

CONSERVATORY LAB CHARTER SCHOOL
Strategic Plan
2019 – 2024

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Contents

School Mission.....3
School Vision3
Background5
Current State7
Goals and Strategies8
Appendix: Planning for Financial Sustainability17

School Mission

Conservatory Lab Charter School empowers a diverse range of children as scholars, artists and leaders through a unique and rigorous academic and music education. We enrich the larger community through performance, service and collaboration. As a laboratory school, we develop and disseminate innovative educational approaches that will positively impact children in other schools and programs.

School Vision

For over twenty years, the Conservatory Lab Charter School has been driven by its belief in the power of music and learning to transform the lives of its students and their families. With this new Strategic Plan, the School reaffirms this belief and its commitment to its three-part education model that weaves elements of two proven and exemplary programs – El Sistema and Expeditionary Learning – together with social and emotional learning and support. Taken together, this approach motivates and nurtures our students to become dedicated scholars, compassionate leaders and skilled musicians.

Five years from now, we will have achieved the following for our student and larger community:

- Continuous instructional improvement across all grades as measured by academic and artistic student outcomes. Student performance will inspire families and community confidence in our programs and their evident impact
- Faculty compensation offered at increasingly competitive levels to ensure the school's ability to recruit and retain a diverse and highly qualified staff
- A permanent upper school facility for grades 3-8 in the Uphams Corner neighborhood of Dorchester. The facility will offer our students and faculty the opportunity to pursue both academic and music education in appropriate and inspiring spaces.
- Our new performance and gathering spaces will serve the Uphams Corner neighborhood. They will be animated by working with the Center for Artistry and Scholarship as our outreach partner to deeply engage parents, community residents, and community-based organizations

Five years from now, we will have achieved the following with respect to our work as an educational laboratory:

- We will be a recognized leader in Pre-K- 8th grade education, and will serve as a model for new and existing schools across the nation that seek to integrate music, academics and social and emotional learning into their curricula
- Our educators will work with other schools' leaders, faculty members, and community members to develop a fusion of challenging and engaging academic, music/arts, and student support threads in their own schools
- We will lead a partnership with other public and charter schools, as well as Boston's arts colleges, to create a new K-12 arts pathway for Boston's public school students

- Our ongoing partnership with the Center for Artistry and Scholarship will help us to amplify what our school community has learned, and will continue to learn, through publications, conferences, school visits, professional development programs, and other dissemination activities

Background

The Conservatory Lab Charter School (CLCS) began its work to develop a new strategic plan for the school, for its dissemination arm, The Center for Artistry and Scholarship (CAS) in the fall of 2016, and for the Conservatory Lab Charter School Foundation (CLCSF) as a new school leadership team began its tenure. The planning committee, headed by two CLCS trustees, Dr. Lisa Wong and Martha Kleinman, included trustees from all three organizations to ensure close collaboration on issues of joint importance, as well as parents and faculty representatives.

The committee formally got underway in January 2017. A goal for the process was to be highly inclusive of the School's key stakeholders. Interviews, surveys of parents and faculty, and small group working sessions were utilized to identify key issues and set the agenda for the committee's consideration. In addition to a strong focus on student outcomes supported by instructional and system improvements, key issues included teacher and staff retention and compensation, the need for a permanent site for the upper school program, governance and the development of a long-range financial sustainability model. The committee's agenda also included questions related to the School's role as a laboratory, and its ongoing commitment to research, evaluation and dissemination of the School's model.

As the process unfolded, several issues emerged that required the committee's attention as well as the engagement of the full board and larger community. During 2017, the committee and board studied the potential of changing the School's charter status from that of a Commonwealth Charter School to that of a Horace Mann Charter School. This shift would have involved the Boston Public Schools inviting CLCS to join the district system. The purpose of this exploration was to assess whether this change could offer a potential path to more effectively supporting increased teacher compensation attractive to longer tenured and more diverse teachers, securing a permanent facility, and achieving greater long term financial sustainability. Ultimately, the shift in status was not pursued.

On a parallel path, the School entered into an investigation of various buildings and available sites to address the upper school's facility needs. Ultimately, the School's trustees entered into an agreement to secure a site in the Uphams Corner neighborhood, not far from the Lower School. The *Almost Home* Capital Campaign is currently underway with a goal to raise an additional \$3.4 million by the end of 2018.

Several of these issues were delegated to smaller subcommittees by the Joint Strategic Planning team, among these subcommittees were the School's professional leadership, the School Finance Committee, the CAS board, and the CLCS Foundation board. As the work of each of these subcommittees unfolded, it became clear that each of the entities---the School, the Center and the Foundation--- had their own significant agenda to accomplish over the coming five years. It also became clear that elements of these agendas may diverge, even while each is committed to an ongoing relationship among the three. Each of these teams were asked to produce individual plans that will be integrated at the appropriate intersection points. In the planning, the conclusion was reached that as each entity continues its work, the nature of the

relationship among the three will naturally evolve. The decision was made to create mechanisms among the three to ensure knowledge and progress sharing, and build unified language to make the evolving relationship clear to both internal and external stakeholders. The plan for each of the entities suggests a midpoint assessment and correction, if necessary, of the relationships over the course of the plans' implementations.

The document that follows is the five-year strategic plan for the School.

Current State

Enrollment

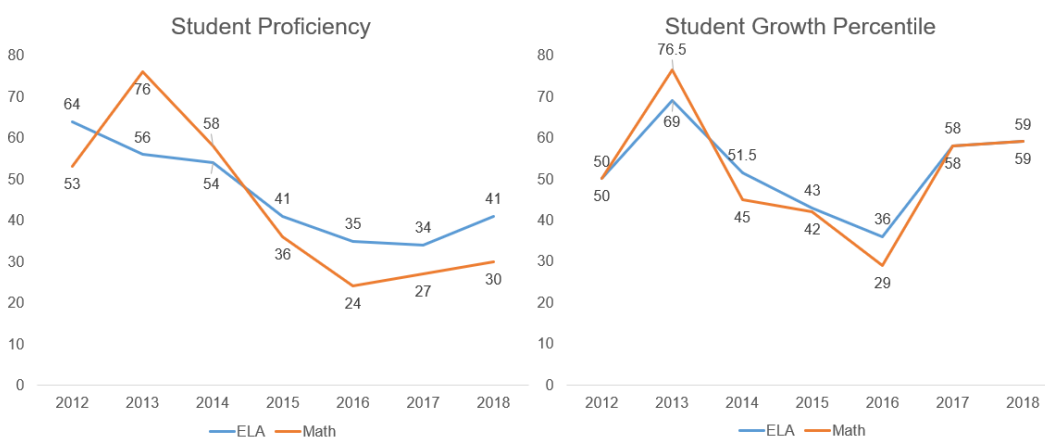
Conservatory Lab Charter School has experienced exponential growth over the last five years. In 2013, CLCS was located in Brighton with a total enrollment of 180 students. In four years, the School moved locations three times and increased enrollment to 450 students. During this time span the student demographics changed as well. In 2013, 63% of CLCS students were black or Hispanic. In 2017, 83% of CLCS students were black or Hispanic.

Staff

As CLCS grew, the number of educators more than doubled, growing from 30 FTE in 2013 to 77 FTEs in 2017. Initially, the new staff was comprised of younger educators. In 2016, 62% of staff were under the age of 33. Under the School's new leadership, only 43% of staff were under the age of 33. The School's new leadership has also made the staff more reflective of its changing student demographics. In 2013, only 22% of staff were black or Hispanic. In 2017, 40% of staff were black or Hispanic.

Assessments

Proficiency has seen an increase under new leadership, while student growth percentile, a measure of how students compare to their state-wide peers, has reached pre-expansion levels



*CLCS has take three different state assessments during this time: MCAS (2012 – 2014), PARCC (2014 – 2015), and MCAS 2.0 (2017 - 18)

Based on these 2018 Massachusetts Comprehensive Assessment System (MCAS) results, CLCS had the 2nd highest Stability and Growth Pact (SGP) in English Language Arts (ELA) when compared with the School's Boston charter peers, and the 4th highest SGP in math. The School did not fare as well in science proficiency, declining by several percentage points from the 2017 level. As we set the goals and strategies articulated in this plan, the entire CLCS team looks forward to continued progress in making this a great school for our students and families.

Goals and Strategies

For the next five years, the School will be guided by four broad goals and a set of supporting strategies:

Goal I: The Conservatory Lab Charter School will be among the top performing public charter schools in Massachusetts, as measured by student outcomes and retention, strong levels of family and community engagement, and a superb and committed faculty.

It should surprise no one that the core of this plan focuses on building the capacity to make continuous improvements in student outcomes. Four objectives support the goal of continuous improvement in teaching and learning. Each is supported by a set of key actions. These are outlined below:

1. Program and Curriculum Objective: Build student success academically, social-emotionally and creatively by continuing to strengthen the design and implementation of the three core strands of the CLCS program.

Actions:

- Articulate fully our PreK-8 curriculum, aligned to standards that provide authentic learning experiences connected to our local community
- Articulate fully our K-8 El Sistema curriculum aligned to the National Association for Music Education's (NAFME) music standards
- Articulate fully social-emotional learning at CLCS beginning in pre-kindergarten, through structures that build student ownership of learning such as CREW¹, student led conferences, habits of work and learning, and a culminating Gr. 8 capstone
- Engage families and students in building ownership of their learning and habits of work through the use of annual student-led conferences, culminating in 8th grade capstones for students to reflect on their learning
- Implement two fully developed and EL qualified expeditions/grade per year through collaborations across academic and arts staff
- Maintain and deepen our multi-tiered support systems across academics and social development for all students
- Design systems and faculty protocols to ensure that music and academics are authentically integrated across the grades
- Expand the science curriculum, including environmental science, to provide opportunities for students to connect learning to the local community
- Create service-learning opportunities that are integrated into expeditions and CREW
- Build nature-based, out-of-element activities for students

¹ CREW comes from the motto, "We are crew, not passengers," and derives from Expeditionary Learning. As noted above it is an approach to build student responsibility and ownership of their own learning. CLCS typically refers to it as CREW.

- Develop a structure for connecting students to summer enrichment activities
2. Middle School Objective: Create a compelling middle school experience that enhances student retention and supports students' transition to high school.

School demographics in grades 7 and 8, as well as parent surveys and conversations during the planning process, suggest that, like most middle schools in Boston, more needs to be done to make the CLCS middle school uniquely attractive in order to retain more of our PK-6 students and address the needs of newcomers beginning music in grades 7 and 8.

Actions:

- Create service-learning opportunities that are particular to the needs of middle school students
 - Build nature-based, out-of-element activities that are milestones for middle-school students
 - Develop a structure for connecting middle school students to summer enrichment activities and high school exploration
 - Develop more choice within the music offerings for Gr. 7-8 students that facilitate a range of access points to music for both returning and new students including peer-learning experiences
 - Incorporate performance opportunities for middle school students that tie to the 8th grade capstone projects
3. Family Engagement Objective: Ensure that families understand the CLCS model, have multiple ways to interact with teachers and administrators and, through conferences, events and various other touchpoints, have broad support to fulfill their role in student success.

Actions:

- Establish a multi-tier family engagement strategy to ensure families understand how all learners' needs are met, as well as the high school transition process
 - CREW leaders monitor student academic and artistic development, and build family relationships
 - Strengthen activities such as student-led conferences, classroom celebrations, and end-of-year capstone events to increase teacher-student-family connections
 - Expand our Family Action Network (FAN) to connect parents to other parents
4. Outcomes and Metrics: Specify target outcomes and related metrics for both student success and programmatic health.

Actions:

- Implement a full battery of assessments that support tracking student progress over time to diagnose needs and develop remediation strategies, and ensure alignment to standards
- Seek ways to partner with the State Department of Elementary and Secondary Education (DESE) to gather data on alumni matriculation in order to improve our capacity to measure outcomes over time
- Analyze attrition trends to determine their causes, and develop mitigation approaches to the negative impact of attrition on budget and student performance
- At the three-year mark, analyze middle school retention trends and corresponding financial outcomes to determine a long-term sustainability plan
 - Reach a conclusion as to whether the middle school program should continue as currently structured, be redesigned, or if the program should realign itself with another school

Goal II: Over the coming five years, the Conservatory Lab Charter School will meet its aspiration to be a “School for the Nation”:

1. Fulfilling Our Charter: CLCS will implement a variety of strategies and activities to support teachers, parents and school administrators and others, locally, nationally and internationally, to understand and utilize all or key elements of its three-part model.

Actions:

- Through CAS, the School will continue to initiate ongoing research, evaluation and documentation of the elements of the model. Well-evaluated, best practices will be disseminated through publications, conference presentations and our many community-based, educational and arts collaborators
 - Through CAS, evaluate the opportunities and resources necessary to actively support districts that wish to develop schools similar to CLCS
 - The partnership will be evaluated annually, at both the staff and trustee levels, to assess its continued efficacy for both parties over the five years of the plan
2. Community Relationship: CLCS will cement its relationship with the Uphams Corner community, leveraging its new facility and CAS’ capacity to function as the School’s community face

Actions:

- Position CAS as the outreach arm from the School to the local neighborhood, through activities such as regular annual community performances and partnerships with other local arts organizations
 - Create, assess, and refine annual objectives and budgets for community outreach activities based upon their success
3. Pathways: CLCS will seek opportunities to both lead and partner with others to bring the vision of a PK-12 music/arts pathway for Boston’s students to reality.

Actions:

- The School will work with CAS to develop and convene a working group of Boston’s arts education leaders for ideation and evaluation of pathway scenarios
- The School will collaborate with CAS and the working group to test scenarios with parents and potential funders

Goal III: Our school will strengthen its key organizational structures, operations and systems, as well as its relationship to key partners

1. Faculty and Leadership Objectives: Attract, retain, and support faculty and leaders with the passion, commitment and expertise to refine and implement the CLCS model on behalf of the School's diverse student body.

Actions:

- Provide regular professional learning opportunities weekly during the school year, and for a minimum of one week during the summer months for returning teachers plus additional time as needed for new teachers
- Assure a high portion of professional learning activities and one-on-ones with supervisors include observation and feedback opportunities
- Ensure presence of lead teachers with deep experience and mentorship aptitude in literacy, math, science and the arts
- Provide support to Resident Artists in mastery, content and teaching models
- Commit to a clear salary schedule competitive with the highest-paying Boston charters
- Ensure regular one-on-ones with supervisors and annual goal setting reviews
- Support, supervise and place student-teachers in all grades in both academic subjects and music
- Deepen the School's student-teacher program and university partnership

2. Middle School: Assess retention trends in the middle school at the midpoint of the plan to reach a decision about the school's grade structure.

Actions:

- Gather data through surveys and individual conversations annually regarding parents' plans for fifth grade students with respect to intent to remain through middle school
- Monitor retention as new middle school experiences are implemented; assess impact of changes
- Organize an internal task force, comprised of board and staff to review annual data and assess progress on the development of K-12 Arts Pathway
- Set the midpoint of this plan to reflect on and come to a decision on maintaining or redefining the middle school program or realigning the program with another school

3. Administration: CLCS will evolve its administrative team to ensure appropriate skills and adequate capacity are present within an efficient cost framework.

Actions:

- Reconfigure the administrative team over the first three years of this plan to streamline key functions, support the School’s changing needs in the context of a new facility and an increasingly experienced faculty.
- Strengthen internal financial oversight and control
- Build fundraising capacity in partnership with the CLCS Foundation
- Consider the feasibility of transitioning to an internal executive director as a part of the evolution in administrative structure

4. Center for Artistry and Scholarship: Continue to work in close operational partnership with CAS for leadership, dissemination, and administrative support

Actions:

- Clarify partnership arrangements with CAS through SY2020-2021
- Work with CAS to develop annual documentation and dissemination objectives for the CLCS model through SY2020-2021
- Establish clear community engagement objectives for inclusion in partnership agreements
- Work in collaboration with CAS in considering an executive director transition plan
- Over the life of the plan, regularly evaluate the structure, scope, and effectiveness of the relationship
- Utilize the newly established coordinating group (see Governance and Structure below) to monitor the relationship and make adjustments as needed

5. Governance and Structure: CLCS will work collaboratively with the CAS and Foundation boards to improve internal transparency and communication among and across each partnering organization.

Actions:

- Establish and maintain a “coordinating group” of designated trustees across the three collaborating organizations to constantly evaluate the needs, the current state, and the trajectory of each; proactively plan for needed changes to structures, finances or processes that support the work
 - Clarify the roles and responsibilities of trustees serving on the coordinating group with respect to regular participation and communication
- Clarify roles and responsibilities with the Foundation board, with a particular focus on fund-raising
- Monitor progress against the goals of this plan annually

- Build a pipeline of future board members to ensure strength and a range of skills and perspectives on the CLCS board
- Nurture prospective leaders to assume critical roles as officers and committee chairs
- Ensure regular board succession in keeping with best practice
- Create an emeritus group to maintain relationships with long-term retiring board members, friends, and supporters

Goal IV: CLCS will ensure financial sustainability by refining its financial model, management, and fund-raising strategies to optimally balance investment in leadership, faculty, program, and facilities in an evolving context²

1. Financial model: The Finance Committee, school leadership and Board of Trustees will regularly assess and refine the CLCS financial model to ensure its long-term strength.

Actions

- Refine cost structure and fund-raising targets to balance leadership needs, faculty compensation, and occupancy costs once the financing for the new facility has been finalized
 - Build reserves through a combination of the capital campaign and operating surpluses to support the maintenance of both the new and existing facilities and ensure the School has an operating cushion
2. Financial management: Upgrade the School's financial administration structure, capacity, and transparency to support all stakeholders.

Actions:

- Create a shared in-house finance team to support school leadership and management of all three entities (School, Center and Foundation) and their points of intersection
 - Increase frequency and clarity of financial reporting to ensure the Board has a full understanding of the School's annual financial performance against budget goals, and the financial implications of the relationships with CAS and the CLCS Foundation
3. Fund-raising administration: Maintain a strong and energetic shared fund-raising infrastructure and management that can support the School's annual operating and capital needs.

Actions:

- Work in partnership with CAS and the Foundation to form the fund-raising team
- Partner with the Foundation as it builds its board into an effective fundraising board within the first two years of this plan
- Execute and successfully complete the Capital Campaign, and seek funding to support ongoing capital requirements
- Establish clear financial targets for the annual fund
- Clearly articulate a targeted fundraising strategy and action plan to support the School's outreach and dissemination, and community engagement work

² See the Appendix to this plan for memo regarding the school's sustainability planning going forward.

- Leverage the School's staff and trustee leadership in support of fundraising outreach and presentations on a regular basis

Appendix: Planning for Financial Sustainability

Background

Over the course of strategic planning, Conservatory Lab's leadership has come to agreement on its broad financial priorities, which include:

- Financing a new building
- Investing in faculty salaries
- Preserving and advancing its unique model
- Sharing learning to benefit teachers and students beyond the walls of the school

Until the current Director of Finance was hired in 2018, responsibility for the school's financial strategy was shared by members of the board and an external contractor. With the aid of a financial consultant, a multi-year financial model was created to assist in financial planning, including the financing of a potential new building. More recently, additional external consultants were involved as parts of the strategic planning process, which led to the creation of a set of alternative models in order to analyze critical questions about the school's financial future. These questions include affordability of the new facility, faculty structure and compensation scenarios, and the financial relationship between the school, the foundation, and the Center for Artistry and Scholarship.

At this juncture, the various models agree that the school can reasonably expect to have the means to finance its new building and continue to fund its operations. However, depending on what assumptions are made about future tuition rates, fundraising and cost escalations, they can differ in important ways. As such, there is not a fully shared view as to how the school can simultaneously invest in faculty salaries, preserve all aspects of the model, and actively disseminate what it is learning.

Financial Sustainability Working Group

The next step in the process is for a board Working Group to work with the new Director of Finance to come to agreement on a single multi-year view of the school's financial trajectory that will be shared and understood by the full board. To accomplish this, the group will work to resolve discrepancies among the key input assumptions of the existing models. The most important issues that must be agreed upon to create a rational model are detailed below.

- **Public revenue growth rate assumptions:** The School has limited control over the large majority of its revenue, which comes from state and federal sources. As such, its forward-looking financial planning must include reasonable revenue assumptions grounded in an understanding of past experience and the budget climate at the various public entities that fund the School.
- **Annual fundraising:** Fundraising is the only source of revenue that the School can influence directly. Donor support is contingent on cultivation, ambition, and the School's success. Growing annual fund revenue during a capital campaign is notoriously difficult, and the Foundation's Director of Development position is vacant. Looking ahead, the School must strive for a fundraising target that it believes is attainable.
- **Faculty Structure and Salary Levels:** Headcount and salaries are the School's biggest expense. The School desires to add experienced teachers and to grow salaries to a level comparable to

the top decile of Boston charters. Recently, some progress has been made on this front; the financial model must reflect a shared definition of success and articulate the tradeoffs that will be required to achieve it.

- **Administrative Structure and Headcount:** The school's administrative overhead is high compared to peers. The unified model must reflect shared assumptions about needed positions and salaries.
- **Facility Rent, Debt Service, and Occupancy:** Once the school agrees to financing terms for the new building, it no longer has the ability to adjust this expense. The financial model must reflect the required debt service, along with reasonable operating costs for the new facility.
- **CAS Services:** The School has close relationships with the CLCS Foundation and the Center for Artistry and Scholarship. The Foundation has chosen to make grants to CAS to help support its mission to foster and mobilize leadership and support for creative arts-immersed schools. These grants allow CAS to aid the School's Board in providing essential leadership support to the School as well as its research and dissemination activities. The Foundation must either raise funds or draw from reserves to cover these grants. The School's financial model must indicate how the Foundation's plans for the future will impact the nature of these relationships going forward.
- **Reserves and Capital Maintenance:** The school's new building requires a significant capital investment that will be funded in part by drawing down existing reserves. To manage operating risk and care for its building, the School will need operating reserves and a strategy to fund capital maintenance. These must be reflected in the unified model.

Conclusion

The school anticipates that the financing terms for the new facility will be finalized during fall 2018. With those numbers in hand, the Working Group will have the information needed to accomplish the financial planning objectives outlined above. Board leadership fully recognizes the urgency of completing this work, and is committed to pressing forward to illuminate the path to financial sustainability.