

Equity, Diversity and Inclusion Self-Assessment Questionnaire for Orchestras

Section 1: Key Indicators

The first of our four sets of questions helps you to collate information about key actions or steps your organization may have taken in your EDI conversations and action so far, and to identify helpful steps for the future.

Demographics

In the past three years, my orchestra has collected the demographics of our:

	No	Yes	I don't know
Staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Musicians	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conductor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Soloists	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Programmed Composers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Volunteers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Audience (paid)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Audience (free)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wider community beyond our current audiences	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Advancing the Orchestral Experience for All

Were any of these demographics **self-reported** by the individuals themselves, rather than assigned or estimated by someone else?

No

Yes

Please respond to the following statements as they relate to your organization:

Do you have an active DEI Committee/Council/Task Force of any type? (this could be a board or musician committee, a staff task force, a community partnership group, or any other type of regular convening focused on DEI discussions or work)

- We have not considered forming a DEI committee of any type
- We have considered, but not moved forward with, forming a DEI committee (of any type)
- We formed a DEI committee (of any type), but it is no longer active
- We formed a DEI committee (of any type), but its work is largely independent of that of our staff and / or board
- We formed a DEI committee (of any type), and its work is integrated with that of our staff and / or board

Advancing the Orchestral Experience for All

Who serves/served on the committee? (check all that apply)

- Board members
- Community Partners
- Conductors / Artistic Staff
- Funders
- Musicians
- Staff
- Volunteers
- Other external stakeholders
- Other) _____
- I don't know

Do you have a formal DEI plan?

- We have not considered creating a formal diversity, equity, and inclusion plan of any type
- We have considered, but not moved forward, creating a formal diversity, equity, and inclusion plan
- We have created a formal diversity, equity, and inclusion plan (of any type)
- We created a formal diversity, equity, and inclusion plan, and re-assessing the plan is a regular, on-going part of our work

Advancing the Orchestral Experience for All

Was the plan developed with external support or guidance?

- No
- Yes

Are you working to align your organization's mission statement with its commitment to DEI?

- We don't have a mission statement
- We have not considered re-assessing our organization's mission statement to determine alignment with an organizational commitment to DEI
- We have considered, but not moved forward on, re-assessing our organization's mission statement, to determine alignment with an organizational commitment to DEI
- We have re-assessed our organization's mission statement, to determine alignment with an organizational commitment to DEI
- Re-assessment of our organization's mission statement for alignment with an organizational commitment on DEI is a regular, ongoing part of our work

Page Break

Advancing the Orchestral Experience for All

Are you working to align your organization's culture with its commitment to DEI?

- We have not considered inclusion, or how our organization's culture could change in order to make it more inclusive
- We have considered inclusion, and how our organization's culture could change in order to make it more inclusive
- We have defined inclusion, discussed best practices, and are making progress towards becoming more inclusive
- We have conducted an organizational culture assessment, as part of this work
- We have internalized an understanding of inclusion, and work to be mindful of inclusion in all our orchestra's decision-making

Have you begun to consider or address the role played by unconscious bias in your organization's work?

- We have not discussed the role that unconscious bias might play in our organization
- We have recognized that unconscious bias influences our organization's work, but have not yet taken any steps to address this
- We have recognized that unconscious bias influences our organization's work, and have taken steps to learn how to manage it
- We have undertaken organizational bias training or consultancy
- Bias management practices are consistently applied across our organization

Advancing the Orchestral Experience for All

Staff HR Policies and Practices:

- We have not considered reviewing our staff HR (recruitment and retention) policies and/or practices within the context of DEI
- We have considered, but not moved forward on, reviewing our HR policies and/or practices within the context of DEI
- We have reviewed our staff HR policies and/or practices within the context of DEI
- I don't know

Musician HR Policies and Practices:

- We have not considered reviewing our musician HR (recruitment, audition and retention) policies and/or practices within the context of DEI
- We have considered, but not moved forward on, reviewing our musician HR (recruitment, audition and retention) policies and/or practices within the context of DEI
- We have reviewed our musician HR (recruitment, audition and retention) policies and/or practices within the context of DEI

Artist and Repertoire Programming:

- We have not considered reviewing our music programming policies and/or practices within the context of DEI
- We have considered, but not moved forward on, reviewing our music programming policies and/or practices within the context of DEI
- We have reviewed our music programming policies and/or practices within the context of DEI
- We have made changes to our music programming policies and/or practices within the context of DEI

Advancing the Orchestral Experience for All

Has your organization built connections to networks or organizations that help you to identify, cultivate, recruit, and retain ALAANA (African, Latinx, Asian, Arab, and Native American) individuals?

	No	To some extent	Yes	I don't know
Staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Musicians	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conductors / Music Director / Artistic Directors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Volunteers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Soloists	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Advancing the Orchestral Experience for All

Does your organization offer specific programs or processes to support diversity, equity, and inclusion in the workplace? Please select all that apply.

- Peer mentoring
- Musician fellowship program for one musician
- Musician fellowship program for more than one musician
- DEI considerations built into staff recruitment, orientation, and exit processes
- DEI considerations built into board recruitment, orientation, and exit processes?
- Other (please specify) _____

Does your organization assess the outcomes of your DEI efforts and learning in any way?

- No
- To some extent
- Yes

Does your organization share the stories of your DEI efforts and learnings in any way?

- No
- To some extent
- Yes

Section 2: Challenges

This section helps you to consider **learning challenges** your organization may face in the context of advancing its DEI conversations and actions:

	1	2	3	4	5
Lack of shared vocabulary and ability to talk about DEI topics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of understanding of why DEI is important to the health of the organization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of knowledge about best practices and pitfalls in DEI work within the orchestra field	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please rate the following **resource challenges** your organization faces in the context of advancing its DEI conversations and actions:

(note: a score of 1 indicates that your organization is not at all challenged in this area; a score of 3 indicates that your organization is highly challenged in this area).

	1	2	3
Lack of staff time/resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of available financial resources/lack of fundraising opportunity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of “head and heart space” (the mental and emotional space necessary to advance this work)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Advancing the Orchestral Experience for All

Please rate the following engagement challenges your organization faces in the context of advancing its DEI conversations and actions:

(note: a score of 1 indicates that your organization is not at all challenged in this area; a score of 5 indicates that your organization is highly challenged in this area).

Advancing the Orchestral Experience for All

	1	2	3	4	5
Limited / lack of leadership from CEO	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Limited / lack of leadership from Board Chair	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Limited / lack of board buy-in	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Limited / lack of musician buy-in	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Limited / lack of staff buy-in	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Limited / lack of conductor/Music Director/Artistic Director buy-in	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Limited / lack of volunteer buy-in	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
DEI responsibility centered in one department, and not shared by the entire organization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A sense of fatigue around the topic of DEI	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Advancing the Orchestral Experience for All

Please rate the following **challenges in implementing** your organization's DEI conversations and actions:

(note: a score of 1 indicates that your organization is not at all challenged in this area; a score of 5 indicates that your organization is highly challenged in this area).

	1	2	3	4	5
Difficulty translating intent into strategy- we don't know how or where to start this work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Difficulty translating strategy into action- we have a plan but we can't execute it	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The scope of our Collective Bargaining Agreement (CBA)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of strong relationships with community organizations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Difficulty fundraising for programmatic DEI work (e.g. commissions, programs to support ALAANA musicians)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Difficulty fundraising for non-programmatic DEI work (e.g. partnership development, organizational learning and development)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Difficulty identifying appropriate external specialists to support and guide the process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What do you believe is most holding your orchestra back from DEI conversations and actions?

Section 3: Needs

This final section of the questionnaire helps you to consider resources that could be helpful for advancing your organization's DEI conversations and action.

How helpful would **external consultancy support** be in the following areas? (1=not helpful, 5=very helpful)

	1	2	3	4	5
A "first steps in DEI" program, exploring the basics of DEI language and examples of how DEI work could apply to your orchestra	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Relating DEI topics (such as implicit bias training, anti-racism training, power and privilege etc.) to your organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Internal assessment, DEI planning, and alignment of DEI work with the long-term strategic goals of your orchestra	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Building momentum, setting expectations, and increasing the priority level around DEI work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Building internal capacity for listening (i.e. training in how to start and sustain the DEI conversation within your orchestra)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Building greater capacity to create and sustain strong community relationships	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Building greater capacity to evaluate and learn from your organization's current DEI programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Building a professional development pathway for future staff and board members of color	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coaching for staff and board leadership	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Advancing the Orchestral Experience for All

Please rate the following **other potential resources** for advancing your organization's DEI work.
(1=not helpful, 5=very helpful)

	1	2	3	4	5
Toolkit resources (written best practices and “how to” guides around DEI work)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Case studies (descriptions of how other orchestras have successfully led DEI work and navigated through major DEI challenges and mistakes)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hiring and retention resources (best practices in attracting, hiring, and retaining ALAANA staff, and attracting and retaining board members)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Learning and development activities around general DEI topics (such as implicit bias training, anti-racism training, implicit bias, etc.) to your organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Resources for programming repertoire by ALAANA composers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Resources for identifying and engaging ALAANA guest artists	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Resources for identifying and engaging ALAANA conductors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
National affinity groups (groups for people who identify as sharing a common element of their identity or background)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A field-wide vision for DEI work and associated indicators of success (<i>where should the field be going / what are our shared DEI goals, and how do we assess DEI progress, both nationally and at individual orchestras?</i>)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>