



Strategic Plan FY2023-2027 Summary

February 15, 2023

Prepared by



Table of Contents

Introduction.....	3
Methodology.....	4
Foundational Statements.....	5
Mission.....	5
Vision.....	5
Organizational Values.....	5
Unified Teaching Values	5
Theory of Change Goals	7
Overarching Goal.....	7
Financial Health	7
Adaptive Capacity.....	7
Equity.....	8
Strategies.....	9
Programmatic Strategy	9
Staff Culture and Leadership Development Strategy	9
Board Development Strategy	10
Financial Strategy	10

Introduction

Community Music School of Springfield (CMSS) is a vibrant and trusted arts organization that is built upon addressing community needs and providing opportunities for music-making to people of all ages. Through our work on the Barr-Klarman Massachusetts Arts Initiative (BKMAI), CMSS created a Theory of Change (ToC) to guide our work toward building financial health, adaptive capacity, and equity in our organization. To build on and confirm the Theory of Change, CMSS embarked on a strategic planning process.

This document summarizes key findings and agreements of the planning work. It includes:

- **Methodology:** A description of the key milestones and participants in the process.
- **Foundational Statements:** Statements of mission, vision, and values refined during the process, as well as Unified Teaching Values articulated by faculty in the Effective Teaching Institute process
- **Theory of Change Goals:** The overarching goal and goals related to financial health, adaptive capacity, and equity as articulated in the BKMAI Theory of Change
- **Programmatic Strategy:** Prioritized strategies related to CMSS's programs
- **Staff Culture and Leadership Development Strategy:** A description of CMSS's staff culture and areas for improvement; and CMSS's intended approach to leadership development in preparation for eventual succession
- **Board Development Strategy:** Key priorities for the board
- **Financial Strategy:** Program-based financial analysis that includes an allocation of overhead and its implications

Methodology

The planning process began in July 2022 and was completed in January 2023. It was guided by the Strategic Planning Committee, made up of the following staff and board members:

- Vanessa Ford, Voice Faculty and Director of Trust Transfer and CultureRx
- Janine Idelson, Board Treasurer
- Marineh Kirakosyan, Piano Faculty
- Waleska Lugo-DeJesús, Board Vice President
- Rick Marshall, Percussion Faculty
- Eileen McCaffery, Executive Director
- Liz Simmons, Voice Faculty and Creative Aging and Bridge Leadership Program Manager
- Sierra Simmons, Associate Director
- Gregory Thomas, Board Member
- Joel Vengco, Board President

The Strategic Planning Committee convened four times over the course of the process. Julie Koo, Griffin Prieto, and Yuhan Zhang from TDC, a nonprofit consulting and research firm, were engaged to facilitate the process.

Key milestones in the process and the research were:

- **Current state analysis.** TDC prepared a report on the current state of CMSS's programs, operations, and financial condition. The report was presented in October 2022.
- **Market research.** TDC interviewed 30 stakeholders, including students, parents, educators, and partners in October 2022. Interviews investigated how CMSS's programs are making an impact in the community.
- **Planning retreat.** CMSS convened a Planning Retreat on November 18, 2022. Thirteen staff and faculty participated, along with six board members.
- **Program-based financial analysis.** TDC collaborated with CMSS finance staff to prepare profit and loss statements for four programs: Lessons and Classes, Sonido Musica, Prelude, and AMP. The analysis was presented in December 2022.

Foundational Statements

The Community Music School of Springfield has committed to the following statements of mission, vision, and values. The mission describes the organization's purpose, and the vision describes the intended impact on the community. CMSS's core beliefs are articulated through two lenses – the first is the organization as a whole and the second is the organization's approach to teaching.

Mission

To provide an equitable and inclusive center of excellence in music education, arts learning, and cultural engagement that empowers individuals, inspires creative passion, and promotes well-being in our community.

Vision

The Community Music School of Springfield envisions a community where:

- The power of music and the arts to educate, inspire, and transform lives is accessible to all.
- Music and arts education is accepted by all as essential for the development of the whole person and for the building of healthy communities.
- Individuals and families in Springfield and across the region can access spaces and places to connect through music and the arts.

Organizational Values

- **Equity & Excellence:** CMSS is dedicated to inclusion and social change through the arts, and celebrates all cultures and traditions. We create excellent programs and instruction to help all students achieve their highest potential. We are committed to supporting marginalized and under-represented individuals and groups in our community by providing significant levels of financial aid.
- **Creativity & Community:** We value the pursuit of lifelong learning, and we believe in the power of music to inspire achievement and create connections that strengthen individuals and create positive, systemic change in our communities.

Unified Teaching Values

Our purpose: We believe that our primary responsibility is to support the growth of every student's whole being through music and personal connection.

- **Relationships:** We prioritize our relationships with students, ensuring that they feel safe, comfortable, connected, and seen, so that they can take risks and grow.
- **Communication:** We observe our students with care, use thoughtful questioning to assess their learning, and communicate in developmentally appropriate ways to meet their learning needs.
- **Feedback:** We convey deliberate, honest, and kind feedback that strengthens areas of potential, identifies areas for attention, and uplifts the student.

- **Lesson Content:** We create a learning environment that balances creativity and fun with the goal of developing, retaining, and refining technical skills.
- **Adaptation:** We recognize that every learner is unique and respond by adapting the ways we share information and by using a variety of teaching tools.
- **Approach:** We provide structure and an organized approach while encouraging students to contribute their ideas, self-assess, and direct their own learning.

Our promise: We have made a commitment to ourselves, to our students, and to each other as teaching colleagues to pursue continuous learning to ensure that we are evolving, acquiring new teaching skills, and staying open to new ways of teaching.

Theory of Change Goals

CMSS identified the following goals in response to the BKMAI pillars for its Theory of Change. These goals remain relevant touchstones for our strategic plan.

Overarching Goal

The Community Music School of Springfield seeks to increase financial stability by funding a working capital fund and a facilities reserve by investing in our most impactful programs, developing programs to meet future community needs, and expanding our role as a place of creative expression that unites and builds trust among communities.

Financial Health

Goal: Create sufficient capitalization and liquidity for organizational adaptability and sustainability as evidenced by ability to fund a working capital fund and a facilities reserve on an ongoing basis.

Key Outcomes

1. Program business models are developed so that earned and contributed revenue targets are set based on an understanding of full cost of program delivery.
2. Reserves are consistently funded.
3. CMSS has working capital that funds liquidity needs in support of strategic choices, allowing us to deploy our resources toward programs that are most impactful in our community.
4. CMSS is prepared for a rainy day or economic downturn.
5. Drawdown on facilities reserve is tied to facilities needs assessment.
6. CMSS is able to plan in advance for large facilities projects that need lead time to secure funding.

Adaptive Capacity

Goal: Become a learning organization that evaluates, adapts, and responds to community needs.

Key Outcomes

1. CMSS deepens our impact on the community by improving current programs, expanding our most successful programs, and developing new programs in response to community needs.
2. CMSS faculty have clarity and agreement around the components and standards of excellent effective teaching, ensuring consistent delivery of the highest quality music instruction.
3. CMSS strategic planning process creates transparency and alignment around organizational goals and values between CMSS leadership, faculty and community.
4. CMSS strengthens and sustains our music in schools initiative and our programs serve as a replicable model for high impact creative youth development partnerships.
5. CMSS programs replicated in other communities
6. Increased racial and ethnic diversity is reflected in CMSS faculty, staff and Board.

7. CMSS expands access to music education through expanding virtual and off-site programming, serving as a model for remote arts education and increasing our student population and community impact without additional burden on our facility.

Equity

Goal: Expand CMSS's role as a place of creative expression that unites and builds trust among communities, pioneering new platforms for authentic cross-sector partnerships and programming to improve community health and wellbeing.

Key Outcomes

1. CMSS is integrated and trusted among historically marginalized communities, particularly Springfield's communities of color, providing clarity around needs or issues to be addressed. This enables us to help dismantle systems of oppression and make way for new systems that recognize and serve all members of our community.
2. CMSS's commitment to social justice and equity creates an environment where community members can connect across differences and develop positive relationships that lead to broader societal benefits.
3. CMSS fosters a community where music and arts education is accessible and considered essential for human development and healthy communities.
4. All CMSS partnerships reflect our partnership principles and our partners understand CMSS priorities and values.
5. CMSS supporters include a critical mass of people of color and Springfield residents.
6. CMSS staff and board have clear, shared articulation of CMSS' aspirational organizational culture and values.
7. Rationale for why justice and equity matter to CMSS' mission and guide our strategic direction is understood and owned across staff, board, donors, and partners, and detailed in strategic plan.
8. Staff at all levels and board include a critical mass of people who represent the constituencies most impacted by the issues we work to address
9. Equitable, inclusive policies for Board, staff and faculty are sustained beyond current leadership
10. CMSS shares information, successful platforms, and lessons learned in equity work to further dialogue, learning, and progress in our field

Strategies

The specific strategies and tactics included in the Theory of Change were evaluated, prioritized, and amended through the strategic planning process. They are presented in the plan as four key strategies:

Programmatic Strategy

CMSS offers a comprehensive span of programs in Music Instruction, Arts Integration, Creative Youth Development, and Community Wellness. Taken together, these programs provide a wide span of benefits to individual participants and to the community. CMSS has also built programmatic infrastructure that it deploys toward being a strong leader in the Greater Springfield community. In the coming five years, CMSS aims to implement a range of tactics that will support the achievement of the Theory of Change Goals for Financial Health, Adaptive Capacity, and Equity. Key tactics include:

- Strengthen skills of faculty, staff, and board, particularly in equity
- Align faculty recruitment, compensation, and evaluation with equity values
- Increase integration among programs
- Adjust pricing, contributed revenue, and enrollment goals to ensure that programs are covering full cost
- Continue to advance Community Wellness programs that engage creatives of color

Staff Culture and Leadership Development Strategy

CMSS identified staff culture and succession planning as key priorities for the coming years. These issues are intertwined. Successful succession will depend on future leaders understanding the positive culture that CMSS has cultivated over the past decade. To support that effort, the strategic planning process sought to identify the hallmarks of CMSS's culture that should be preserved as well as areas for improvement. CMSS has also developed an approach to leadership development that distributes key executive responsibilities, aiming to make the role of leading CMSS more sustainable.

Key Aspects of CMSS Culture

- **Human-Centered:** CMSS provides kindness and support to our staff and faculty, and sees them as people first.
- **Community:** Our committed, caring staff and faculty find joy in working together.
- **Openness and Opportunity:** CMSS supports our people to develop new ideas, grow as professionals, and improve our shared work.
- **Shared Vision for Impact:** Our people take pride in contributing toward our shared vision for community impact.

Areas for Improvement in CMSS Culture

- **Collaboration:** Increased opportunities for staff and faculty to integrate across programs and functions.

- **Communication:** Better communications among staff, faculty, and parents, and regular opportunities for CMSS to get feedback from constituents in the broader community.
- **Planning:** More advanced and proactive planning, and tracking against goals.
- **Equity:** Alignment of policies and practices with equity goals.

Leadership Development

CMSS will build on our efforts to deepen our bench of leadership, and work toward a Co-Executive Director model. In the coming five years, CMSS will cultivate the skills and experience of two Associate Directors, and test the idea of a shared approach to executive leadership.

Board Development Strategy

CMSS aims to ensure that all Board members are aligned with CMSS’s mission and vision, engaged with the strategic objectives of CMSS, and contributing to the fulfillment of the Board’s core responsibilities. To those ends, CMSS will pursue the following tactics:

- Re-energize Board Committees, including Governance, Marketing, Major Gifts, Community Partnerships, Planning, and Finance.
- Refine governance policies and procedures
- Proactively support CMSS programmatic and culture strategies
- Initiate a robust evaluation process for the Executive Director
- Initiate a robust self-evaluation process for board members

Financial Strategy

CMSS has considered three key aspects of its financial picture for the coming five years. First, the planning process resulted in an in-depth analysis of financial impact from four key programs: Music Instruction, Prelude, Sonido Musica, and AMP. CMSS aims to work toward a business model where these programs are covering their full costs. Second, CMSS has estimated financial investments needed to implement the high priority tactics in the Programmatic Strategy. Of this amount, about 40% of funds are already raised, and an additional 20% are expected to be generated through additional earned revenues. Third, CMSS has a roster of capital improvements that it plans to make over the coming five years, for which we have raised 30% of the necessary funds. Securing the needed resources to invest in the Programmatic Strategy and the capital improvements will be a key objective for the coming five years.