guide our efforts and use of resources. The priorities are designed to promote sustainable growth, improve quality of life, and strengthen the Town's organizational foundation to attain a strong financial position, world-class education system and quality development over the next seven years. Each priority plays a vital role in achieving our vision for the future:

A. Financial Sustainability

B. Westlake Academy

C. Development and Economic Growth

D. Infrastructure Investment

E. Communication – Resident/Stakeholder Engagement

F. Public Safety





Goals and Strategies

The following tables describe the priorities in more detail, including the goals needed for achieving the respective priority, the key outcome, or key performance indicator for measuring the success of the goal, as well as individual strategies for achieving each goal. When considering the vision, mission, and organizational values, these priorities and the sub-parts make up the Town of Westlake's strategic framework for guiding decisions in the coming three years.

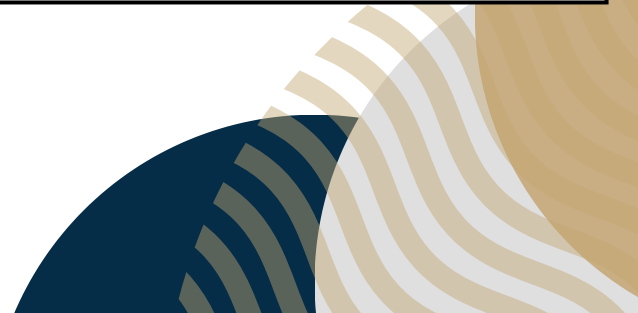
Priority A. Financial Sustainability

Description: Ensure a strong financial outlook through careful planning and sustainable service levels to meet Westlake's current and future needs.

Goals	Strategies
1. Maintain minimum general fund reserves at or above minimum reserve policy throughout life of the long-range financial forecast	<ul style="list-style-type: none">a) Review Town minimum reserve and use of reserves policies annuallyb) Establish a use of reserves policy that identifies Council approved uses of reservesc) Update the Town's long-range financial forecast annually using proposed budget as the baseline budget in the forecast
2. Establish maximum annual financial support levels for Westlake Academy	<ul style="list-style-type: none">a) Review Academy minimum reserve policies annuallyb) Establish a maximum annual financial support policy from the Town's General Fund expressed as dollar amount and/or as a percentage of Academy annual operating costs. Municipal funding amounts could be influenced by revenue gained from state funding and donations each year, with a goal of decreasing the dollar value equivalent to not greater than \$1 million per year starting in FY 2026-27.c) Update the Academy's long-range financial forecast annually using proposed budget as the baseline budget in the forecast

Priority A. Financial Sustainability

Goals	Strategies
3. Create priority-based budget every other fiscal year	<ul style="list-style-type: none">a) Assess community priorities that inform an update to the adopted strategic plan prioritiesb) Update the Town and Academy strategic plan to inform fiscal and program prioritiesc) Develop proposed biennial budgets for each of the Town and Academy departmental/programs reflective of updated strategic plan prioritiesd) Evaluate cost-efficient alternatives to existing service delivery methods for highest-priority servicese) Update long-range financial forecast to determine revenue/resource availability to fund programsf) Determine if resource availability requires changes/reductions to existing programs using priority levels
4. Develop a compensation policy	<ul style="list-style-type: none">a) Develop a compensation policy to include benefits that are approved by the Town Council and Board of Trustees and used by the Town and Academy in preparing annual budgetsb) Create a list of agreed upon comparison municipalities and school districts/private/and charter schoolsc) Develop a compensation policy to include desired percentile and “band of competitiveness” targets of the comparison municipalities and school districts etc.d) Reevaluate the desired compensation, benefits package every three years with cost of living raises throughout the package as needed to stay in the desirable range of pay for all positions



Priority A. Financial Sustainability	
Goals	Strategies
5. Reduce spending based on the Council adopted fiscal model	<p>a) Use priority-based approach to reduce Town annual General Fund expenditures by 3%</p> <p>b) Decrease Westlake Academy's annual General Fund expenditure by \$500K</p> <p>c) Evaluate a minimum of two Town Departments a year for cost-efficiency opportunities</p>
6. Increase Town revenues	<p>a) Identify opportunities for increased revenues</p> <p>b) Increase the Town's revenues, outside of ad valorem taxes, by 5% over the next two years</p> <p>c) Increase the Blacksmith funding from the Westlake Academy Foundation by 25% over the next two years</p>



Priority B. Westlake Academy

Description: Provide a world-class education for college-bound students to achieve their highest potential.

Goals	Strategies
Financial Sustainability	
1. Create a plan to increase Westlake Academy revenue and donations	<ul style="list-style-type: none"> a) Collaborate with the Westlake Academy Foundation to establish goals and priorities b) Identify revenue options and alternatives (e.g., assess the need to add additional classes by grade, add private class offerings, etc.) c) Evaluate options with the Board of Trustees d) Prepare the plan for adoption e) Develop an action plan to address immediate priorities
2. Improve operational effectiveness at the Academy	<ul style="list-style-type: none"> a) Assess Academy operations for academic, administrative and facilities management departments, divisions and programs b) Identify waste and redundancy c) Prioritize improvements and actions d) Track and monitor resource expenditures e) Report outcomes to the Town Council/Board of Trustees
Educational Programming	
3. Work with local and state legislators to prioritize equitable charter school funding	<ul style="list-style-type: none"> a) Develop informational materials b) Engage partners and parents c) Schedule and meet with local and state legislators d) Identify next steps after initial meetings

Priority B. Westlake Academy

Goals	Strategies
4. Prioritize the International Baccalaureate education model	<ul style="list-style-type: none">a) Annually review curriculum offeringsb) Identify curriculum options for students with proficiencies unrelated to STEM
5. Assess and improve instructional methods across the campus	<ul style="list-style-type: none">a) Assess faculty performance and use of supplemental curriculumb) Identify gaps and develop improvement plans
Campus Facilities	
6. Identify capital improvements and facilities for expanded programming	<ul style="list-style-type: none">a) Develop a campus facilities master planb) Prioritize facilities improvements and identify funding sourcesc) Align campus facilities with the Town
7. Create a maintenance and improvement plan for campus facilities and grounds	<ul style="list-style-type: none">a) Conduct an assessment of campus facilitiesb) Identify priority improvements based on programming and needc) Present to Town Council/Board of Trustees for adoptiond) Prepare annual maintenance and improvement work plan for facilities and grounds

Priority C. Development and Economic Growth

Description: Pursue intentional economic development initiatives that attract, retain, and expand businesses, promote job creation and deliver a diversified tax base.

Goals	Strategies
1. Update the Comprehensive Plan	<ul style="list-style-type: none"> a) Prepare work plan for updating the Comprehensive Plan b) Conduct public engagement c) Identify draft land use and development vision and goals d) Prepare draft Comprehensive Plan e) Review draft plan with the Town Council f) Adopt plan and initiate implementation
2. Create a mixed-use zoning district	<ul style="list-style-type: none"> a) Prepare objectives and strategies within a work plan to develop the new zoning chapter b) Work with Council and Town stakeholders to identify options for mixed used development based on building form and placemaking for a town center c) Draft zoning options for mixed-use development and identify text and map recommendations d) Schedule public hearing with the Town Council to discuss options and recommendations
3. Create an economic development incentive policy	<ul style="list-style-type: none"> a) Review current economic development incentives b) Assess economic development incentives used in competitor jurisdictions c) Develop draft criteria for economic development incentives and criteria
4. Develop a retail development strategy	<ul style="list-style-type: none"> a) Develop a request for proposals for a retail strategist b) Identify current and projected retail demand and gaps for the Westlake trade area c) Develop a targeted approach for priority service providers

Priority C. Development and Economic Growth

Goals	Strategies
5. Complete quarterly business check-ins	<ul style="list-style-type: none">a) Schedule business check-insb) Develop to-dos and next stepsc) Prepare quarterly progress reports
6. Update the land use and development process	<ul style="list-style-type: none">a) Assess current land use and development regulations and processesb) Map current workflow for processing applications and development plans and cycle timesc) Identify process improvements



Priority D. Infrastructure Investment

Description: Maintain, replace, and expand Westlake's capital assets for community development and growth.

Goals	Strategies
1. Complete a water systems engineering review	<ul style="list-style-type: none">a) Engage internal and professional engineers to review the current Westlake water system infrastructureb) Submit recommendations for maintenance or replacement of infrastructure for Council considerationc) Replace equipment, vehicles, technology, and personnel resources to align with water systems engineering review
2. Prepare a comprehensive infrastructure assessment with recommendations for improvement	<ul style="list-style-type: none">a) Create maintenance programs for the water system, wastewater system, storm drain system, roadways, parks, and pathwaysb) Specify a minimum number of annual inspections and criteria for completing capital improvement recommendations for all Town and Academy infrastructure and facilities
3. Create future water infrastructure expansion plans	<ul style="list-style-type: none">a) Create a plan for future expansion of the water system to facilitate future development and increase redundancy in the current systemb) Complete and routinely update the water modelc) Make recommendations for future water system improvementsd) Add agreed upon improvements to the capital improvement plan
4. Invest in Westlake Academy infrastructure expansions	<ul style="list-style-type: none">a) Initiate a capital funding campaign through the Foundation for a future Westlake Academy performance hallb) Obtain external funding equivalent to at least 50% of necessary funding from external sources

Priority E. Communication – Resident and Stakeholder Engagement

Description: Provide meaningful and consistent communication to keep residents, partners, and stakeholders informed and engaged.

Goals	Strategies
1. Develop Council communication priorities and strategy	<ul style="list-style-type: none"> a) Capitalize on the priorities laid out by Council, including creating specific communication pieces for the strategic plan priority areas b) Tailor these messages to residents, parents, corporate partners, and stakeholders, but have specific angles on how each group is impacted and involved in each priority
2. Create communications that focus on retention and recruitment of personnel, residents, businesses, and other stakeholders	<ul style="list-style-type: none"> a) Create communications that focus on retention/recruitment for Westlake Academy parents b) Create communications that focus on retention/recruitment for Westlake Academy staff c) Create communications to keep residents engaged in Town activities d) Create communications that focus on corporate partner retention and recruitment
3. Host town hall meetings and forums	<ul style="list-style-type: none"> a) Hold town hall meetings and forums, including: <ul style="list-style-type: none"> ◦ Neighborhood meetings with residents, staff, and Council to discuss important issues facing the community ◦ Gatherings with Westlake Academy administrators and parents to discuss issues facing the school b) Hold homeowner’s associations (HOA) meetings with Town of Westlake representatives
4. Establish Town Council/Board of Trustees ambassadors	<ul style="list-style-type: none"> a) Ensure residents and stakeholders are informed about what is happening at Westlake Academy and around Town to serve as de facto communications team members b) Promote the use of “spread the word” community events using multi-communications channels

Priority E. Communication - Resident and Stakeholder Engagement

Goals	Strategies
5. Establish the “Westlake Together” initiative	<p>a) Promote key aspects of the Town, Westlake Academy, and corporate partners as one collective</p> <p>b) Ensure communication promotes alignment of the Town, Academy, and corporate partners, residents, etc., rather than separate features</p> <p>c) Create a “Westlake Together” campaign that highlights what makes the Town special</p> <p>d) Execute communications campaign for “moving past the guard gates” to show a united Westlake community</p>



Priority F. Public Safety

Description: Ensure a safe community through excellence in the delivery of fire, emergency management services, court, and police services.

Goals	Strategies
1. Ensure fire response capabilities align with the established standards	<ul style="list-style-type: none"> a) Track response times by service type b) Assess response times b) Implement improvements to operational readiness and effectiveness
2. Strengthen Firefighter and emergency medical service training	<ul style="list-style-type: none"> a) Increase hands-on skills training annually for each firefighter b) Complete task books for new firefighters, step-up Driver/Engineers, and step-up Captains c) Conduct quarterly simulation exercises for the National Fire Protection Agency (NFP) 1410 evolutions
3. Enhance emergency management education, tools and resources	<ul style="list-style-type: none"> a) Develop a robust emergency management education program to prepare personnel, community stakeholders, and residents for effective disaster response and recovery b) Align educational content with Federal Emergency Management Agency (FEMA) guidelines, National Incident Management System (NIMS) protocols, and industry best practices c) Offer courses through multiple platforms, including in-person workshops, virtual classes, and self-paced online modules
4. Ensure efficient court operations through the effective use of technology	<ul style="list-style-type: none"> a) Identify best practices among regional court operations and technology applications b) Research and recommend friendly online payment systems for courts
5. Ensure exceptional customer service by competent, skilled, and knowledgeable staff	<ul style="list-style-type: none"> a) Cross train personnel in municipal court functions b) Fund training of municipal court employees to improve court knowledge and promote customer service efficiency

Future of Westlake

The Strategic Plan will guide our community's growth and sustainability over the next seven years, building on our established tradition of inclusive and forward-thinking planning. This plan is informed by active public engagement and reflects our commitment to strategic development.

Central to our achievements is Westlake Academy, a testament to our ongoing dedication to educational excellence and innovation. Serving both local and broader communities, the Academy exemplifies our commitment to fostering positive changes and continuous improvement in our services and operations.

The strong tradition of strategic planning in Westlake is led by the Town Council and implemented by a dedicated team led by the Town Manager and comprised of the Westlake Academy, department heads, and staff. This Strategic Plan outlines the changes we aim to achieve and serves as a roadmap to the future, helping us to plan and adapt to financial and economic development challenges and opportunities using a refined approach. We will work from an Implementation Action Plan and department work plans, providing regular updates to the Town Council about key performance indicators and the use of resources. An annual review will be conducted at the beginning of the budget process each year to reaffirm our strategic priorities and goals that will drive decisions about resource allocation.

With this plan, the Town Council, leadership, and staff have been intentional about creating a document that truly connects the work of our offices and departments with overarching goals, initiatives, and strategies. This Strategic Plan does not shy away from the complexities of our shared community challenges. It embraces collaboration, connecting the work of multiple departments through a series of overarching strategies.



Future of Westlake

This 2025 to 2032 Strategic Plan is a dynamic guide for our organization and will serve as a framework for future conversations and decisions about how Westlake can continue to improve

service delivery and prepare for whatever the future holds. We look forward to continuing to serve you and the community, and to work with you to address the challenges and opportunities ahead. We would like to extend our sincere gratitude to our residents for their invaluable contributions to the development of the Strategic Plan. Your participation in surveys, attendance at focus group meetings, and investment of time and effort have been pivotal in shaping our strategies and vision. We also thank our dedicated leaders and community partners for their support and collaboration. Your efforts in providing guidance, resources, and expertise have been crucial in the successful formation of this plan. Our commitment remains steadfast in meeting your needs while delivering exceptional, responsive, and sustainable services.

We deeply appreciate all individuals who participated in surveys, attended focus group meetings, and invested their time and effort into shaping our strategy and vision in collaboration with our planning consultants. Your insights and dedication have been pivotal in the creation of this plan. We especially would like to thank our Town Manager, Town department heads and executives, Westlake Academy leaders, various Town and all other key personnel, community members and community partners. We would like to acknowledge our outstanding staff, whose dedication to serving the Westlake community is truly commendable. Your daily efforts in delivering high-quality services are the foundation of our success, and we are grateful for your continued service.



