Pathways to Equitable and Inclusive Orchestras

Facilitator:
Harold Brown, Chief Diversity and Inclusion Officer, Cincinnati Symphony

Speaker:
Heather Briere, Director, Learning & Leadership Programs, League of American Orchestras

Panelists:
Helen Cha-Pyo, Artistic Director & Principal Conductor, New Jersey Youth Symphony
Marianne Rice, Vice President of Music Education & DEI Initiatives, Jacksonville Symphony
Dana Stone, Executive Director, Indianapolis Chamber Orchestra
Welcome and What’s Ahead

• Welcome and Why EDI Matters
• The League’s Commitment to EDI
• The Catalyst Fund Program and Resources for All
• Grantee Stories of Vision, Progress, and Lessons Learned
• Explore EDI Strategies and Challenges in Small Groups
• Closing Thoughts
• Gallery Walk
Accelerating the Pace of Change in EDI

• The League is committed to threading the values of EDI throughout its work, with the ultimate goal that the field reflects and embodies the diversity of this country.

• The League provides orchestras with resources that support the building of diverse organizations and inclusive cultures.
Via the Catalyst Fund, the League:

- Builds understanding and competence in EDI practice
- Deepens impact across the field by building a robust network of individuals with shared experience and purpose
- Identifies and supports field leaders in EDI practice
ACCELERATING THE PACE OF CHANGE IN EDI

Over $4,000,000 Investment

6 Years
Catalyst Pilot (2019-2022)
Catalyst Incubator (2022-2025)

50+ EDI Consultants
Now have experience partnering with orchestras

65 Grantee Orchestras
From the largest to the smallest budget professional, chamber, and youth orchestras from diverse communities across the country

250+ Active Members of the Catalyst Community
Leaders in growing EDI practice in orchestras

5 Publications
• Promising Practices: Actions Orchestras Can Take To Make Progress Toward Equity (2022)
• Catalyst Snapshots: EDI Case Studies from American Orchestras (2022)
• Equity, Diversity, and Inclusion in Artistic Planning (2023)
• 2 Future Publications
Catalyst Projects

- Learning and skills development activities for staff, board, and musicians to clarify and align their strategic thinking on EDI issues
- Conducting an institutional EDI audit
- Creating formal plans, policies and implementation towards the orchestra’s EDI vision
- Developing recruiting, hiring, and training practices and materials
- Overhauling communications, marketing, and ticketing strategies
- Evaluating, benchmarking, and measuring progress
Catalyst Guiding Values

- **Humility**, acknowledging that answers can be elusive and uncomfortable, but entering into the work of EDI with openness, objectivity, and deep institutional commitment.

- **Transparency**, defined as clear communication across stakeholders and being frank about successes and challenges in becoming equitable institutions.

- **Authenticity**, realizing that EDI is a sustained practice that eschew tokenism and instead embed equity across the institution.
Grantee Stories of Vision, Progress, and Lessons Learned

• **Helen Cha-Pyo**, Artistic Director & Principal Conductor, New Jersey Youth Symphony

• **Marianne Rice**, Vice President of Music Education & DEI Initiatives, Jacksonville Symphony

• **Dana Stone**, Executive Director, Indianapolis Chamber Orchestra

• **Harold Brown**, Chief Diversity and Inclusion Officer, Cincinnati Symphony
About the ICO & Indy

- Population – 2 million
- ICO Budget - $980,000
- Full-time staff – 3
- Board of Directors – 21
- Union Orchestra – Core 32
- 7 subscription concerts plus education, parks concerts
The Early Journey

Early 2020 – Strategic plan acknowledges need for expanded work in DEI

Fall 2020 – DEI Committee formed, Info-sessions with stakeholders in BIPOC Community

Spring 2021 – DEI Consultant, Board & Staff Training

Fall 2021 – Catalyst Fund Application
Early Reflections

• Evaluating a Starting Point
  • Assess and monitor existing practices, programs
  • Where are we now?
  • How can we measure progress

• Recognizing & Celebrating
  • Highlighting current programs, artists, concerts, composers
  • Talking about our vision and bringing the work forward

• Collective Buy-In
  • Large group discussions for idea sharing
  • Brainstorming leaders, partners, & cheerleaders
Goal 1: Establish organizational policies and practices to reinforce ICO’s commitment to diversity, equity, and inclusion.

Goal 2: Build a Board of Directors reflective of the community.

Goal 3: Build an orchestra comprised of an increasing number of qualified musicians who are African American or from other underrepresented demographic groups.
**Goal 4:** Create concert seasons that include a diverse array of classical musical experiences.

**Goal 5:** Conduct meaningful community engagement activities and educational programs that reach diverse populations.

**Goal 6:** Increase ICO support for people and organizations from populations underserved by the ICO.
<table>
<thead>
<tr>
<th>Action Item</th>
<th>Status</th>
<th>Who</th>
<th>When</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create an equity plan with quantifiable measurements to evaluate progress.</td>
<td>g/y</td>
<td>Susan</td>
<td>2022</td>
<td>To be discussed/approved at upcoming DEI meeting</td>
</tr>
<tr>
<td>Build knowledge about community assets and map potential partners and allies to support DEI efforts.</td>
<td>y</td>
<td>Dana</td>
<td>On-going</td>
<td>With input from others</td>
</tr>
<tr>
<td>Conduct training for musicians and all Board/Staff to have yet to participate in an ICO DEI session.</td>
<td>y</td>
<td>Susan</td>
<td>TBD</td>
<td>Musicians' held, Board/Staff not yet</td>
</tr>
<tr>
<td>View hiring practices to identify barriers to inclusion.</td>
<td>y</td>
<td>Dana</td>
<td></td>
<td>Examined in recent hiring processes</td>
</tr>
<tr>
<td>Include at least 2 BIPOC staff in ICO Administrative staff. If relevant, seek BIPOC candidates for open positions.</td>
<td>g</td>
<td>Dana</td>
<td></td>
<td>Joshua Thompson - Priscille Michel - Teri Ayaan Abassi - sur</td>
</tr>
<tr>
<td>Map BIPOC vendors and establish meaningful increase goal for year 2.</td>
<td>y</td>
<td>Dana</td>
<td></td>
<td>seek catering options! Percentage use of suppliers: $ spent ($4000-897)</td>
</tr>
<tr>
<td>Build a wish list of DEI-focused projects to raise at least $15,000.</td>
<td>g</td>
<td>Jessie, Dana</td>
<td>Oct 31</td>
<td>i.e., Anne Frank Treas. Commission, Josh building comm. This is building community</td>
</tr>
<tr>
<td>Develop a DEI initiative that can be submitted to donors and foundations in Year 2.</td>
<td>y</td>
<td>Jessie</td>
<td></td>
<td>Building community</td>
</tr>
<tr>
<td>Rouse language and visuals used in collateral materials to reflect emphasis on inclusion.</td>
<td>g</td>
<td>Dana</td>
<td></td>
<td>Social &amp; Print &amp; web. Intentional publicity over diversity partners, musicians, (Black, LGBTQ, Gender)</td>
</tr>
<tr>
<td>Create talking points for ICO internal stakeholders communicate ICO's DEI position.</td>
<td>g</td>
<td>Dana</td>
<td></td>
<td>Created for diversity recruiting.</td>
</tr>
</tbody>
</table>

**Monitoring Table**

- Each Goal has multiple action items
- Status based on stoplight system
Successes

- **GOAL 1 Organizational**
  - Map BIPOC vendors and establish meaningful increase goal for year 2.
  
  RESULT – an increase in dollars spent from $34,000 - $89,000 year 0 to year 1
  15 vendors – 29 vendors year 0 to year 1

- **GOAL 2 Board**
  - Result 100% improvement in BIPOC

- **GOAL 3 - Musicians**
  
  - Increase number of BIPOC musicians on active sub list to at least 15% by YR1.
  
  - Establish a proposal with other part time orchestras for a joint fellowship. Partner with Sphinx.
Successes

• GOAL 4 Programming
  • Have at least 5 guest performers/conductors/composers from underrepresented populations in Year 1 and 7 in Year 2.

• GOAL 5 Community Engagement
  • Establish contact with at least 6 new potential partners.

• GOAL 3 – Community Presence
  • ICO leadership will attend at least 2 new high-profile events in the African American Community.
Hindsight
Things we would do differently

• Communications System
  • Keep musicians in the loop of the work of the committee and board
  • Frequency of Invitations to musicians to participate

• Musician Training
  • Begin with collective Buy-In, before a formalized training
  • Although all our musicians were invited only 2 participated
  • Go to them instead of hoping they come to you.
  • TRANSPARENCY
The ICO is committed to increase inclusion, diversity, equity and access in all aspects of the organization and strives to be a leader among non-profit performing arts organizations. Toward this goal, we will establish policies, procedures and training programs, pursue specific initiatives and commit significant resources. This policy is closely aligned with our long-term strategic plan.

Inclusion, diversity, equity and access is closely connected to our mission of offering music for the small orchestra to everybody in the community, including those who might have had little exposure to classical music in their lives. We commit to explore any underlying, unquestioned assumptions in our organization that prevent us from reaching these goals. The Executive Director and Music Director are expected to be visible leaders for achieving diversity and inclusion for the organization.
Land Acknowledgement Statement

We acknowledge that we gather here at Butler University on the traditional land of indigenous peoples including the Potawatomi, Miami, Delaware, and Shawnee.

We honor with gratitude the land itself and the indigenous peoples past and present who have stewarded it throughout the generations. This calls us to commit to continuing to learn how to be better stewards of the land we inhabit, while also acknowledging that some were brought to this land not by choice.
Get Connected with the ICO!
CSO VISION:

To be the most relevant orchestra in America

CSO MISSION:

To seek and share inspiration
WHY Diversity, Equity & Inclusion (DEI)?

- Fulfilling the Vision
- Moral imperative
- Artistic richness, variety
- Representation
- Business case
CSO Strategic Plan Goals

GOAL 1
Evolve how we present ourselves to excite 21\textsuperscript{st} century audiences.

GOAL 2
Optimize organizational culture and performance to ensure our ability to inspire our community.

GOAL 3
Reflect and welcome the diversity of our community on our stage, in our audiences, in our offices and on our Board.
CSO Strategic Plan Goal 3

Reflect and welcome the diversity of our community on our stage, in our audiences, in our offices and on our Board.

**Objective 8:** Increase the diversity of our audiences to better reflect the demographics of the Cincinnati MSA.  
*Primary Owner: VP of Marketing*

**Objective 9:** Lead the American orchestra field in representation of gender and racial/ethnic diversity for musicians on stage.  
*Primary Owner: VP of Orchestra & Production*

**Objective 10:** Increase the diversity of guest artists and composers represented across all Orchestra performances.  
*Primary Owner: VP of Artistic Planning*
CSO Strategic Plan Goal 3

*Reflect and welcome the diversity of our community on our stage, in our audiences, in our offices and on our Board.*

**Objective 11:** Diversify *Staff, Board and Volunteer base* to reflect the demographics of the Cincinnati MSA.
*Primary Owner: VP of HR*

**Objective 12:** Complete and adopt *Learning Department Strategic Plan*; incorporate and implement all new and revised programs and initiatives, accordingly.
*Primary Owner: Director of Learning*

**Objective 13:** Launch meaningful *Community Engagement activities and performances*, with a focus on cross-sector collaborations and new relationships with community and cultural organizations in underrepresented neighborhoods.
*Primary Owner: Director of Community Engagement & Diversity*
Breakout Group Conversations: EDI Strategies and Challenges

- Importance of EDI Consultants
- Measuring Progress
- Developing External Alliances and Partnerships
- Reconciling Differences and Building Consensus
### Breakout Group Notes: Importance of EDI Consultants

#### Successes
- Strategic Planning with Consultant(s)
- Trainings (Led by a Different Consultant)
- EDI Audit

#### Challenges
- Securing Funding
- Staff-Driven Initiative to Convince the Board of the Importance of Hiring a Consultant
- EDI Committee: Getting Representatives from Every Department (Executive Director, Operations, etc.)
- Building Relationships with 1-2 Passionate Board Members to Partner
- EDI Audit
Breakout Group Notes: Measuring Progress

**Successes**
- Self-Reported Demographic Data
- Increased Response Rate
- Consistent Surveys
- Increased Social Acceptance for Fellows
- More Board/Staff Conversations
- Self-Reported Increase in Belonging

**Challenges**
- Investing in Better Data
- Limited Survey Responses
- More Methods than Surveys
- Staff Resources – Limited Time
- Measuring Audience Demographics
- Politics
- Too Much, Too Soon
- Fear
Breakout Group Notes: Developing External Alliances and Partnerships

**Successes**
- Educational Organizations
- Chambers of Commerce (i.e. Black and Latino)
- Sports
- Festivals
- Faith-Based Activities
- Afro-Cuban
- Indigenous
- Community Conversations
- Sphinx – NAAS
  - SOPA
  - Recorded Audition

**Challenges**
- Concert Experience
- Tradition – Uniform

League of American Orchestras
Breakout Group Notes: Building Consensus

Successes

- Open Dialogue that Leads to an Agreed-Upon Action Plan
- General Understanding of DEI
- Willingness to Work on Representation
- Clear Vision
- Increased Board and Audience Representation
- Virtuous Enthusiasm Cycle
- Well-Written EDI Document in Strategic Plan
- Biracial Conductor with Creative Vision
- Providing Funding for Staff to Attend DEI Education During Work Week
- Knowing & Showing WHY this Work is Important to the ART
- Hiring a Director of Equity
- Diversity in Programming
- Action-Based Solutions to DEI Issues
Breakout Group Notes: Building Consensus

**Successes**

- ASL at Concerts
- BIPOC Artist in Residence
- Open Conversations of What this Means to People – Provide Coffee!
- Be Extremely Transparent with Plans – Ensure that Materials are Easy to Access
- Open Listening without Judgement
- Strategic Plan that Finally Embraces DEI and Staff/Board Accountability
- Holding Musician Town Halls between Rehearsals in Order to Share Stories
- Slight Increase in Inclusive Programming and Representation
- Formation of Committees
- Wide Engagement from Different Parts of the Organization
- Having Conversations with the Board
- Starting a Youth Program for Musicians in Underrepresented Groups of People
Breakout Group Notes: Building Consensus

Successes

- Participating with SOPA and Sphinx
- Raised Awareness
- Change the Views from Win vs. Lose to Win-Win
- Support from Funders
- A Committee that Includes Stakeholders from Various Constituencies
- Inviting Stakeholders to Participate in Discussion from Point of Inception & Ideation, Not Further Down the Road
- Formation of a Multi-Constituent DEI Committee, including Staff, Board, and Orchestra (Recently Expanded)
- Composer-in-Residence – US/State Premieres and Workshops
- Committing to DEI in the Strategic Plan
Breakout Group Notes: Building Consensus

**Challenges**

- Fear of DEI Program Elimination and Funding Elimination
- Buy-In of Committee Recommendations
- Measuring the Diversity of the Audience (Data)
- Music Directors: Tenure, Audition Process (Music Director Veto)
- Helping Musicians Understand Why Invitations are Necessary
- Narrative of Diversity
- Community Resistance
- Fully Blind Auditions – Fear of Lower Expectations
- Economic
Harold Brown’s Top 10 Lessons for Developing Your DEI Strategy and Plan

1. Clearly articulate “Why DEI” and link it to Vision and Mission
2. Deeply embed DEI in every area of the organization; however . . .
3. Focus on a few key areas (goals/objectives/measures) that will be most meaningful and impactful
4. Be guided by clear, detailed, reasonable plan; but maintain flexibility, especially re strategies/tactics
Harold Brown’s Top 10 Lessons for Developing Your DEI Strategy and Plan

5. Invest in good data collection and analysis capabilities

6. Professional development should address needs identified through staff, musician feedback

7. Leaders matter and must lead unapologetically, especially early on

8. Engage and involve community, external partners

9. There is no one-size-fits-all blueprint; be confident in your choices

10. Extend grace – there will be challenges and slip-ups
Closing Thoughts & Thank You

The League is appreciative of the orchestras who have put themselves on the line to learn, experiment, accelerate innovation and advance their organizations in the areas of equity, diversity and inclusion – and to their contributions to field wide learning.

Deep gratitude is due to the Mellon Foundation for their investment in the League and the orchestra field. Additional thanks to the Paul M. Angell Family Foundation for its investment to make learning and networking opportunities possible.
League of American Orchestras
Catalyst Program Participation

Northeast:
- Albany Symphony
- Empire State Youth Orchestra
- Greater Connecticut Youth Orchestras
- Handel and Haydn Society
- Kennett Symphony
- New Haven Symphony Orchestra
- New Jersey Symphony Orchestra
- New Jersey Youth Symphony
- New York Philharmonic Orchestra Lumos
- Pittsburgh Symphony Orchestra
- Princeton Symphony Orchestra
- The Philadelphia Orchestra

South:
- Arkansas Symphony Orchestra
- Atlanta Symphony Orchestra
- Charleston Symphony
- Charlotte Symphony Orchestra
- DC Youth Orchestra Program
- East Texas Symphony Orchestra
- Jacksonville Symphony Association
- Lexington Philharmonic
- Louisiana Philharmonic Orchestra
- The Louisville Orchestra
- Nashville Symphony
- New World Symphony
- North Carolina Symphony
- Richmond Symphony
- Virginia Symphony Orchestra
- Winston-Salem Symphony
- Youth Orchestras of San Antonio

West:
- Berkeley Symphony Orchestra
- BRAVO Youth Orchestras
- Hawaii Symphony Orchestra
- Kaleidoscope Chamber Orchestra
- Los Angeles Chamber Orchestra
- Los Angeles Philharmonic
- Napa Valley Youth Symphony
- Oakland Symphony
- Oregon Symphony
- Pacific Symphony
- San Diego Symphony Orchestra
- San Diego Youth Symphony & Conservatory
- San Francisco Symphony
- Seattle Symphony
- Symphony Tacoma
- Walla Walla Symphony

Midwest:
- Adrian Symphony Orchestra
- The Chicago Philharmonic
- Chicago Sinfonietta
- Chicago Youth Symphony Orchestras
- Cincinnati Symphony Orchestra
- Contemporary Youth Orchestra
- Detroit Symphony Orchestra
- Grand Rapids Symphony
- Grant Park Music Festival
- Illinois Philharmonic Orchestra
- Indianapolis Chamber Orchestra
- Indianapolis Symphony Orchestra
- Kalamazoo Symphony Orchestra
- Milwaukee Symphony Orchestra
- Minnesota Orchestra
- South Dakota Symphony Orchestra
- St. Louis Symphony Orchestra
- The Saint Paul Chamber Orchestra
- Wisconsin Chamber Orchestra

League of American Orchestras