

# Inspiring Change through Inclusive Stages

June 7, 2024

CARRIE NEAL: My name is Carrie, and I work for Leading ChangeMakers. Leading ChangeMakers is a New York City-based Black owned firm founding — founded in 2018 whose mission is to support the nonprofit and creative sectors by utilizing consulting, training, and research as tools to affect systemic change for the equitable distribution of decision-making power in leadership. So we work from a change management perspective, and we offer organizational support and facilitation, and deep, meaningful, hopefully today will feel like that, engagement with our participants.

We've been working with Inclusive Stages and the League as process facilitators by providing learning support to accompany the excellent work that Kane and Sam have done to gather and encourage orchestras to increase racial diversity on their stages. So there are several guiding principles or guiding values to Inclusive Stages. The first is that musicians will always be included. The second is that the perspectives of musicians of color will always be prioritized. The third is that orchestras will determine their own goals and actions. And then lastly, this first year of the project was moving very fast.

And so for the first year, there was a value around focusing on action available within existing agreements for orchestras that had agreements in place. And as we continue to broaden who's participating in Inclusive Stages, we recognize that there are currently orchestras who are part of the coalition who don't have agreements because it's not in their structure. And then as we begin to work with youth organizations and youth orchestras, they won't have agreements either.

Inclusive Stages has two categories of work, coalition building and data collection. Inside data collection, there were three projects that launched this past year, and we'll be focusing on one of them. So we're specifically focusing on — in this panel on coalition building and the Inclusive Stages project specifically called the Inclusion Index. So before we move into introductions of the panelists, I just want to give you a little bit of a structure for how the panel will go today. So each panelist will introduce themselves and talk about their experiences with Inclusive Stages project writ large, then we will move into a panel discussion, and I've got questions that are prepared that we will be working our way through.

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And then later in the session, you might have seen when you came in, a slide with a QR code to get into Slido, which is an app that you can type questions into. Later in the discussion, we'll put that slide up and folks can type their questions in, and we'll take some questions from you all that way. And then at the very end of the session, we'll also be able to pass a mic, Sam will have a mic, for anyone who wants to ask a question in live time. Okay. Alana.

ALANA WEISING: Good morning, everyone. Thanks for joining us here this morning. My name is Alana Weising. I serve as the principal timpanist with the Tucson Symphony Orchestra. And I also serve within the orchestra in a couple of different capacities. I am an ex-officio member of the orchestra committee as the president of the Local Musicians Union chapter Local 33. I am a member of our tenure review committee. And most relevant and important to our discussion this morning, I serve as the chair of the Musician Driven Equity Diversity and Inclusion Committee, as well as the co-chair of the organization-wide Inclusion, Diversity, Equity and Access Committee.

Our work with Inclusive Stages has been really impactful. And I'm really thrilled to be serving on this panel as a musician representative for this work, because I feel that the program has provided a very valuable and unique opportunity for cross-collaboration and communication across many different facets of the orchestra. It's very rare, unfortunately, to have opportunities where musicians get to interact more closely with staff or with members of administration. And this program provided many opportunities for that level of communication and awareness and collaboration in achieving these goals.

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The way that our orchestra decided to approach those goals was through involvement of those different facets. And so our CEO was leading a lot of these efforts, and also involved in conversations in how we traverse through this program and established and are seeking out to achieve all of these goals. We involved our music director, our vice president of artistic planning and operations, our orchestra personnel manager, our musician-driven EDI committee, as well as the organization wide idea committee.

We're all abreast of every step of the way regarding Inclusive Stages, all three main convenings and processes. Several Zoom meetings were conducted, or in-person meetings were conducted with some combination of personnel, which I just mentioned, in order to collaborate on establishing and how we were going to set all of these different goals. And our orchestra ended up coming up with — with five different goals that were — that are unique to us, which I think is a really important facet of this program as well, that we were able to determine goals that are very specific to the success and longevity of our orchestra and how we can be positively contributing to and advancing these ideals.

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And so I'll just broadly state these goals. Our first goal is to just increase awareness and engagement of the musicians in this work. Our second goal is to create as welcoming an environment as possible for prospective Spanish speaking musicians, with Tucson being uniquely located very close to the southern border. Our third goal is to actively work towards measurable significant increases in the numbers of musicians of color applying for auditions. Fourth goal is to include more substitutes and extra musicians of color to perform with the orchestra. And our fifth goal is to create a program or partner with a sister organization, or an existing education program whose goal is to support musicians of color through high quality, free of charge instrumental teaching.

And later in this discussion, I'm sure I can get into more details of the more specific ways that we are seeking to achieve those goals. But I think the power of Inclusive Stages is the fact that it was outlined so clearly and allowed all facets of the organization to collaborate and discuss and find actionable paths towards these goals. So I'm definitely looking forward to a more spirited discussion.

ROCHELLE SKOLNIK: That was fabulous. Good morning, everybody. I appreciated very much the musician involvement in this work was a defining characteristic of the Inclusive Stages initiative. And that focus made it a natural fit for the AFM and our US Symphonic Player Conferences, ROPA, as Alana referenced, and ICSOM to get involved. Our members and our leaders care deeply about this work, which is an investment in the future of our orchestras. It was super frustrating to have been prevented by weather delays from joining the session on Wednesday, but I was delighted to work with Kane and Sam in a variety of ways over the past season, and I appreciate the opportunity to speak with you today.

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A little bit about me. I'm a violinist and attorney, and as director of the AFM Symphonic Services Division, I lead a department that provides support to orchestra musicians and the AFM locals that represent them throughout the United States and Canada. Literally hundreds of orchestras and thousands of musicians. Now, although musicians were centered in the work of this project, one of the things I observed as I participated in the Inclusive — Inclusive Stages sessions was a certain amount of bewilderment and frustration from some managers at the difficulty of actually getting musicians engaged. And I'd like to take a few minutes to just speak to that challenge.

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Let me start by saying two things. First of all, you are not alone. And second, please don't give up. I'll be honest, we faced similar challenges getting musicians to commit the time and energy to serve on orchestra committees, negotiating committees, and in positions of local union leadership. And because we at the AFM are a bottom up, deeply democratic organization, and we depend on the participation of our members, that can create real problems. It's not that the musicians don't care about what's in their contracts. You know that firsthand. You know they do.

But orchestra musicians are among the most overextended people I know. Just listening to Alana's list of roles makes that very clear to me. And especially those musicians who are constructing careers, working in multiple regional orchestras, driving for dollars. They're always hustling. And even musicians working in 52-week orchestras are generally moonlighting as private or university teachers, because part of our ethos as musicians is in passing the torch to the next generation of young musicians.

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You add to that mix the demands of family, and time becomes even scarcer. So this is why it often ends up being the same handful of people who serve year after year on orchestra committees, and why it can be very hard to recruit musicians to participate in other initiatives and to serve on other committees. Again, I do not believe musician's reluctance in this regard is because they don't care, or that they fail to recognize the significance of diversity, equity, and inclusion to the future of their orchestras. But the reality is that, especially for musicians in those driving for dollars orchestras, committing any time on a volunteer basis to a project like Inclusive Stages is time they cannot spend earning money to pay rent, put gas in their cars, and feed their families.

So as I see it, the first challenge in getting musicians to participate in this work is to figure out how to make this work. Not just another volunteer ask. But to make it part of the compensated work musicians do. In much the same way, it is part of the compensated work your staff members do. The second challenge I see to getting musicians deeply engaged in this work is ensuring that efforts to advance DEI goals don't come at the expense of hard bargained existing contractual protections.

Now, these are things musicians care very much about, and which serve ultimately to protect all musicians, including those we are trying right now to invite onto our stages. And they serve to protect artistic integrity. Musicians need to know that you have their backs in this regard. That was another thing I very much appreciated and respected about the first phase of Inclusive Stages, the focus on actions that could be taken within existing contractual structures. But as this work progresses, and you inevitably begin to look at actions that would require bargaining, I urge you to work with your musicians from a place of complete transparency, honesty, and respect.

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What I have seen is that managers who embody those qualities are far more successful at getting musicians to consider alternative approaches and to engage in creative problem solving, both of which will be useful as we work together to advance these very important objectives.

PAUL HIGGINBOTHAM: Good morning everyone. Can you hear me all right? Excellent. I'm Paul Higginbotham. I'm from the Wisconsin Chamber Orchestra, and I'm on the board of directors. And I'm fortunate enough to also be on the board of directors of the League of American Orchestras. So I'm having fun. When we got into Inclusive Stages, we were already — we were already involved in — in other projects. And so we decided that, well, let's just — let's just do this, and really enjoy ourselves.

Well, it turned out to be a lot of work. But we've learned a number of things through this. One, and I appreciate Alana, what you — Rochelle, what you shared. It's really clear to us that working with the musicians is critical, especially those who are working with the CBAs, and trying to inculcate this whole sense of a buy-in into the concept of Inclusive Stages. At every step it has to happen. At the Wisconsin Chamber Orchestra, we have had a couple of town halls with musicians in discussing this topic.

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We have discovered that while there are a fair number of musicians who do not necessarily support this whole concept, there are many who do. And to keep this step going, we will continue meeting with the musicians and discovering other ways. And I love what's happening in Tucson. And discovering other ways and implementing them to try to continue to build that relationship. Because it's about relationships. You have to have open communication; you have to have transparency. And in Madison, we're working towards those goals.

One thing that we've done is work with Sphinx in recruiting at least subs to come play with us during our winter season, and as well as what we have called Concerts on the Square. It's a summary event spread over six weeks on our capital square outdoors. It's free. And it's an iconic event in downtown Madison. And it's been there for decades. So we try to bring musicians in to be part of that, get them exposed to what the WCO is, what Madison is about, and to and to also try to tie them in with interested musicians. Again, it's about relationships, and we're trying to build those relationships.

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A goal that we have is to try to inform 100 percent of the musicians of each stage of Inclusive Stages. And I'm very happy to see that the League is moving into the second stage. And that is something we will make sure that the musicians are part of. And another great thing that we're doing, and it's not necessarily changing who's on the stage, but it's a real beginning. The WCO has finished the first year of a wonderful five-year project of bringing in composers of color, and doing a concert with their work, recording it, and then releasing it live.

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We've done that already. We had a concert last fall with Bill Banfield and Patrice Rushen, which was very successful. We've released the CD, had a wonderful release party in March. And it's on Spotify for those of you who want to find it. Wisconsin Chamber Orchestra. A little plug. But programming is a critical part about who comes and who's even willing to come and work on the stage. So we're deeply looking into that topic and trying to make sure that we keep rippling out what we're doing in order to bring everybody in. I think that's all I'm going to talk about right now, because there's a lot more to say. Thank you.

STEPHANIE SANDBERG: I'm Stephanie Sandberg. I am the LGBTQ and woman owner of Accordant Advisors. I'm going to announce that because it's Pride Month for those who celebrate. Happy Pride. Anybody can celebrate, by the way, I was celebrating last night, I lost my name badge. So I'm going to take a few minutes to tell you about Accordant Advisors, who we are, what we do, how we collect and analyze data. I'm going to stop leaning over like this. And why we think that's critically important both to the process of building inclusive and belonging environments, but also to moving forward with the Inclusive Stages project, which we're thrilled to be part of.

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And I apologize for reading a lot of this, but some of it is data centric. I am the owner and I do know a lot about the work. But Dr. David Caruso and the team that actually lived with the research with the team for a year or so leading up to it aren't here today. So forgive if I — if I make any mistakes. So first of all, we were founded — and thank you for the introduction as well. But we were founded to bring rigor, analysis, and emotional intelligence to help build environments of inclusion and belonging. That's our MO. And that's our special sauce. The emotional intelligence you'll — you'll hear coming up as part of our process.

And it was founded on the notion that inclusion is the foundation for a diverse and equitable workplace, and we'll continue talking about you cannot have diversity or sustain it without having

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inclusion. Moreover, we believe that inclusion is a felt experience shaped by individual behavior, workplace culture, policies and practices where people feel a strong sense of belonging and psychological safety. So how do we think that should be accomplished? Through culture change. And I was thrilled to hear Simon mention yesterday in his remarks at Jones Hall, that while there has been so much terrific project work and continued innovation at American orchestras in the EDI space, we've been hearing about it, we've seen it.

Where are we heading now? Culture change. That's where we need to live. And now the focus does have to be on culture, for which there are no shortcuts, I'm sorry to tell you. There are, however, proven frameworks and interventions that can, in our experience, provide a blueprint for initiating and sustaining that positive change. So our process, as many of you know, perhaps in the room were part of the survey that was sent out last fall. We begin with the data.

We need to establish a baseline understanding of the current climate at your orchestra and the data guides our work. But gathering, interpreting, and contextualizing that data properly is critical. And how does one best measure and understand inclusion and belonging? And that's where the rubber hits the road. The Accordant research team spent literally the last three years better understanding and defining what inclusion and belonging are, one, and then, two, how best to measure them. And here's where they landed.

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First, you have some self-serving promotional documents from me on the table, but that on the flip side does list the dimensions of inclusion as we've defined them. Safety, respect, connection, acknowledgement, support, and empowerment. Second, they determine what should be measured. What do you measure? Those are the dimensions. What do you actually measure within them to come up with the deepest understanding? And they came up with perception, emotion, and behavior. So essentially asking, how do individuals perceive your orchestra? How do they feel about being part of your orchestra? And what behaviors do they observe people engaging in at your orchestra? The behaviors are the critical piece that we're going to come back to.

So in our data analysis, each dimension is measured against the perception, emotions, and — and observed behaviors. The final reports also include outcomes which we can talk about — which we can touch on, like job satisfaction, burnout, and engagement, all of which are critical data points to know how included your — your symphony members feel. So with this framework come the insights, which lead to pinpointed actions that you can take to — to enhance inclusion and belonging at your customer.

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Success, however, requires expert instruction, continued practice, and perhaps most critical of all, corrective feedback, or feedback of any sort. And Alana, I appreciated you, you talked about the engagement is critical, feedback is critical, constantly improving is critical. So we think this is the most promising aspect of Inclusive Stages. The data is fresh and authoritative, but it's the insights that the data generates, the defined behavior it recommends. Not the what, which we have a lot of now, but the how that will provide the foundation we think for real culture change.

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So the survey reports, which also provided benchmarking for those who participated within and across orchestras, musician and staff, by gender, by section, by tenure, racial identity, other such areas. They do provide, we believe, the first in-depth look at the state of inclusion for symphonies of all sizes in the US today. We had 60 orchestras. Woo, 60 orchestras participated. We received responses from about 3,000 participants, and that includes more than 800 staff members and almost 2,000 musicians, which is just terrific from the musician engagement piece. That's a — that's a wonderful, lopsided response that we love to see that we don't actually always see.

So what's the big picture? We'll come back to it. But two key takeaways. Musicians from all backgrounds reported lower levels of inclusion and belonging than orchestra staff. From all backgrounds. And our general survey population. May not surprise you, but it's just worth noting. Big data point. They feel less often empowered than staff. But staff report feeling more often worried, frustrated, and stressed than musicians. So that's the teaser. There's a lot more to come. But these are the — these are the kinds of data points that are certainly useful to start the conversation.

DAVID FISK: Thank you. Good morning, I'm David Fisk, the president and chief executive of the Charlotte Symphony. I'd like to give a shout out to my colleague Aram Kim Brian, who's here with me, who's our vice president of learning and community engagement, and a key partner for me in our work in this area. I'd like to echo a couple of points we made already. When we saw the results of our Inclusion Index participation, we found there was a lot of material to work with, some of it encouraging, some of it, frankly, disappointing.

We found that our musicians generally had a higher level of morale than our staff, despite the fact that we had been working hard to try to support our staff through the pandemic and out the other side. And a lot of the energy for this work within our symphony is coming from the musicians. So I want to recognize and respect that, because I'm about to say something about negotiations with the permission of our musician's negotiating committee, because we're in negotiations right now.

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So we found ourselves focusing on five goals for this season that reflected where we were in this journey. And they were around the areas of hiring practices and training, talent development, communications, and accountability. Working within the framework of our current CBA that was negotiated in 2022, where we incorporated the recommendations from NAS into ways in which we could use SOPA and NAS databases, we've now begun negotiations in 2024 to include the recommendations of a Black orchestral network. And we've had that document at the table being reviewed by both negotiating committees going through it.

And our musicians wanted me to say today that we were very proud of the fact we were able to incorporate the NAS recommendations in our '22 agreement. And it's fully my expectation that we will incorporate all the Black orchestral network recommendations in our 2024 agreement. And I give thanks to the musicians and their very thoughtful and progressive leadership, for being the ones who are pushing that, to make sure that we do live up to what we believe we're capable of, in improving both our hiring and our tenure practices.

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I also want to acknowledge the fact that we're getting initiatives from our musicians through ICON, whose conference this year is focusing on part of this work. To ensure that we would enable more musicians to come than simply a single representative. Because for musicians to work as a team, it gives them strength in numbers, and the ability to be more persuasive with our colleagues for advocating for change. So we'll be sponsoring more musicians to go to Icon this year than is normally the case.

In terms of supporting staff, we've been able to find some fairly low hanging fruit. But important steps to take this year, such as approving the implementation of LinkedIn learning for DEI training, and other aspects of professional development for all our staff. We've worked with a healthcare provider to incorporate a more robust provision for staff and physicians for behavioral health services. As part of our enforcement of the CSOs core values, which include welcoming, we have created fresh policies, such as for anti-gossip, that have been incorporated in our employee handbook, and published with other updates this summer.

And we're using the communication services that we have in our CBA to be able to provide training to address some of the areas of concern that we found reading our Inclusion Index. For example, around safety. We had a conversation about what does feeling unsafe look like for some of our

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employees. And we decided, as a result, the one thing we would do would be to have training on anti-shooter incidents, if they were going to help us to arrive at one of our open-air concerts. We found that was a point of concern and a worry for musicians and for staff. What do we do if we have an incident? Who's in control of the situation? How should we behave and respond?

So that was in the area of hiring practices and training. In terms of talent development, we've been working on two goal initiatives this year. Two of our musicians recommended through our innovation hub, which is one of our organizational committees, that we researched establishing a talent development program, as Alana was describing, to provide free tuition to talented students of color in the Charlotte area by CSO musicians. And those representatives are now taking the lead in exploring interest within the orchestra and establishing such a program and have already gathered expressions of interest from two string specialists, two brass specialists, a wind specialist to participate in developing a plan.

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The second initiative has been exploring the possibility of relationships with HBCU orchestral music programs to generate a pipeline for talent. A long-term strand of exploration for us is working with our local HBCU, Johnson C. Smith University, to support them in establishment of an orchestra program. Another more immediate opportunity is to research which other HBCUs within sensible drive time of Charlotte have talented students who might be added to our subs and extras lists by or — by audition or by invitation. And again, back to working within the framework of CBAs. Our third CBA allows us to reach out to add through the principals, musicians to our sub lists. But we also have the opportunity for extra auditions to be held.

And we reflected in these negotiations that we haven't been really doing that very much. So we've been relying too much upon who the principals know within their network, rather than having open extra auditions to see who's out there that we don't know about. So we have committed that in this coming year we will do extra auditions to try to unearth those who we ought to know about but didn't.

In the theater of communication, we've been focused on a plan to expand the availability of key organizational communications in Spanish. Fifteen percent of the Charlotte population is Hispanic. And that's now well underway. So far all of our CSO Roadshow, this is our mobile stage, event publicity has been produced in both Spanish and English and the concert is presented in both Spanish and English. And our summer pops concerts are now also being promoted in both languages on our website and advertising and in print. Next season we'll start promoting other main stage concerts in both languages.

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And finally, in the area of accountability, and this was in direct response to what we learned from Inclusion Index, we've been focused on improving internal processes. For example, we communicated the findings from the Inclusion Index survey in a very transparent manner. A companywide email was sent out with the high-level findings, and the full reports were posted on the musician's portal, the board portal, and the staff portal. So everybody had access to the raw material if they wanted to dive into the detail of it.

And the board, of course, was also able to discuss it at board meetings and through our board committee structure. We've created employee roundtables as an ongoing and additional listening channel, and to support staff morale. And we've been tracking metrics and progress with the DEI goals of our strategic plan. For example, our adherence to the management and physician responsibilities of the master informed audition protocols of our CBA, and the results of who's coming to take our auditions as self-identified in candidate questionnaires.

So in summary, I would echo what has been said, that it is very possible to make progress within the framework of existing agreements, and when you get to the negotiating table, that the energy come from both sides. Because it's there. And I'm extremely grateful to our musician colleagues for helping us make significant progress, I think, this year and to learn from each other. Thank you.

CARRIE: Thank you. So my first question, which has already been touched on by everybody, is really around how Inclusive Stages has been meaningful to you and your orchestra? So if you could distill it down, how has Inclusive Stages been meaningful to you and your orchestra? And Alana, we'll go to you first.

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ALANA: Yeah, just to reiterate a point that I had made earlier, I think it's been really impactful for Tucson Symphony, I can speak for specifically, because of this increased collaboration and communication and encouragement of said collaboration and communication. What Inclusive Stages did very well, and I think helped us do was to be more specific about not just the goals that we wanted to achieve and outline, but very specific steps that we could take to achieve them, and who specifically was going to be involved in various parts of the orchestra and leadership to achieve said goals.

And so there are very specific goals that we have outlined. So for example, for our first goal of increasing awareness and engagement of the musicians in the work that's coming from predominantly our EDI committee and our orchestra committee, a more specific goal or objective within that is to have at least one musician representing each section of the orchestra involved in the work in the EDI committee. That's been a very important goal of mine, is to recruit, you know, several string players and at least one wind, brass, percussion auxiliary, you know, piano, keyboard, harp player to serve on this committee.

And I think that that level of involvement and awareness is really important because different instruments sections have their own — their own struggles, their own unique needs. And so if everybody is aware of the work and invested in the work, then that can help improve and increase communication as well. Another — another facet that we're exploring is with establishing — because our EDI committee is relatively new. We've only really been going in earnest for this season and a bit of the previous season. That we're facilitating better communication and strengthening ties and awareness between our EDI committee and our orchestra committee.

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And improving and increasing that level of communication is really important because we don't want to step on each other's toes. We don't want to have any lines crossed. In terms of having a unified front or an understanding of communication and how we can best come together as musicians, to be able to understand and work through these ideals together, and then also bringing that to administration, into staff, and then being able to more effectively communicate and collaborate on those ideas.

Another one of our objectives, sort of piggybacking on what David was mentioning earlier, to a certain degree is creating other communication channels that encourage sharing information across various facets of the orchestra. I completely agree with what Rochelle had said earlier about transparency being a very important ideal in this work. Everybody should be on the same page, should want to be on the same page. And I think determining an avenue to be able to do that effectively is incredibly important.

We're also looking into implicit bias training, other bias training opportunities to regularly engage with in this work. And there are many other goals that we're seeking to achieve. But I think the biggest one, and the greatest impact that this work has had so far, is that increased and more frequent and meaningful collaborative spirit of communication across different facets of the orchestra.

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CARRIE: Thank you, Alana. Paul, to you.

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PAUL: Sure. The WCO has been working with a couple of musicians who have joined us in this effort. We're — we also have a couple of members on our EDI committee, who are non-voting members, but they work with us in discussing these topics. WCO is one of the few organizations in the country that has engaged in both the Catalyst Incubator program and Inclusive Stages. That makes it a little bit complex, because we're trying to achieve goals that are pertinent to each one of those projects. But we also try to bring those together in a way that serves the goals for both of them.

One thing that's really been very helpful is working on the topic of improving the culture within WCO. And culture is a really critical piece, because it really helps people to understand inside of themselves what they bring to the table, what others bring to the table, what their backgrounds are, and how that impacts their thinking. If you don't change the culture, right, from the ground up, and you try to start right from the top, it's not going to work. And so we have — we've now spent over two years working on that — on that issue. This year, our main project is trying to engage both the musicians and the board members, and trying to help people buy into the concept of EDI.

The WCO board is a strong board. And the board has done a great job in supporting the projects that we want to undertake. But it's — it's still not totally clear about how the Inclusive Stages project is going to be accepted, except insofar as the work that we've been doing with the five-year project. And I don't have anything more to say about that. Because we're — the issue for us is that we've got both of these projects simultaneously. And — and so there's some energy being drawn from both of them. We're not as far into it as we'd like at this point.

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But it's really clear that there are a number of musicians who have bought into and who are willing to work with us. The CBAa will really turn out to be a very important thing. Our issue, though, is that we're not — we're just still in year one of our CBA. We just negotiated the CBA. And it is my view that in order for a lot of Inclusive Stages to be successful, they have to be included in whatever negotiations we undertake. So for example, if we want to go out into the community with our musicians, with the idea of not only reaching out to the community but attracting musicians to the WCO, we're a service organization, and that makes it very complicated. Because as you are saying, there are — most of the musicians who play with a WCO play in other regional orchestras.

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A number of the musicians have difficulty participating in non-paid activity. And I'm sure that many of you have that as an issue. Ultimately, it's going to come down to either working with some of the musicians or asking them to volunteer some of their time, which is a really touchy topic, that ultimately is going to have to end up in the CBA. And given that we're only in the first year of a three-year contract, it's going to make it a little bit more complicated for us to achieve some of our objectives.

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But one thing that's also really great is we're — we are taking a look at both the tenure and in the audition practice. And we're in the early stages of that. But those are critical parts. Looking at where you recruit people for auditions is very important, vastly important. I spent a number of years supervising the county's affirmative action program. And I learned through that — through that process, that you can have a great job description, you can have a test that works really well, but if you don't go out and recruit in the right places, you're not going to get the right people to come. If you fish in this pool, and everybody else is over here, you're not going to get them.

And it's my view that, as orchestras, we have to really think through where we're recruiting. I like the fact that you're working with HBCUs. I love that idea. And there are many other colleges and universities and — and even high schools,. I think working with students in the pipeline is critically important. So we're — the WCO is really trying to take a really broad look at how we improve bringing in musicians of color. We're still in the stages of putting all of that together. And we're still trying to put together a clear plan of attack. But what's really helpful and productive for us is that people are really committed to it, committed — and in their heart. And if you don't have folks committed to it in their heart, it's not going to work. So that's all I'm going to say.

CARRIE: Thank you. David.

[0:41:58.3]

DAVID: So the question was, how has the Inclusion Index helped us this year?

CARRIE: The question is, how has Inclusive Stages been meaningful? Yeah, thank you.

DAVID: I think for us, it was a very helpful bolt of energy into our DEI work. We've had a DEI rollback in place that focuses on which strategies within our strategic plan are directly relevant to making

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progress in this area. But what we got from Inclusive Stages, and from the Inclusion Index, in particular, was a vast amount of information to work with. And obviously, as a CEO, I was homing in on some key questions about how people feel about working for the organization. We were very happy to feel that people were proud to work for the Charlotte Symphony.

But I was also alarmed to find that a lot of people were thinking about looking for another job. And there was a sort of dynamic there, which was complex, and needed a lot of attention and thought. So it was a very important study for us to have. And I think that it's given us a lot of information to work with that's helped our work this year.

CARRIE: Thank you. Rochelle, can you tell us how this initiative has aligned and complimented your goals and your member's goals?

ROCHELLE: So it was very interesting to hear Stephanie enumerate some of the — the characteristics or qualities that support inclusion. It made me think about the way in which inclusion and having that sort of culture of inclusion makes a workplace someplace that everybody is happier to be in. It's not just about people of color, or, you know, people who are not traditionally represented in our workplaces. And the AFM, of course, is, you know — our central focus is about making the lives of musicians better.

[0:43:42.9]

So this work, which is really focused on — on changing our culture within orchestras, as several of you have already said today, really does have the potential to benefit all musicians in a — in a very deep and meaningful way. And I see that also — you know, David, you were talking about the adoption of the Black orchestral network guidelines. And for those of you who are not familiar with them, these are guidelines about how we can change our probationary and tenure processes to be more transparent and more accountable, and — and, you know, lots of other things.

And, you know, one of the things that I've seen for a long time is that those probationary processes really don't benefit anybody. I mean, they're — I mean, yes, they are extremely difficult and onerous for musicians who are not typically, you know, historically represented in our orchestras. But I can't tell you the number of calls I've gotten from white men who have also suffered through these probationary processes. They don't work for anybody. And so to the extent, you know, the work that we do in Inclusive Stages encourages us decisions and — and managers to adopt practices and culture changes that are more humane for everyone.

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This work absolutely aligns with the AFM's work and values. We are, you know, fundamentally as unions are, a social justice organization. We're also all about information sharing. And that's another key piece of this. And of course, our musicians are deeply invested, as you know, perhaps the most — the people with the most longevity in our orchestras, and the people with the most to lose if orchestra culture doesn't go well. Musicians are deeply invested in the future of orchestras. And this work is obviously very closely aligned with all of those things. So yeah.

CARRIE: Thank you, Rochelle. Stephanie, can you tell us a little bit more about how data can support EDI initiatives in general, but then specifically around the Inclusive Stages Project?

[0:46:02.8]

STEPHANIE: So data is your GPS in this work, right? I mean, one thing we talk about a lot is you can't go from here to there without knowing where here is. And then through analysis and direct feedback to provide the insights and actions that it suggests. So for the — for the Inclusive Stages program in particular. So if I were a board member, and correct me, Paul — we had a robust discussion beginning. If I were a board member, let's say, and we're funding EDI work, and that's a different conversation maybe to be had, around compensating this work. It's a tough nut. Just come back to it.

But anyway, if I were on a board, and I see these initiatives taking place, I would want clear measurements of planning progress, I'd want a timeline, and the data and the insights, of course, then the actions it recommends, is your friend, and is a friend to this Inclusive Stages process. Because, to use one example, you know, like one question we asked on the survey, as you guys saw, is whether people will recommend your orchestra to others as a good place to work. Which is proxy for a lot of important things, right?

Because from the data, we now know that certain behaviors increase the likelihood of someone recommending your orchestra as a good place to work, which for inclusion and belonging, drives hiring and retention in the non-orchestral world, but certainly in the orchestral world as well. And that's a good thing to know. And it's a concrete insight that would help inclusion at all orchestras. So we have specific work going on with shared insights, of course, that this report has made possible through Inclusive Stages.

And I'm just going to say what those behaviors are, because I have them in my notes. Recognition by leadership. Being able to implement a suggestion. This implies asking for and responding to feedback. And the trap that some leaders fall into in particular is saying, we want to know your thoughts on this, and then when the survey comes in, they don't have the courage and the humility

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and the transparency to actually share it out. So, thank you — thank you everybody who's done that, on this panel in particular.

[0:48:15.2]

And as your mother would say, a simple thank you. This all sounds commonsensical, and it is, but we literally ask what behaviors — when was the last time someone thanked you? We have that measurement across almost 3,000 people, and it matters. And then getting constructive and helpful feedback. So just to pull out, again, it's about these behaviors, and for Inclusive Stages, there's now a specific picture, a narrative from which to advance, right? From examples like these, for best practices, and industry-wide trends, which we can now begin to track.

CARRIE: Thank you, Stephanie. So thank you to folks who have been posting questions in our Slide-o and also who've been up voting. So if you like a question that's on there, you can also thumbs up it and it'll tell me that you've — not you in particular, but that somebody or multiple somebodies have liked questions. So we have a question here, which is — it's several people have asked, so it's a combination of multiple questions, which is, how are both orchestras thinking about disabled, divergent, deaf, or hard of hearing musicians, staff and audiences when you're thinking about inclusion? And in particular, how do you make sure that that thinking is happening and behavior's happening there, and prioritizing, making sure that musicians of color are increasing, and that diversity of stages are increasing? So how do you hold all of that, right? How do you hold the needs when you're thinking about diversity, equity inclusion, and to access, and still prioritize musicians of color?

[0:49:59.9]

PAUL: You know, if I was in court, I would ask counsel to break it down to each question and then address each one in turn. Well, I can't object, I can just simply say, counsel change what you're doing. I can't do that today. [LAUGHING] For those who are lawyers, I'm sure you understand what I'm saying. This is a very complicated question, I think, because it — it involves a number of processes that, you know, could exist simultaneously.

One thing I know that the Wisconsin Chamber Orchestra, we've already — we've done some initial discussion about inclusivity being — bringing in various certain groups. LGBTQ, disabled people. But we're just in the early stages of that discussion. We're really very focused still on what Inclusive Stages is targeted towards, which is musicians of color. But there's this recognition, this understanding, that if we're talking about inclusivity, it has to be broader than that.

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I know that the League is focusing primarily on musicians of color, because that's — historically has been a real problem. You know, and — you know, the data is out there. And so we're working on that, we're moving forward on that. But I can — I can even see, though, as the second stage kicks in, that is going to be necessary to broaden, to — you know, to other groups who have not necessarily been included through — through the years. In terms of working with musicians who have hearing issues, we're not plugged into that at that point. But it's a really good question, because it raises the point, we have to take a look at that.

[0:51:58.3]

My sense is, and I'm just speaking for myself, not even for the organization, is it's going to be important to take on one primary project at a time, get comfortable with that, get successful with that, and turn our attention to other groups who are having issues. And — and even Inclusive Stages does not necessarily mean we can't stretch out and talk about things, about audiences having difficulty hearing. I have a hearing problem. And sometimes I can't hear. And so I'm really sensitive to that. But it's — I think this is a challenge, trying to balance all of this simultaneously. But it's a good question, because it just brings to the floor the importance of taking a look at all of these issues. And I want to thank you for that.

ROCHELLE: I'll just add to that. You know, we do already have lots of musicians in our orchestras who are neuro — neurodivergent. We have musicians who have hearing problems and other disabilities. And I'm just going to sort of reinforce what I said earlier, which is that the work that we do in this regard, to make our workplaces more inclusive, should have a follow-on effect to make our workplaces more inclusive for those musicians as well.

CARRIE: Thank you, Rochelle. So here's the tension question. Tension between wanting to make immediate change and thinking about musicians of color who have not been hired with the regularity that is maybe desired. And the idea of making sure that the culture of the orchestra is inclusive. So thinking about both bringing more diversity to our stages and making sure that the orchestra is more inclusive. The question relates to how do you make sure that culture change doesn't become a delay tactic?

[0:54:18.7]

DAVID: Well, I don't know about everybody else, but I feel a sense of burning urgency to make progress in this work. And there is no excuse for delay. And I say that from a number of perspectives.

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A, because it's the right thing to do. But, b, because to tie this into other conversations that are happening at this conference, there's a lot of conversation at the moment about the business model changing or evolving to be less dependent upon earned revenue are more dependent upon contributed revenue.

Unless we diversify our audiences, unless we diversify our stages, we have no future. Let's remember that. And the urgency that I feel is about addressing the vibrancy of the orchestra on stage, along with the vibrancy of the orchestra financially. And the two are inextricably linked. Charlotte is the — I think the seventh most diverse city in the United States. We have 40 percent white, 35 percent Black, 15 percent Hispanic six percent Asian. It's also a growing city. Almost a million now, forecast to be significantly larger by 2050. As it grows, it's going to continue to get more ethnically diverse. And if we at Charlotte Symphony don't make urgent progress in reaching more diverse audience, we're missing out in a way that could be fatal for our organization. That's the urgency I feel.

[0:56:07.0]

SPEAKER: Yeah, I just wanted to add, I think that the power of this Inclusive Stages work can also be felt in how it can be applied to your specific orchestra and your specific city or region. And just a reminder that having that diversity and working to be orchestras that are applying the findings of the results of this work to your specific orchestra, to your specific region, that one of the cornerstones of the TSOs specifically is to be an orchestra that reflects its community and is in service of the needs and the backgrounds and identities of its community.

And so a lot of the goals that we have set in Inclusive Stages seek to reconcile with that. And just for me, personally, just to — just to have my own little point in here, separate from any — any work in this. I think it's really important to not just consider the work that needs to be done at the individual orchestra level, which is what this survey is seeking to do, but a lot of the goals that have been set, and at least hearing about Tucson and Charlotte is really reassuring to me, is creating that pipeline. Creating those communications and those opportunities for students and children at younger ages to be able to have access and have opportunities and be able to see professional orchestras perform, engaging with the musicians on that stage.

[0:57:55.3]

It's really cliché, but I think there's great power in the saying, seeing is believing. I think that having people on our stages and working in orchestras in various capacities is empowering. And to get people involved in that process at younger ages I think is incredibly powerful. And obviously with this

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work, specifically, we're doing our best to address that at the musician level, at the administrative level, at the board level, to try and reconcile with all of that at the highest level of music making.

SPEAKER: So I just want to add that I don't believe it's an either/or. Of course, there always will be competing tensions, and I'm not here to tell leaders how to run their organizations. But I am here to reinforce what the data suggests. Another obvious point. If the leader doesn't embrace and lean in and have humility and transparency, I keep saying that, but foster trust. The maestro yesterday, after the remarks from John and, I think, Simon, what did he say? He said, "We have to build trust. We have to have trust." It was the first thing he said, it was just fantastic.

And it shows a culture, not only belonging and inclusion, but emphatically embracing this kind of culture change. And so I'm sure there are people who can obfuscate and kick the can down the road by saying, yeah, we're doing these big things. But as you've heard from these leaders in particular already, and the participants, not at the expense of the — of what's right in front of you. It's in service of this longer journey.

CARRIE: Thank you.

PAUL: As I explained a little bit earlier, working with the Incubator program, we've spent a fair amount of time on culture. Now that Inclusive Stages has kicked in, we're joining both of — both of those projects. We don't believe that we have to give up our work on culture and not turn our attention to Inclusive Stages. They coordinate. You can coordinate those. They work together. Because overall, you're building a broader culture that will reflect your community. So I don't see a reason to delay the work on Inclusive Stages while we're working on culture. And culture is a very, very important underpinning. It's the foundation upon which everything else is built.

[1:00:30.2]

And if you haven't worked with the culture in your organization, what's happening in the organization, the interactions, the — the power dynamic between the musicians and management and staff and the board, then you're going to — you're not going to succeed. The work you're trying to do an Inclusive Stage is really tricky stuff. Because there are a lot of musicians — a number of musicians, not all of them. But there are some musicians who are really concerned that Inclusive Stages is a danger to what they're doing. But it's not. It doesn't have to be.

And that's something that we're trying to communicate over and over again to our musicians. But some of the resistance we're receiving from them is that it puts their work at risk. So if we're not  
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working on the culture piece, that's going to continue to be a mindset. That is going to be a barrier to us making progress in the area of Inclusive Stages. So for those organizations who are not really clear about whether or not you can work together on both of those processes, I encourage you, join them together, because they're integral to success.

CARRIE: Thank you. So Sam will be circulating across the room with a microphone for anyone who would like to ask a question vocally. Yes, we've got one question. Thank you.

[1:01:59.5]

SAMMY: Hello, I'm Sammy. I work with the Amarillo Symphony. So something that I kind of believe that helps have more diversity in the orchestra, especially in our community. Many people stay in the area, you know, they grow up in the area. So I always feel like when you foster education to, you know, diverse groups that then, you know, in 20 years helps build the orchestra. Something that our organization has is a scholarship specifically for minority groups, Black, Hispanic, and Asian students, to go to music camps in the summer.

It's something we've done for like a couple years. And I'm just wondering if you guys have any ideas about how to better foster that, how to — you know, how to make that scholarship successful. We've gotten like maybe one application each year, and it's like, okay, so you get it, you know, because you're the one application. Amarillo does have a very high percentage of Hispanic population. And of course, there's the Black community. I'm sorry, I don't know percentages. But do you guys have any opinions on scholarships and kind of fostering, you know, music education in the areas and how that can — you know, if you have any experience or insight on that?

DAVID: Well, I'll take that question, and thanks for it, as a chance just to acknowledge where we have success already. We have Inclusive Stages in our youth orchestras. Many of us. And I think that success should be both celebrated, but also remembered as the way to keep building our focus as a field on the pipeline of learning. Because if we cannot lose the participation that we're getting at the youth orchestra level and help steer and guide it all the way through and out the other end of higher ed into our audition pools, then we've solved the problem. But it does take interventions of the kind you're describing in a very thoughtful way. And a very genuine, authentic relationship with the communities that you're trying to pull from, to be able to attract that kind of participation. But I would encourage that sort of program.

SPEAKER: Can I add one thing? So one thing that one of our larger clients has initiated is a mentorship program, buddy program, By Musicians for Musicians. And again, it doesn't solve the

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extra time problem. But it does get at — and it's actually been warmly sort of accepted. And to your point, it furthers the connection with the community and bringing — you know and bringing kids right into the orchestra is exciting.

PAUL: A few weeks ago, the WCO did a joint project with the Wisconsin Youth Symphony Orchestra, which has really this fabulous program called Music Makers. It's targeted to high school kids of color, and giving them instruments, and working with them intensely. And it turned out to be a great program. But what's one — the big projects that we did with Wisconsin Youth Symphony Orchestra, which I believe we do every couple of years, is to have the students work with some of our musicians in rehearsal, and then putting on a performance.

I will — I keep talking — and I like the discussion on pipeline, because that is such a critical piece. But it's — it's a long-term strategy. And long-term strategies are very important. But it doesn't deal with the urgency in changing our stages today. So I'm not going to keep belaboring the point. But we — but I like the idea of what you're doing and trying to feed the pipeline, which is what I keep saying. You feed the pipeline; you know?

But one thing I'm going to — I want to talk about, and David, you've made some really good points. You know, I really think about — think about this for a minute. If the orchestra's don't change, it's like a business that was successful for a long time, and then, you know, maybe the profit margins are getting smaller, sales are dropping. If they don't figure out another strategy, they're not going to stay in business. We have to change our strategy.

[1:06:36.5]

It's imperative that we look in every single nook and cranny to figure out what's working, what's not working. And I encourage everybody in here to talk among yourselves to try to achieve that. But it has to change. And so this sense of urgency of trying to get folks onto the stage can only be done if we all putting our heads together to make it happen.

ALANA: I would say, just to add to that really quick, just making sure that there are ways that you are directly ensuring that your orchestra has to — has engagement with the students or with potential applicants to these programs. And so there are a lot of orchestras that have either designated full orchestra weeks in their schedule or several chamber ensembles that make their way into the public schools or make their way into other programs in the community. So even if opportunities exist, and it's presented for them to be there, sometimes it's more helpful to sort of lead their hand to it and reach and meet them where they are.

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[1:07:43.5]

So exploring those kinds of programs also ensure a greater long-term success. The frustration, as many have pointed out, is that it is sort of a snail's pace strategy. But I think that it will pay dividends in the long run. And students who are engaging with the orchestra in that capacity, where musicians are directly coming into schools or into other programs, collaborating with other programs in the community, ensure a greater likelihood of success that they will find this scholarship program. and more deeply engage with your organization.

CARRIE: Thank you, Alana.

[1:08:21.4]

SPEAKER: First of all, I just want to thank everyone on the panel for their work and their passion around making our field better. And that includes the pipeline aspects, that includes the changing of the culture for everyone to feel seen and heard and embraced. And that's all very important. However, the main reason for this program, Inclusive Stages, addresses the lack of generally racial and ethnic diversity on the stages of our orchestras. Understanding, as was noted from the panelists, that each orchestra has its own diversity need. And so that diversity need, whatever that is, you know it better than I would know it, has to be addressed.

And so my concern is that I'm not hearing anything about the urgency of hiring the musicians who are out here now to fulfill your diversity need. Education is great, it's very important. Again, I'm not poo-pooing any of it. All of it is really lovely. But it has the potential to distract or dilute the razor-sharp focus that our field needs to have. Because we all know this, our audiences come and say, are there are no Black people who ever play this instrument?

And our field is embarrassingly silent on our own earned history of discrimination, and our part in that. And so the fact that we are not addressing the possibility of hiring your diversity need now, especially when the history of our field includes people playing auditions in apartment for conductors with nobody else on the list and getting the job right there. The privileges that have existed in this field alone should not — should encourage us to think more creatively about solving Inclusive Stages. I'm not against it being inclusive for everyone. I think that's beautiful. But job one is job one, and I am not hearing how we're addressing that.

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[1:10:26.0]

CARRIE: Thank you. So let me ask that question. So for each of our panelists, I'm going to ask them to answer from their perspective. Why is it crucial to you that we address racial diversity within orchestras now?

DAVID: Well, I'll try and be as quick as possible. We just appointed Kwame Ryan as our new music director, the eleventh in the CSO's history. He's our first Black music director, and it was seized upon by the media, and he was often asked, "Why do you think that's the case? How does it feel to be the CSO's first Black music director?" And his answer has been consistently, "What took them so long?" Same answer for you, Aaron. We're trying to make these changes, but we have to do it within the framework of the CBA.

Getting them to audition requires us reaching out and asking people, inviting people to have come an audition for us. And that's built into our CBA now. It's a responsibility, both management and musicians, to find musicians who might be interested in applying for this position and asking them to come audition for us. Then we can do it through appointments. When we have vacancies, let's see where we can make appointments. That goes Black musicians the opportunity to become part of our orchestral family.

And then let's make sure we're providing a welcoming enough culture that they want to stay. And don't try and give an audition somewhere else. We've learned from failure in that regard, too. And then we have the extras in the sub lists. So there's not just one level. There are several levels we can pull, and we have to pull them all at the same time to effect change now.

[1:12:00.4]

PAUL: David, thanks. I'll touch on — and thank you, Dr. Flagg, your point's incredibly well made. Inclusive Stages is targeting Black musicians. That's where it is right now. And as I indicated earlier, it behooves us to broaden it as time goes on. But this gets back to what I was saying earlier. It's — it's where you recruit. What are your audition practices? And this gets really very tricky because of CBAs. The audition practices. Where you recruit isn't. And that takes creativity.

I had spent some time a few months ago really thinking broadly to myself about, well, how do you do this? So if we're only looking to Sphinx as a source, well, we're limiting our pool. So we have to broaden that pool. But it has to be aggressive and assertive. And it has to — it has to come through communication in a way that can reach out to potential musicians. And it has to be done in a way that



also expresses to the musicians, this is a healthy culture for you to come and work in. We want you there. Okay, now one of the musicians who participated in one of town halls talked about mentorship, and the importance of connecting with new musicians who come in to help them feel welcome.

Because we're talking about inclusivity, all right? Inclusivity. Making you feel included, welcome, safe, you want to be there. So it doesn't work for — to bring folks in. You've got to keep them. And you have to — but that is critical to the whole notion of culture. So think broadly about where you're recruiting. Because that's really where it all starts. If you don't go there, nothing is happening on this other end. But I certainly know that through our own auditions. I think they can be improved in a way that increases the probabilities that we're going to get more Black musicians onto the stage. But that's a much trickier proposition. And it's not an area that I'm really sophisticated about. And many of you are. But I think that is certainly a topic that requires deep exploration and action.

[1:14:31.8]

CARRIE: Alana, do you want to add anything from your perspective?

ALANA: Yeah, I mean, I — I personally resonate with all of the points that you brought up here. I think it's a very fine line that we're trying to traverse and figure out and walk here, because there has been an increased push over the last, you know, 30, 40 years, but especially the past, you know, four or five years, for screens and auditions to stay up throughout the process. And the reason for that is to help eliminate and reduce any potential bias. In this case for Inclusive Stages, at this current juncture, we're looking to eliminate racial bias.

What that does, though, prevents us from knowing identities of musicians who are auditioning for us. But it's sort of that trade off of, okay, how can we get to a place where we can increase the amount of musicians of racial diversity on our stages, while also still adhering to and upholding as a standard for ethical operation a fair and — a fair audition for all parties involved? There are a lot of ongoing conversations that are happening surrounding the audition and tenure processes in orchestras. And I think it's something that needs to continue to be a conversation.

[1:16:13.2]

But I also keep coming back to this point about a pipeline. I — in my experience, you know, working as an educator, there — there are increased amounts of Black students coming through the pipeline. At some point in time, they become discouraged or disenfranchised with the process because they don't see themselves on stages. I certainly didn't see anyone who looked like me — playing on stages,  
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doing what I do, and I still don't. And so it's about instilling that that confidence that seeing is believing and addressing these principles at all different levels.

But I think they're very nuanced conversations that need to be had. And I don't think it's a — it's an easy fix, a quick fix, and that they need to continue to be explored. But I'm also very much in favor of ensuring that our audition processes remain equitable and fair for all, while also still working in service of the goals of this program.

CARRIE: Thank you. Thank you everyone for being here today. I'm just going to encourage you as you're leaving to chat with your neighbors and to do some wisdom sourcing and make some connections between yourselves. We'll be up here for just a few minutes if you want to come up and speak to any of us. Thank you for your time and your energy today. And thank you to our panelists.

DAVID: Thanks so much, everyone.

[APPLAUSE]

### END OF TRANSCRIPT ###