

# Pathways to Equitable and Inclusive Orchestras

June 15, 2023

HAROLD BROWN: I'm Harold Brown. I'm the chief diversity and inclusion officer for the Cincinnati Symphony Orchestra. And I'm honored to facilitate this elective session today. And it is entitled Pathways to Equitable and Inclusive Orchestras. So thank you for choosing this session, and for being here as we learn from each other and grow together.

Needless to say, this is a huge topic, and we can't possibly give it justice in 90 minutes or less. But our goal for today is to share insights and experiences from a handful of industry leaders with the hope that you'll be able to take back to your respective organizations useful tools and information and practical tools that will aid you in your ED&I journeys. And we also expect to hear from many of you through an interactive activity that will happen in a little while and through our Q&A.

So I'm joined by a distinguished panel of experts who represent different roles and different kinds of organizations within our field. Helen Cha-Pyo is the artistic director and principal conductor for the New Jersey Youth Symphony. Marianne Rice is the vice president of music education and DEI initiatives at the Jacksonville Symphony. And Dana Stone is the executive director of the Indianapolis Chamber Orchestra.

And each of those panelists will have up to about seven minutes to share their story of vision, progress, and lessons learned. Also joining us in a speaking role is Heather Briere who serves as the director of learning and leadership programs for the League. And let me just say that Heather and her colleagues have been terrific in planning and activating this session. And so in just a moment she is going to speak to us about the League's EDI commitment, and the Catalyst Fund program.

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I'm not going to read lengthy introductions and bios for our speakers, but you can find that information in your conference materials. So why are we all here in this particular session today? And much like our panel, we represent different communities, organizations, backgrounds, and contexts. However, I'm guessing that most, if not all of us, are sitting in this session because we do have some things in common.

For example, we recognize that over the past several decades subscription sales and attendance have been dropping in our classical music industry. Audiences are getting older, and too many young people are turned off by classical music because they see it as an elite and exclusionary art form. Second, we are well aware of the orchestra field's history of bias and discrimination that has contributed to the loss of valuable contributions by generations of women, people of color, and other disenfranchised groups and individuals, and deterred such folks from pursuing careers in and otherwise supporting classical music.

Third, even though we know that EDI is not just about race and ethnicity, the fact is that current census population projections tell us that racial minority groups will be the source of virtually all population growth over the next several decades. In fact, the US is predicted to be minority white, or majority non-white by 2045. And this has serious implications for our organizations and how we go about attracting and recruiting potential patrons, donors, board members, staff, volunteers, and of course artists and musicians.

Fourth, we know from research that a lot of African American and Latino kids play instruments, but drop off because they are not seeing people who look like them, and not getting the idea that this is something they can do for a living. There needs to be more representation in the field showing musicians of color performing at the highest levels. And this sentiment also applies to women and also for various roles in our organizations including conductors and administrators.

And fifth, of course we are all seeing clear and increasing expectations from philanthropic foundations, government entities, and the general public that our arts organizations must become more diverse, inclusive, and equitable. But we also know that for many of us there is some good news. Despite the ongoing challenges of cultivating musician and audience diversity, some of us are making good progress on many other fronts regarding overall diversity including our staffs, our boards, programming, community engagement, just a few examples.

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And thanks to the success and promise of programs like NAAS, the National Alliance for Audition Support, SPOPA, the Sphinx Orchestra Partners Auditions, NIMAN, the National Instrumentalist Mentoring and Advancement Network, diversity fellows and many others, a growing number of highly qualified musicians of color are overcoming barriers to inclusion, and orchestras are having access to an expanded talent pool.

Some of us are seeing that increasing the diversity of conductors and artists on stage is bringing a richness of perspectives, broader repertoire choices, and new ways to program, all of which are

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beginning to attract and inspire a broader audience and base, increasing our relevance to our communities, and growing our revenue.

And finally, we are also seeing that orchestras that have diversified their programming in terms of repertoire, format, and even venues, in addition to their ongoing traditions of fixed subscription models, have begun to attract younger, more diverse audiences, and countering the commonly held perception that orchestras are exclusively by, for, and about aging white and elite audiences. I'll stop there. A lot more we can say, but I'll stop there. I'm going to leave it on a high note.

[LAUGHTER]

HAROLD: But now we're going to turn it over to Heather to talk about what the League is doing in terms of its commitment to EDI. Heather Briere.

[0:06:02.4]

HEATHER BRIERE: Good morning everyone. The League, as you know, is committed to helping all of you accelerate the pace of EDI change within your orchestras, within your communities. We — our ultimate goal is that the orchestra field reflects and embodies the beautiful diversity of this country. The League is trying to provide resources to all orchestras that support the building of diverse organizations and inclusive cultures.

We at the Catalyst Fund, the League builds understanding and competence in EDI practice, deepens impact across the field by building a robust community of EDI leaders, and overall just increases our EDI practices. What started as an over \$4 million investment by the League, we created the Catalyst Fund program. It began in 2019 with three years of Catalyst pilot program, where orchestras were given one year grants, and to be renewed for years two and three.

In March 2022, we launched the Catalyst incubator program, where we're working very closely with 20 orchestras on three year grants, because we realize this work takes a lot more time. It's a never-ending journey. Over these six years, we have been able to provide grants to 65 orchestras across our country, from the largest budget orchestras to the very smallest, professional, chamber, and youth orchestras from diverse communities all across the country. And you're going to hear from a range of them this morning.

What started in 2019 in the League saying one of the keys to success in making EDI progress is partnering with an EDI consultant, what started as a list of zero has now grown to over 50 known EDI consultants who are doing work with orchestras. That list is on our website as well as an RFP guide to help you select the consultant that is perfect for your orchestra, for your community.

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We also have accrued over 250 active members of the Catalyst community who are growing leaders in EDI practice in orchestras. We are working on a series of five publications through this program. Three have been published. The first was a promising practices guide, which are actions that any orchestra can take to advance towards equity. The second was a series of seven case studies called Catalyst Snapshots.

The third, which we launched earlier this year, was an artistic planning. We're working on one now, which will hopefully come out in the fall, which is on audience diversification. And there will be one additional one coming out later probably next year. So of these 65 grantee orchestras, I just want to highlight, we are all across the country, we are large and small, we are deeply embedded in our communities, doing this work because it's not just in our home orchestra. We serve our communities.

I encourage you, we're going to put this map up at the end of the session today, I encourage you to take a close look at it. Look at the orchestras on this list. Notice if there's any orchestras in your community, in your state, notice if there are other orchestras of your budget type, or you know, size that you might want to connect with. Because they're all doing amazing work. We're all in this journey together, and we can all learn from one another.

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Of the 65 grantee orchestras, we've noticed that we have a wide range of Catalyst project, but the most common boil down to six. Learning and skills development for staff, board, and musicians. Alignment in this work is key. And we've noticed that through the Catalyst program you really do need all three constituencies involved for success to happen. There have been many Catalyst projects that involve extensive EDI audits, and that's one place that consultants are really key.

Our orchestras have created formal EDI vision statements and action plans. They've really overhauled their HR processes, as well as communication, marketing, and ticketing strategies touring those audiences in that are not currently being activated. And one of the key things to this work, and

we'll have a small group breakout discussion on later, is this work is sometimes hard to quantify and qualify. So how do you measure that progress.

In the Catalyst Fund program, we have three guiding values. Humility, transparency, and authenticity. And as you hear from these amazing speakers today, I hope you hear all three deeply rooted in everything they're going to say on their EDI journey. If I could just add a fourth that's an unofficial one, I would say grace. Because we all need to give ourselves grace in this work. You know, the journey is not in a linear path. Sometimes those small wins are just as important as our lessons learned. So next I'll turn it back over to Harold.

HAROLD: Are there any burning questions for Heather? Anybody want to ask any questions about what she's discussed? Okay, then we'll move ahead with our panelists. First we'll hear from Helen Cha-Pyo, again from the New Jersey Youth Symphony.

[0:11:55.8]

HELEN CHA-PYO: Thank you. Thank you, Harold. Good morning everyone, and I'm really delighted to be here to share our organization's ongoing journey toward EDI, and B, belonging for — especially for youth, particularly in the context of education and making that environment inclusive for our young people. So I should really kind of preface by saying New Jersey Youth Symphony is one of four programs under the umbrella of an organization that serves over 2,000 students, is the largest after school performing arts education organization in New Jersey.

So as the artistic director of Wharton Arts, and principal conductor of New Jersey Youth Symphony, this is my fifth year. And when I first came, the Catalyst Fund invitation was just being sent. So that begins our journey in 2019 as one of the pilot Catalyst Fund grantees. And was re-newed for the second year as well. We have New Jersey Youth Chorus as well as Patterson Music Project, which is an [UNINTEL] inspired program, and also a community music school.

So after — when we received this grant, we together decided that Wharton Arts had never done any EDI work before. So we didn't even know kind of what those words meant. And so in 2019, we looked for a consultant, and it was unique for us because we needed a consultant who would be coming and speak to a third grader, group of third graders, all the way to the board of directors, and everyone in between.

So that's a very unique thing. So I ended up searching for a consultant who was a local history teacher that also was an equity officer at a local school. So she came in and worked with us for two years, and  
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mainly we wanted to really dive into educational workshops and just EDI — you know, laying the groundwork. So she did more than 15 different workshops with different constituencies from elementary, middle school, and high school, to our artistic staff, our admin staff, our program staff, our board of directors, parents including.

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So that began kind of the majority of our year, the first year, really just kind of having that difficult conversation, and having her facilitate was a really key element in creating that safe environment for the staff. So that experience really opened the conversation every day amongst staff. We have 17 full time staff, and 85 artistic part time artistic staff. And so we built an ad hoc EDI stuff committee, which could facilitate some of these issues that we were being taught to be aware of. And really delve into it each week at our staff meeting.

We saved about 10 minutes at the end and the ad hoc committee would bring a topic to discuss. And that slowly opened the door for people who weren't really comfortable talking about this to just be part of that conversation. So after all of that, the one session that our consultant did was really a listening session, we called it, and we invited New Jersey Symphonies, Black and Latinx students, which make up about five percent of our student body just in the NJYS. And alumni.

So without any of us here doing — listening. But out of that, one sentence came from a student. I feel like I belong here for sure when I'm playing in the orchestra, but when the music stops, I don't feel I belong here. So that pierced all of our hearts very deeply, and so that was really kind of a wake up call for our organization. So from there, our staff in different ways outside of our consulting work, we went to antiracism, anti-oppression training, we would send group of faculty to undoing racism workshops that Rutgers University would offer to us, Equity Center pedagogy programming for our [UNINTEL] program teaching artists.

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De-centering whiteness and building multicultural society. All kinds of community offered training. So that was really year one. We were just really confused. [LAUGHING] And it was very difficult to just process all of that, because it was — there was so much emotion around that. Year two, it lined up very well for us because our organization was going through a five year strategic plan. So our consultant became a partner with our strategic planning consultant, worked together to make sure that we would come out that year with a strategic plan that had EDIB written everywhere in every objectives and goals.

So the timing really worked out. At the same time we were given an opportunity by Dodge Foundation for the entire organization to go through a six months long training that was offered by not for profit center at LaSalle University, diversity, equity, and inclusion in the workplace. So our board members, our senior staff, our operations staff, our faculty, and all of us, about 12 of us, went through a six month training.

So that's like really our story. We are still learning, we're still trying to create that environment. And one thing that we learned working with young people is that there is an increased number of students with neurodiversity coming to us, and social and emotional learning. So the gap that we have to really fill is teacher training, conductor training.

We have to really understand how to celebrate diversity, and amplify our student voices, giving them agency in order for us to go forward with them right next to us, not being led by the adult. So we are continuing on this journey. It's difficult, but I think we are now facing the same di-rection as an organization, agreeing to walk toward it together. Thank you.

[APPLAUSE]

[0:18:27.2]

HAROLD: Thank you, Helen. I should have mentioned that we will take a handful of questions after each of the presenters if there are any questions. We have Sam walking around with a mi-crophone. So does anybody have any feedback or questions for Helen at this time?

SPEAKER: Did you have any pushback from any of your board members or anyone?

HELEN: We didn't have any pushback openly. However, kind of, you know, maybe distance and removing themselves from these kind of activities, not showing up. So kind of passive way of telling us that I don't feel comfortable. Yeah, so it really wasn't to our face. But also I was brand new. I was first year as the artistic director. And usually artistic directors don't kind of bring these issues, you know, at the board meeting. So they were a little bit taken aback. They didn't know me. But coming in, this was very important passion, and important in my leader-ship for this organization. So personally, probably they stayed away a little bit further from me. But I think right now we have made some progress, yeah.

HAROLD: There was another question.

SANDY: Hi Helen. Sandy Troy [?] from DC Youth Orchestra. I'm curious if you'd talk a little bit more about how you got input from the students in your organization and what kind of feed-back you got from them as well.

[0:19:58.1]

HELEN: So we did kind of different activities throughout the year that first year with different — and so we would kind of not rehearse, and we would have the consultant come in and do actual very physical activities, you know? That EDI works — that specialists do. And then we had small group conversations. And we didn't really jot down any notes and things like that, just because we wanted to create that safe space where, you know, adults are not listening.

So we kind of let them be in their own space. And I think by osmosis, throughout the whole year the language kind of started to change, especially with a little bit the younger students. Like, what it means to be an upstander[?], you know? And what it means to have empathy. What equity means. They would kind of go around telling each other what the equity meant, you know? Using that — giving the taller podium for someone like me compared to someone who's like six feet tall. You know, that kind of thing.

So that was really the feedback. We didn't really formalize, except the student leadership in our Patterson Music Project, we have student leaders who are really being trained nationally by going to these [UNINTEL] USA leadership training, and they bring back a lot of that agency to our organization.

HAROLD: Maybe one more. Is there one more question for Helen? Okay, all right, let's go on and move to Marianne Jackson — Marianne Rice, I'm sorry. Marianne Rice, who is the vice president of music education at the Jacksonville Symphony. Welcome Marianne. Sorry about that.

MARIANNE RICE: That's okay. [LAUGHING] The Jacksonville Symphony's mission is to enrich the human spirit through symphonic music. We are committed to fostering a culture that values and embraces diversity, equity, and inclusion. These core values will be reflected in the makeup of our patrons, orchestra, professional staff, and board, as we mirror the community we serve. We pledge to engage culturally responsive performances, education, and community initiatives.



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Our strategic plan would be the guidepost for accountability as we achieve our goals. I am Marianne Rice, and I am the vice president of music education and DEI for the Jacksonville Symphony. What I just read was our DEI statement, which also has a portion of our mission statement. And I want to share one of our first goals that we achieved at the symphony. A lot of times, you know, we think of leadership, we always think of it as top down.

But I like to think of it as from the bottom up. And because of our leadership at the Jacksonville Symphony with our board members and our CEO, they set the precedent of what we have now for diversity. Without their vision, I don't think we could be here today. They set the tone. In the beginning, when I was hired as the director of music education, our CEO came and discussed this idea of a DEI task force, and asked me if I wanted to be on the task force. And me with my ambitious goals, I said, "Sure, why not?" [LAUGHING]

So the task force was initially started to assess the organization internally, and to see what we needed to do to have a growth mindset in order to be more community service. And also to reflect, again, the community that we serve. So once we started with the task force we were able to get our stakeholders involved, which is our board, our staff members, as well as our orchestra. And then we were able to hire a consultant to do an assessment of our progress that we have done so far within the symphony.

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Once we conducted the assessment through interviews and surveys, we were able to come up with goals and other objectives that we needed to proceed in order to make our organization more inclusive and our programming more inclusive, and just the idea of what DEI is. And so from there we were able to obtain funding to continue our research, and discuss how we can continue to move forward.

So within the first year, we developed a DEI strategic plan, which is part of our overall strategic plan for the Jacksonville Symphony. So we want to make sure that we continued to stay connected with our strategic plan, that we don't deviate from that. So with our DEI plan, we were able to set metrics. And a lot of times when you're talking about metrics, you want to think of how can I look into the audience and see how many African Americans are in the audience, how many Asian Americans, or Latina Americans in the audience.

Or we always — we ask questions, how many African Americans are participating in our youth orchestra. So in order to do that, we had to set up a plan to discuss how we would go out into the communities, how we would represent underrepresented population of Jacksonville, and we also had to get community stakeholders involved. So our DEI committee took that work and we worked together with our staff members, with our development staff, with our marketing staff, with our programming staff, and we were able to set those metrics, and we developed a five year plan.

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So that was the first progress that we had made with our DEI strategic plan. Now, we say in Jacksonville DEI is a journey. We're not going to do this overnight. So some of the learned lessons that we had throughout the year was through our consultant adapting what I called a standard DEI process, how does that fit for our organization. And there was some questions on how do orchestra members, their role in being decision makers. But we still have to include them in the processes of how we do programs.

And so we have our programming committee, where orchestra members can bring forth ideas. We have our marketing committee, where members as well as staff members, orchestra members, can bring forth idea of how we continue to market to underrepresented communities. So I think within our first year we have made great success, and we continue to go back, look at our DEI plan, and check off the things that we've done for the year. So we've gone into our second year, and we are still looking forward to a growth mindset of how we do our DEI work.

HAROLD: Okay, thank you Marianne.

[APPLAUSE]

HAROLD: Any questions for Marianne Jacksonville Rice?

MARIANNE: Marianne Rice. [LAUGHING]

HAROLD: I did that on purpose obviously. I did that on purpose. I did that on purpose, I really did. Okay. Are there any questions for Marianne?

[0:28:12.4]

JESSICA PHILLIPS: Hi, good morning. Can you hear me? My name is Jessica Phillips, I play in the Metropolitan Opera orchestra. And I am so curious about the coordination and work that you did with the orchestra. And you mentioned artistic programming. And I guess I want to maybe just bring the elephant in the room. And ask if you have embarked on work in terms of audition, tenure, talking about unconscious bias training before tenure meetings. Things like that. And which obviously need to be brought to the negotiating table, or discussed with the music director. And if you've done that, how have you gone about doing that?

MARIANNE: Well, for the unbiased training, we did have educational training where all stakeholders participated. So it was our board members, orchestra, as well as staff members. As far as the orchestra standpoint of diversity, we work with our operations manager and also our VP of operations. And so we also partner with Sphinx Organization. And we have a fellowship, so — and through funding we were able to have two Sphinx fellow orchestra members on stage throughout the entire year as well as five Hispanic Americans that came and they participated in different classical concerts.

And we are continuing that for our '23/'24 season. So I think you have to have collaboration with your operations and your artistic programming. Without that it will not work. So I think we are in lock step together. And all stakeholders are — we all have the same goal in mind.

HAROLD: Another question for Marianne?

[0:30:07.2]

BILL: Hi, Bill Neary [?] with the National Alliance for Audition Support Sphinx Organization. Just keeping that elephant in the room just a little bit longer — sorry. So I know that's a really big first step, and unfortunately a first step that not many orchestras in this room have been able to take. Fellowships, temporary placements, and things like that. And I'm just curious what conversations have looked like to go the next step in terms of longer term, more full time placement, breaking down certain CBA barriers, audition practices. Just curious what light you could shed on what those conversations look like, and what the future looks like for that.

MARIANNE: That question I cannot answer. [LAUGHING] That is an operation aspect, it's not in my actual wheelhouse. But I will say, with the help of funding our development team has been awesome in raising funds to continue to diversify our stage. So that is the first step. Now, when it comes to the

audition process, I cannot speak to that part of it. But I think funding helps us to diversify the stage and so that people and our patrons can see themselves when they come to the symphony.

SPEAKER: Hi Marianne, great job.

MARIANNE: That's my CEO.

[LAUGHTER]

SPEAKER: She's amazing. The elephant in the room. So the elephant in the room is multifac-eted of course. Obviously it involves talking about blind auditions and doing away with blind auditions, which is the ultimate elephant in the room. As far as Sphinx is concerned, we had I think seven or eight this year, two were year round. Next year our goal is to have 12. Those who have advanced, one of these Sphinx fellows will move forward next year for another year. They automatically move into the final round in auditions.

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So that's one thing that we've taken care of through the CBA. So if you're from Sphinx, you move forward after the first year for another year because we've had an opening. You're auto-matically moving into the final round of auditions. How we get around blind auditions, well, that's the big issue, isn't it? That this industry needs to face. And through the funding of AW Mellon, the other service organizations, Dance USA as Harold's probably aware, and TCG, Theater Communications Group, have addressed it differently.

I think in the dance world they've actually established a special Black dancer audition program, because you have to see the people, the dancers, before you can hire them. We've had this discussion with our orchestra, and I have to say, frankly, they're divided. Half of them want blind auditions and half do not, and I don't think the profession has come around with or come up with an answer yet. Because that's the ultimate elephant in the room.

How do you — how can you possibly increase diversity, so showing my bias, how can you possibly increase diversity if the process is blind all the way through. And at some point do you have to lower the curtain somewhere in the process to change that. Because we don't hire any-one else in the organization completely blind. I suppose we could, you know, submit a detailed, difficult exam to a

potential marketing person, and then say, well, based on your answers we're going to hire you without ever meeting you.

So I don't know if that answers the question, but I love you brought it up. That's the elephant in the room. We love Sphinx, by the way. If you're not involved with Sphinx, kudos to them. They're absolutely an incredible organization. So thank you. Thanks Marianne.

BILL: Thank you very much.

HAROLD: Okay, you all right? I know you had a question. Is it really quick? Real quick.

[OFF-MIC QUESTION]

[0:34:05.8]

MARIANNE: The inclusion process, that is intentional in everything that we do. So in order to be diverse, of course you have to include. So anyone that is joining our organization, they are told this is the culture of who we are. And so you have to — you want to fit into that culture. So again, like I said, it starts from the top. So we're not changing what we do. So it is known that we are — everyone is included in everyday office work. So that is automatic. Yeah. You can't work in silo in the Jacksonville Symphony because it's not going to work. [LAUGHING] So that's just how we have an inclusive environment.

SPEAKER: I think — and I'll just add to that a little bit. I think it does become imperative for all of our organizations to not settle for just diversity, because diversity without action and pro-activity around inclusion is hollow, and you're going to have a revolving door. So what we've begun to implement are regular surveys and focus groups that ask employees how they are experiencing our organization.

And we need to do that with audience members as well. But until you have that feedback and that data, you really don't know how people are feeling. Are they feeling a sense of belonging, what issues are troubling them, and then you can tailor your professional development and your learning towards that. Okay, I get the hint. I get the hint. So now —

[LAUGHTER]

SPEAKER: Wow, that was subtle.

MARIANNE: Wait, this is a Beyonce moment.

[LAUGHTER]

HAROLD: So Dana, we're going to bring Dana Stone, who is the executive director of the Indianapolis Chamber Orchestra, forward for her presentation.

DANA STONE: Good morning, and now we have light again. So I thought I would start and just give a quick snapshot of who the ICO is. You know, Indianapolis is a smaller city, about two million in population. We're just under a million dollars, and we're the smaller orchestra, smaller to the Indianapolis Symphony, of course. We have a seven subscription concert series. And a core musician group of 32. We are a CBA union orchestra.

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Our board is 21, and we have a full time staff of three. We are mighty. And we are focused on this work, and I think that really ties into what we want to do with Indianapolis, and how we would like to serve our community in a really intentional way. I would say our DEI journey started in early 2020. I wasn't with the organization at that time, but I do know that the strategic plan started to mention it in a couple places.

And that kind of spawned the development of a committee, and sort of intentional work within the community, stakeholder groups that were from underrepresented communities. And how we could kind of get the ball rolling. We started with a first DEI consultant that did some board and staff training, and then began the Catalyst Program of application.

I think what was important to our board and our stakeholders was to really establish a starting point. Where are we, how do we assess and monitor our existing practices, and our programs, and how can we measure progress. I think people want to know, well, what are you doing. And we wanted to be able to tangibly say, well, we've done this, this, and this. There are the things that you can't touch and see, but there are things that we can measure.

And we wanted to have a starting point to do that. Also, initial feedback was that we needed to recognize and celebrate the work that we were already doing. We had for a long time had a lot of underrepresented composers on our programs, of guest artists from those communities as well. But we maybe weren't talking about it. It was there. We listed the name, but we didn't say, hey, this person is from this group, and you need to check this out.

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So that became a part of our marketing and our narrative in a much more intentional way. And really bringing the vision forward for the community so that it wasn't hidden behind kind of language or anything. It was really being celebrated. Collective buy-in also became a really important part of the beginning part of this process. We started with a two day, two, three hour sessions with various stakeholders, our board, and we invited musicians to be a part of that.

And it became a giant brain dump of ideas, and partners, and people that are cheerleaders in the community for this work, and how can we get that going. From that, our DEI consultant helped us establish kind of a six plan goal. These are the things that we identified that we needed to do. We needed to look at our practices, goal one. We needed to build a diverse board that was reflective of the community. We needed more representation on stage, not just in guest artists and composers, but also in the musicians that were playing within the orchestra.

We needed to celebrate and continue to create concerts that included diverse array of classical musical experiences. We needed to conduct community engagement projects and develop new education programs. And we needed to support the people in our community that were doing this work. We needed to be present outside of our events at those events, and how could we be a part of the work that's happening throughout the community.

So within those six goals, we created action items. We'll do this, and we'll do that. And who's going to do that work. And where are we on each plan. When do we want to accomplish this by, and how do we update it. So we have this kind of living Google Drive document where we all go in and kind of add things to notes so that we can continue to see what's happening, there's a color code, you know, various stoplight system, so that everyone can see what's happening.

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I would say we've had successes in each of our goals. You know, we have been able to increase the number of BIPOC vendors that we work with, both the number of vendors and the amount of money

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worked and spent with those vendors. We've been able to improve our board diversity. We have made progress on musician representation but this is definitely our goal that needs the most work. So we have some plans and ideas, partnering with other orchestras in our region, and one of them's here today, to develop kind of a shared fellowship for part time orchestra.

How can we make this a viable option for a person not from our community that is qualified and wanting to make a career. Most of our musicians are already kind of doing that sort of multifac-eted gig work with multiple regional orchestras and teaching. How can we provide a network and an established opportunity for those people. Programming, community engagement. How often are we the only white person in the room.

We need to kind of put ourselves in those shoes, and try to continue to think about how others might feel in participating. Of course there have been challenges, and as everyone's mentioned, this is not linear work. In every win, there has been a loss. But the work is forward moving. And instead of challenges, I decided to kind of point out some hindsights. I thought that we were do-ing a great job with communication.

But maybe we weren't. And that's what feedback happened after our musician training. They didn't understand the vision. Although they had been invited to participate in committee meet-ings, in those big info sessions, three, three people had participated. And with that, they as-sumed that we weren't doing the work intentionally. And most of them are invested in this work. You know, our CBA negotiations last year, we identified that we needed to be creative, and we needed to break out of the mold, and we needed to take some chances. And together we could accomplish this. But not with the systems that maybe we had always loved and lived with.

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So musician training, it didn't go as well as we wanted. So I would have done it differently. I would have started with a conversation with them. And we ended up doing that after the fact, where we presented this plan again. But also introduced kind of a way that we're going to communicate this every month. So we have a Google folder, and we share everything, and we continue to email them, and tell them who's on the email, because that became a question as well. So transparency, even too much transparency I think, is extremely important, and we're just going to keep plugging on as we try to accomplish these goals.

HAROLD: Thank you Dana.



[APPLAUSE]

HAROLD: Any questions for Dana? Questions for Dana? Okay. Okay, then I have five minutes — oh, I'm sorry, go ahead.

CHRISTY HAVENS: Hi, Christy Havens with Virginia Symphony. We have a fellowship pro-gram as well, and we're trying to diversity our sub-lists. And one of the things that we've done to begin that is using the SOPA audition recordings. During COVID they were recorded. And we have previously sent our concert master every year to the conference, and he wouldn't necessarily come back with huge lists of names for other instruments. So we started using those recorded auditions. And I'm hoping that they continue to be available recorded. Are there any things like that you guys are doing to try to introduce your musicians to people who are outside of their current sphere of influence and circle of friends to help that process?

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DANA: Yes, definitely. So we did have multiple musicians participate in the recording sessions for SOPA. So we had some woodwinds and also some strings. So they participated in that. And the goal is to kind of reach out to those people to kind of, one, get them on our sub-list, invite them to participate in that shared fellowship. But I think what happened, what we've noticed at least, is that people kind of get stuck in this has been my sub-list for the past 20 years.

So we are asking all of our principals to renew their sub-list by July 1st. And then also invited every single orchestra member to think about their network and their network's network, and to provide those names to both our personnel manager and music director to assess if there are some people that maybe we don't know but we need to pursue. So we're working on that.

HAROLD: Any other questions for Dana? So she's letting me know that I don't have any time. But I'll cut off five minutes at the end if I can just quickly overview what's going on at the CSO with regard to how we've structured our DE&I work. I promise to be very brief here. So we were participating in an LAO webinar not too long ago, and just gave some more detail, more than I can do today, so maybe some of this will be familiar, but unfortunately we're not able to dig too deeply into this.

But clearly, for us, this vision statement drives our DE&I work to be the most relevant orchestra in America. And I always start with the why, being very clear in articulating the case for DE&I. How does a DE&I strategy get us to where we want to go and help us become what we want to become. And we talk about the business case a lot, but as important as that is, there's also a moral imperative here, an  
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imperative to remove barriers that are preventing people from being successful and achieving their goals.

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We all benefit from the richness and the variety that comes through diversity both in music as well as in our collegial relationships. Representation is very important. We are going to be relevant to all of our community, then they need to see us on the stage, and so there has to be representation throughout our organization. And so what we've done is we've elevated DE&I to one of our top three organizational goals.

And it's called goal three, to reflect, not just reflect, but to reflect and welcome the diversity of our community on our stage, in our audiences, in our offices, and our board. And with each of these goals there's a series of objectives as well as action steps and measures. So again, we don't have time to go through that all today, but if we can quickly go — there are six objectives underneath that third goal around diversity.

As you can see, it has to do with audience diversity, the second one has to do with musicians on stage, the third one with guest artists. But what I want you to notice is that there's a primary owner that's not me that's listed there. I assume responsibility for this goal overall, I think that's how I'm going to be evaluated by my CEO. But it's important that this work be owned by others in the organization who have primary responsibilities in the areas that you're trying to implement EDI strategies.

So you can see that when it comes to our audience diversity, our VP of marketing has dug deeply into the data and continues to do that, and is developing strategies in conjunction with others of us. And you can see that our VP of orchestra and production is really taking on the issue of musicians on stage. So it's not about one person or even one department, it's about an individual who's leading, but all of us are all rallying around that.

The next three objectives under this goal have to do with our staff board and volunteer base. I think from what I've heard, many of us are making a lot of progress there. Sort of low hanging fruit relative to audience and musician diversity. And that's owned by our VP HR. Then our fifth objective underneath this goal has to do with our learning department, how we serve youth, our youth orchestras, after school programs, etcetera. We just completed a strategic plan that's really going to add a lot of resources and robustness to that area. That's owned by our director of learning.

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And then our sixth objective under this goal has to do with our community engagement. We're doing more out in the community with performances and partnerships and bringing the community in in different and new ways, owned by one of my staff, the director of community engagement and diversity. So I just wanted to lay that out there about how central this has become, but also it is owned across our organization. Other people have accountability built in to their work relative to EDI. Is that it? Okay, I did that in about five minutes. All right.

[LAUGHTER]

HAROLD: Would love to take questions, but I'm afraid they're going to turn the lights off on me again. No. Anyway, so there will be some time at the end for sure. So I'm going to turn it back over to Heather to talk about a real brief activity that we're going to do to dig a little more deeply into some of the topics that you've heard. Heather?

HEATHER: Yes, so thank you to all who have contributed to the design of this program. I know we asked Catalyst grantees past and present, what are hot topics that would be helpful for you? What tools can we provide coming out of this session? What do you want to discuss? So we're now going to break out into four groups, where you'll see chart paper around the room. And we will have about 25 minutes to talk in small groups about the strategies and challenges around the topic.

[TAPE SKIP]

HAROLD: What we'll do in the interest of time is ask the four of us to just share very briefly, like less than a minute, like one takeaway. That's okay. That's okay, Ms. Jacksonville. [LAUGHING] I'm musing that for all it's worth. So —okay, anybody ready? What's one takeaway from your — and which was your group, and what's one takeaway?

HELEN: Okay, I can start. So this was with an EDI consultant. The importance of having a consultant to work with us. One takeaway was kind of group of staff from each department, whatever you have, good representation of your staff to come together and make a good relationship with one or two or three board members who will champion behind this work, and so that when in the board room decisions are made by the peers, kind of getting excited about it and passionate about this EDI work. And budgeting for a consultant to be hired, and so that there is a synergy there, but not just a staff coming in and talking to the board and trying to convince them, but really finding allies in the board among the board members, and building that relationship.

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HAROLD: Let me also say that LAO is going to type all of these flip charts, and it'll be sent to everybody who posted —

HEATHER: Yeah, we will send this around later this summer. It'll be the full slide deck, and all of these strategies will also be shared.

HAROLD: Okay, good. Thank you. Dana?

DANA: Yeah, I can go. So I had the alliances and partnerships. And through that we kind of talked about a lot of things, and a little bit migrated into the elephant in the room. But some of the partnership's ideas that came out were kind of thinking outside of traditional music experiences, faith based groups, sports, using chambers of commerce, the Black chambers of commerce, and Hispanic chamber of commerce. We talked a little bit about challenges, some of them being that the concert experience is not necessarily an open door for many people. And that sometimes our traditions are blocks for people from other groups. So we had a good conversation, but I'm not sure I did a good job taking notes.

HAROLD: I didn't even try. We had somebody else do [UNINTEL; LAUGHING]. Thank you. All right, Marianne, do you have — ?

MARIANNE: I had building consensus, and the major theme for the success was board and staff buy-in. I think that was a pretty good statement. Now as far as challenges, you can't get away from the politics of it. A lot of us talked about weaponizing DEI, changing the narrative of what it was meant for. And the word woke came up, how that has been weaponized, and how do we take word back. And also funding.

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DEI is an economic issue, and how do we continue funding for that. And we also talked about how some music directors can be resistant to change. Sorry! [LAUGHING] So that was — we had a very good conversation. I'm sorry.

HAROLD: Good. Okay, and we had measuring progress. A wide ranging conversation. I would say from the success that I think we are all doing something around putting in place, and we talked about this at the EDI constituents meeting yesterday, if anybody was there, putting some things in place, getting started to the frustration of people who want a lot of empirical, quantifi-able data up front.

Most of us that are in this position are very new, and we're just beginning to structure this work, and therefore, structuring the measuring of progress. But I think all of us are doing some things to try to put in place the ability to do that. And the challenge is that where does that live in your organization. Who has the capacity, who has the responsibility, the accountability to drive or lead your data collection and measurement, and deal with all of the challenges that come with that.

So this is — that's something we need more help with, LAO, and represented in our group. I think there's a desire for us to learn more about measuring our progress towards this. And again, I think in many sectors when you're talking about measurement it's about the things that you have to do to get what you want to get, but the ultimate outcome, where the success is, is getting what you're trying to get, right?

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So we can't settle for a lot of things on a list that we're doing, all these programs. Ultimately it's what is it that we're trying to achieve as a result of those programs. We have to keep that in mind. But right now, most of us are laying a foundation, so — and speaking of that, since I don't have time to give this great address at the end to wrap up this session — I did have like these four quick points around laying a foundation for successful EDI that I wanted to share. It's not on the screen.

Although that was going to be my list. But these four things — I kind of summarized that list. One is that you have to have a foundation that prioritizes strong, committed and sustained leadership. We haven't talked about that a lot today. But in order to drive this work you have to have leadership. Not just at the top, throughout your organization. Because this work can get thwart-ed at various places along the way. So it's really strong, committed leadership around EDI.

The second thing is, as we said repeatedly today, you have to have inclusivity, a focus on inclusivity, not just diversity. I used to work in higher ed admissions, and was responsible for multi-cultural enrollment. We could get students to come, give them scholarships and paint this rosy picture, but if the environment was toxic and they didn't feel a sense of belonging, they were going to be gone after their first or second year.

So you've got to build in that inclusivity focus as well. Not just diversity, but inclusivity. Third, accountability around a manageable set of goals and priorities. We talked about this a little bit. Don't try to boil the ocean here. What are those strategies and those things that are most important for your organization. Settle on those. Prioritize those. There are other things that are going on. We've got a lot going on in our organization, but they're not all on that chart that I showed you. That doesn't mean they're unimportant, but in terms of accountability and reporting, and prioritization, frankly, you have to settle on a few manageable goals, and be fine with that.

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And then finally, I said a clear articulation of how DE&I and your organizational vision are inextricably connected. You can't just have DEI sitting out here by itself as a if then, or if we get to it, or whatever. It has to be tied to what you're trying to become. It's a strategy to get you where you're trying to go. So, with that, I want to thank our guest panel for being here today.

[APPLAUSE]

### END OF TRANSCRIPT ###