



fearless
journeys:
innovation
in five
american
orchestras

A publication of
League
of American
Orchestras

Made possible by
MetLife Foundation



ASO Theater of a Concert—*La Bohème*
at Verizon Wireless Amphitheatre

f e a r l e s s
j o u r n e y s :
i n n o v a t i o n
i n f i v e
a m e r i c a n
o r c h e s t r a s

By Lela Tepavac, Ph.D.

Edited by Catherine Maciariello

© 2010 League of American Orchestras

Permission is given to duplicate this document for personal use only, as long as it is unaltered and complete. Copies may not be duplicated for commercial purposes. Unauthorized posting of League of American Orchestras documents to a non-League website is prohibited. League documents are protected under copyright law. For information on additional copies, reprint, and linking permissions, please email member@americanorchestras.org.

Published in 2010 by the League of American Orchestras
33 West 60th Street, Fifth Floor, New York, NY 10023
americanorchestras.org

10 Digit ISBN: 0615338526
13-Digit ISBN: 978-0-615-33852-1

MetLife Foundation

MetLife Foundation was established by MetLife to continue the company's long tradition of corporate contributions and community involvement. The Foundation supports programs that improve education, promote health, encourage parental involvement and family engagement, help revitalize neighborhoods and stress accessibility and inclusion. The Foundation contributes to arts and cultural organizations across the United States, with an emphasis on increasing opportunities for young people, reaching broad audiences through inclusive programming, and making arts more accessible for all people. For more information about the Foundation, please visit its web site at www.metlife.org.

League of American Orchestras

The League of American Orchestras leads, encourages, and supports America's orchestras while communicating the vitality and value of orchestras and the music they perform. The League strives to stimulate the exchange of ideas and practices, promote innovation, and foster unity across the orchestra field. The League delivers meaningful information, learning and leadership opportunities, grass-roots advocacy and other services to its diverse membership, which encompasses nearly 1,000 member symphony, chamber, youth, and collegiate orchestras of all sizes. Founded in 1942 and chartered by Congress in 1962, the League links a national network of thousands of instrumentalists, conductors, managers, board members, volunteers, staff members, and business partners. Visit americanorchestras.org to learn more.

*Fearless Journeys:
Innovation in
Five American
Orchestras* is made
possible by a
generous grant from
MetLife Foundation.

MetLife Foundation

Additional support for *Fearless Journeys* is provided by a grant from the National Endowment for the Arts.



NATIONAL
ENDOWMENT
FOR THE ARTS

contents

5 About the Author

6 Foreword: Why “Fearless” Journeys?

7 Introduction

Case Studies

12 Los Angeles Philharmonic

For the People: Democratizing Artistic Vision

26 Memphis Symphony Orchestra

Service to Citizenship: Building Artistically Engaging
Community Partnerships

40 Pacific Symphony

Illuminating Meaning: Putting Music in Context

56 The Saint Paul Chamber Orchestra

To Boldly Go: Creating a New Artistic Leadership Model

72 Atlanta Symphony Orchestra

From Silos to Synergy: Building a Collaborative Organizational
Culture

Conclusion

86 The Road Less Traveled: Toward a New Foundation

96 Acknowledgements

98 Photo credits



Practice makes perfect! Leading From Every Chair® participants practice before performing their compositions before the entire workshop

about the author

Dr. Lela Tepavac is the president and founder of Fit Leadership, a consulting firm dedicated to helping companies and their leaders make the best personnel choices for top roles and build cultures that can attract exceptional people and fully leverage their talents. She has developed several proprietary Fit Leadership methodologies and models, such as: "Leadership Due Diligence: Are the Leaders Fit to Lead?" and "Leading Creative People: Building an Organization to Enable Innovation."

Dr. Tepavac was a Partner at Mercer Delta Consulting for thirteen years (1993–2006), working with executives of major corporations to strategically design and execute organizational change. She specialized in the areas of executive leadership assessment, CEO evaluation and succession, organization assessment and diag-

nosis, organization culture change, intellectual capital building, and change metrics. She has worked with numerous Fortune 500 companies across the media and entertainment, publishing, banking, airlines, retail, insurance, pharmaceuticals, medical, manufacturing, and high technology industries. Her clients have included The New York Times, PepsiCo, United Airlines, Time Warner Company, Citibank, Credit Suisse Asset Management, American Reinsurance, Best Western International, Shell, Texaco, Saudi Aramco, Bristol-Myers Squibb, The Limited, International Paper, Lucent Technologies, Ford Motor Company, Corning, Unilever, and Raytheon.

Before joining Mercer Delta, Dr. Tepavac held a research position at Columbia University and worked in the areas of conflict resolution and mediation. She has led a number of studies at the Institute for Social Policy in Zagreb, Croatia, and has consulted to several United Nations

agencies on diverse topics. A contributing author to a number of articles, she is a current member of the American Psychological Association, NYHRPS, and Women on Wall Street.

Dr. Tepavac holds a PhD in social/organizational psychology from Columbia University, an MA in social psychiatry from the School of Medicine in Zagreb, and a BA in liberal arts from the University of Zagreb.

foreword: why “fearless” journeys?

As I think about innovation in orchestras, I’m reminded that there is something wonderfully certain about the way that orchestral concerts are prepared. Musicians resolve technical challenges, fine-tune coordination and collaboration, and align vision—often in the course of three days and four rehearsals. On the evening of the third day, they turn out an exquisite performance. Mission accomplished! This creation of performances is the absolute center of the work of the orchestra organization. Is it any wonder that this field has been fiercely attached to longstanding practices?

The same predictably good outcomes have long held true for orchestras’ operational structures. The modern American orchestra was built on a body of practice that emerged to successfully deliver more and more varied forms of orchestral experiences to a growing audience. The refinement of skills in fundraising and marketing, the building of sizeable endowment funds, introduction of new “product lines,” deepening engagement in education—all of these helped to create an infrastructure that supported growth,

relative stability, significant improvements in compensation and working conditions for large numbers of musicians, and most importantly, more service to American communities.

Yet as this goes to print, many orchestras are struggling. They are buffeted not only by economic turbulence, but also by the accelerating rate and degree of change in technology and in American culture. Even the orchestra field’s three unwavering values—the commitment to excellence in all areas, the primacy of virtuosic leadership, and the adoption of best practices—no longer are enough to sustain many orchestras as they confront the enormity of change in the environment.

This is why orchestras have—sometimes reluctantly—turned to innovation. Today, experimentation and change are no longer organizational rarities among orchestras. Of the many fine examples of promising innovative strategies, we chose five that represent the diversity of size, geography, and approach that characterizes American orchestras today. In the sixth chapter our researcher captures the commonalities among them to reveal a new organizational and leadership model for orchestras.

No one is claiming that these innovative strategies are a silver bullet; in fact, some of the orchestras in this book continue to confront major challenges despite their good work. Rather, “promising innovation” in this context

is defined as new practice that helps orchestras continue to fulfill their missions amid the reality of shifting environments, and enables them to be more flexible in adapting to change.

The League of American Orchestras views this book as a beginning. We hope that it will encourage all orchestras and their stakeholders to reflect on their own capacity for innovation, and to pursue it at all levels of organizational activity. It is also a call to action. It is time to accelerate the recognition that orchestras must embrace innovation if they are to continue offering exciting musical experiences that are vital to American life.

Jesse Rosen
President and CEO
League of American Orchestras



introduction



American orchestras have long defied predictions of their imminent demise. They have consistently met difficult challenges with creative leadership, successfully managed their complex institutions, and developed new sources of revenue to sustain their business models. This problem-solving journey has taken the field in rich new directions in recent years as orchestras across the country have accelerated their efforts to test new approaches and explore unconventional ideas.

Orchestras arguably have never needed this new thinking more than they do today. Faced with continuing challenges to their operating models, they are working hard to keep the art alive as a vital component of American society. In 2006, the League of American Orchestras committed to help orchestras build their capacity for innovation, as part of a strategic plan

that also called for driving research and development and fostering the exchange of ideas across the field. In 2008 the League initiated a study, made possible by MetLife Foundation, with additional support from the National Endowment for the Arts, to explore and document promising innovation in American orchestras. The purpose of this research was to understand the organizational enablers that underpin such innovation and stimulate the sharing of best practices across the industry. The League appointed a Steering Committee from the field to oversee the study and provide guidance to consultants.

Research Process

The principal investigator for the study was Dr. Lela Tepavac of Fit Leadership LLC. An organizational psychologist, Dr. Tepavac created a conceptual

framework for the research based on a review of existing innovation literature, her knowledge of innovation models in other industries, and interviews with fifteen experts in the orchestra field. She developed a working definition of innovation in orchestras and identified initial innovation criteria. Concurrently, the League administered a short survey to member orchestras, asking them to list and evaluate their innovative activities across a variety of areas. From among the 150 responses, the League and project Steering Committee selected five orchestras to participate in the innovation study.

Researchers visited all five orchestras in March and April 2009. Using the innovation model and data collection tools developed by Dr. Tepavac, they interviewed approximately 20 people from each orchestra, and a total of 94 people across the entire cohort. Included in these interviews were CEOs, music directors, board

members, musicians, staff, external collaborators, consultants, and community stakeholders. The interview questions varied across participant groups, depending on their roles and responsibilities with regard to innovation activity within the organization. Researchers used the interview process to document the emergence and implementation of innovation within the organization, critical success factors, impact, lessons learned, and future plans, along with orchestra history and context. They also conducted several focus groups with musicians, staff members, and community representatives.

The researchers then analyzed the interview material using a specialized computer application for processing qualitative data. They created a case study framework to organize the vast amounts of information, and drafted case studies based on the qualitative data analysis. A member of the Steering Committee served as the first reader for each case study. Once this initial process was complete, the orchestras reviewed final drafts for clarity and accuracy. The overall analysis, as well as the distillation of lessons learned from the five case studies, was a collaborative effort between the researchers and the League.

What Constitutes Innovation in an Orchestra?

Innovation in today's orchestras is characterized by aggressive questioning of long-held orthodoxies and traditions and the emergence of new approaches to all aspects of the traditional orchestra model. According to Dr. Tepavac, innovation in orchestras refers to *purpose-driven and context-*

based activities or processes that, following new pathways, transform the orchestra in ways that create sustainable value, inspire and engage internal and external constituents, and respond to the needs of current and future audiences.

There are many examples of extraordinary leadership and innovation among America's orchestras. *Fearless Journeys* tells the stories of five of these orchestras and their quest for renewal through innovation. Their annual budgets range from \$5 million to \$95 million. Their characteristics, operating models, geographical settings, and cultural environments are as varied as their challenges. But one thing is constant among them: the fundamental belief that business as usual will not take them where they want to go.

Pacific Symphony operates in a fast-growing decentralized metropolitan area not far from Los Angeles, where Western classical music traditions are increasingly unfamiliar. In response, the orchestra developed new approaches to contextualizing music, making deep cultural connections with its community. Faced with financial challenges and widespread disaffection among its constituents, the **Atlanta Symphony Orchestra** focused on a cross-constituent approach to building a collaborative organizational culture that eliminates silos and increases synergy. The opening of Walt Disney Concert Hall provided leverage for the **Los Angeles Philharmonic** to open its "high art" doors to a wider public, focusing on the powerful role of contemporary music and creative

Innovation in today's orchestras is characterized by aggressive questioning of long-held orthodoxies and traditions

interdisciplinary projects. Looking to link its identity to clear chamber-orchestra values and to build its reputation as an ensemble of chamber musicians, **The Saint Paul Chamber Orchestra** changed its artistic leadership model, vesting decision-making power in musicians and replacing the music director with a rotating team of artistic partners. When the **Memphis Symphony Orchestra** lost its audience and revenue base, it came face to face with its growing irrelevance in a community that did not care whether the orchestra lived or died. Embracing a new mission of public citizenship, the orchestra began building artistically engaging community partnerships, using musicians' artistic talents and leadership to serve community needs.

The experiences of these five orchestras demonstrate that an activity is truly innovative if it is:

→ **Meaningful.** Does it have a purpose and objective? Does it illuminate an issue or suggest a novel approach? Does it address one of the key areas that affect the orchestra's well-being, i.e. artistic product, community engagement, organizational capacity, etc.? Does it change fundamental assumptions and practice? Does it generate positive response from the audience? Does it generate enthusiasm among organizational constituents? Does it generate interest in the field?

→ **Effective.** Does it solve the problem or answer the need it was designed to address? Does it stimulate

creativity and increase capacity within the organization? Does it help attract top talent and facilitate access to resources (time, money, staff)? Does it focus on new prospects/patrons who are not already committed to the art form? Does it keep traditional subscribers and patrons loyal and engaged? Does it produce revenue? Does it enhance audience demographics?

→ **Sustainable.** Can the method or activity be replicated? Is it adaptable? Does it perpetuate a culture open to novel solutions and approaches? Does it build the infrastructure required to support innovative activity and process, including broad ownership among constituents? Does it provide a framework for evaluating impact and making decisions? Does it capture lessons learned and turn them into institutional knowledge that enhances skills and capabilities? Does it enable a cycle of continuing investment in innovative activity? Does it generate ongoing support from the organization's leadership and board?

What do innovative orchestras have in common?

The immediate impetus for change in all five orchestras studied was some form of crisis. Financial difficulties, leadership transitions, a poorly defined artistic identity, declining audiences, community apathy, and prolonged labor disputes are examples of conditions that inspired innovation in these orchestras. The changes developed organically, as a result of specific events, with all participants thinking through next steps and capturing the lessons learned along the way. Yet these innovations created far greater

One thing is constant among them: the fundamental belief that business as usual will not take them where they want to go

strategic and transformational impact than typical incremental efforts. They were successful because they occurred at the right time in the life of the orchestra, because they emerged naturally from the context in which the orchestra was operating, and because they reflected consensus within the organization rather than being imposed arbitrarily. Solutions were individualized, and they made sense for the orchestra in its time and place.

In all the orchestras studied, innovation consistently was

- Inspired and led by a **committed and courageous team of leaders.**
- Driven by an **expansive vision** that was well articulated and communicated internally and externally.

The key was that artistic issues were fueling the discussions, and they were being examined in new and interesting ways

→ Fueled by an **open artistic model**.

In some cases, the open artistic model took form as a new way of making artistic decisions. In others it was a redefinition of what should be included in the orchestra's standard programming. In still others it emerged as a new understanding of how artistic talents could be deployed differently. In every case, however, the key was that artistic issues were fueling the discussions, and they were being examined in new and interesting ways.

- Coordinated by someone filling an explicitly identified **integrator role**. Having someone clearly responsible for keeping parallel activities on track and for managing the complex relationship dynamics of the work was critical to ensuring communication and maintaining momentum.
- Based on a strong foundation of **artistic excellence**. Technical performance and the quality of concerts are generally high throughout the industry, and the fear of compromising quality by changing conventional practices is deeply ingrained. But these five orchestras forged new ground. Liberated by the security of their artistic strength rather than constrained by the fear of losing it, these pioneers showed that innovation is indeed the friend of artistic excellence.

The stories of these five orchestras are meant to illuminate possibilities, inspire curiosity, raise questions, and provoke discussion both among orchestras and between orchestras, their communities, and stakeholders. Together they form an exciting new paradigm for American orchestras' journey toward a more vital and vibrant future.

Catherine Maciariello

Editor



The Colorado-based Bowed Piano Ensemble performs with Pacific Symphony in Orange County, California in 2008

case studies



for the people: democratizing artistic vision

Los Angeles Philharmonic

BEGINNINGS

A Context for Innovation

In America, the idea of going west triggers images of discovery, bold experimentation, risk-taking, and realizing one's dreams. It is America's defining metaphor. Going west has always promised economic gain and individual and artistic freedom—pioneers looking for elbow room, Gold Rush adventurers hoping to strike it rich, entrepreneurial computer geeks on the trail of technological innovation and early retirement, surfers chasing the Big Wave, and starry-eyed artists dreaming of making it big in Hollywood.

Go all the way west and you find Los Angeles, the country's second-largest city—a big, sprawling metropolis of nearly four million people offering year-round good weather, infuriating traffic, and the thrill of living in the Pacific Ring of Fire. Los Angeles is a young and diverse city. Over 70 percent of Angelenos are under 45. Latinos and Hispanics constitute almost 50 percent of the city's population, and non-Hispanic whites are increasingly in the minority, today representing less than 30 percent of the city's demographic profile. Los Angeles is also the world's entertainment capital, an historic center devoted to television, motion pictures, interactive games, and recorded music. The city is a permanent magnet for talented international artists and a birthplace



Gustavo Dudamel conducts
Youth Orchestra Los Angeles

for high artistic energy and innovation across all art forms.

The Los Angeles Philharmonic has its roots in this history of money and dream-making. The orchestra was founded in 1919 by philanthropist and amateur violinist William Andrews Clark, Jr., the son of one of the three Copper Kings of Montana. In the 1930s LA became home for European émigrés who escaped the war in search of professional opportunities in the city's lucrative movie studios, including the legendary conductor Otto Klemperer, whose artistic leadership brought distinction to the orchestra.

Ernest Fleischmann became general manager of the Philharmonic in 1969, and he served in this post until 1998, working closely in his early years with conductors Zubin Mehta, Carlo Maria Giulini, and André Previn to elevate the orchestra's quality and reputation. Fleischmann was a quintessential top-down leader, tough-minded and sometimes hot-tempered. Legendary in the field, he is respected for his single-minded devotion to orchestras, for his uncanny ability to identify artistic and administrative talent, and for his fundamental impulse to question convention. At the same time, he made it clear who was in charge, and his style did not always leave space for others to influence decision-making, leading to charges of elitism and exclusion from some board members and community leaders.

While Fleischmann's leadership brought recognition to the orchestra for its artistic programming and performance, it did not always produce financial stability. As the glory days of the early 1980s turned into worrisome deficits, a meager endowment, inadequate acoustics in the Dorothy Chandler Pavilion, and short-term artistic leadership, Fleischmann knew the orchestra needed two things: a new concert hall that would be built not as a temple of culture but as a welcoming home for all the city's residents, and a virtuoso conductor with energy, imagination, and powerful charisma. When he enticed the young Finn Esa-Pekka Salonen to join the orchestra as music director in 1992, he got the big thinker he needed. When Lillian Disney gave \$50 million to construct a new hall in honor of her late husband, Walt, LA got what the facility designer Frank Gehry called the "living room for the people." Fleischmann was not to see the project through, however, and when he retired, it was embroiled in controversy as public officials, corporate sponsors, patrons, and board members could not agree on a multitude of design, cost, and other issues.

Deborah Borda became president and CEO of the Philharmonic in 2000, and it would be Borda who reinvigorated the project and opened the doors of Walt Disney Concert Hall, an architectural and acoustical marvel whose dramatic profile mirrors the innovation that flourishes within. Borda's imaginative ideas for using the Concert Hall, as well as her powerful collaboration with Salonen, have made the Philharmonic one of the most visionary, contemporary-minded, future-oriented, and innovative orchestras in the country.

Under Borda's leadership, the Philharmonic now thrives with a \$95-million budget and a concert attendance rate of over 90 percent. It offers a 30-week subscription season and a 14-week summer series at the Hollywood Bowl. Borda is credited with changing the business model of the orchestra and with creating a work environment in which people are empowered to create solutions. "The difference between Deborah and [Ernest]," says one long-time employee, "is that you brought problems to Ernest and he solved them. You don't bring Deborah problems, you

**When Lillian Disney
gave \$50 million to
construct a new hall
in honor of her late
husband, Walt, LA
got what the facility
designer Frank Gehry
called the "living room
for the people"**

bring the solutions. That's the opening point for the real conversation about what should be done."

Today the Philharmonic is comfortably at home in its environment. It behaves a lot like its city. "LA is a fairly experimental and loose place in a certain way," says a composer who has worked with the orchestra. "People are willing to experiment with the way they live their lives [and] I think we have been able to use that to our advantage."

THE PATH TO INNOVATION

Becoming the People's Orchestra

A History of Rocking the Boat

A history of taking big risks on talented young music directors keeps the Philharmonic as experimental and loose as its city. Zubin Mehta was 26 when he became music director in 1964, serving the orchestra for 18 years before leaving for the New York Philharmonic. When Salonen joined the orchestra in 1992, he was just 34. He stayed for 17 years, feeding the community's taste for the bold and new, and re-imagining the orchestra's artistic mission. Salonen made significant contributions to American contemporary music during his tenure by commissioning works, integrating

composers into the life of the orchestra, and stretching the traditional boundaries of orchestral programming practice through multi-faceted thematic programs and inter-disciplinary art projects. The tradition continued in 2009 when 28-year-old Venezuelan visionary Gustavo Dudamel became the Philharmonic's new music director.

Forward-thinking executive leadership—characterized by revolutionary ideas and a commitment to new music—also has helped provide a foundation for experimentation and innovation at the Philharmonic. Ernest Fleischmann believed that modern orchestras should do more than preserve traditional repertoire. During his tenure, the Philharmonic created the Los Angeles Philharmonic Chamber Music Society and the Los Angeles Philharmonic New Music Group, whose Green Umbrella concerts became a model for the industry. Fleischmann is widely known for advocating a more open artistic structure that would give orchestras flexibility and would enhance their versatility and creativity. In an address he delivered at the Cleveland Institute of Music, entitled "The Orchestra is Dead—Long Live the Community of Musicians," Fleischmann proposed a loose structure of as many as 150 musicians who could be configured in different ways to serve a wide range of musical purposes.

Upon her arrival, Deborah Borda insisted that Frank Gehry provide space for an office building next to the new concert hall and not miles away as previously planned, enabling all the orchestra constituents to share

not only a vision, but also working conditions that bound them together. In preparation for the opening of the hall, she formed a cross-departmental Inaugural Planning Committee and charged it with planning, coordinating, and implementing all activities related to the building and occupancy of the Concert Hall, as well as with maximizing long-term collaborative opportunities internally and externally. Says one staff member, "We had such a good experience with the IPC that it paved the way for doing this as a regular part of our processes. When people ask us how things get done at the Philharmonic, we continually go back to this model, a group of people coming together and solving a problem."

The Best is Now

Building a reputation for creating and presenting new music—as well as for engaging audiences around it—requires a fundamental shift in perspective for any orchestra. Going yet one step further and actively exploring cross-disciplinary links and intersections that lead to robust and provocative new forms and presentation formats is completely new territory. First, the organization must believe passionately and sincerely that classical music is an evolving art form, not a library of historic masterpieces. It must believe that the fields of dance, theater, electronic media, and other disciplines can inform and expand musical programming and performance. It must believe that there are new discoveries to be made and that the orchestra must be proactive in stretching and redefining its core artistic material.

At the Philharmonic, the familiar repertoire of the 18th and 19th centuries is important, but it is not more important than the music of the 20th and 21st centuries. Living composers (emerging and established) receive the same respect and attention given their dead predecessors. So do important artists working in other disciplines. Non-traditional programming—imagined and executed in collaboration with leading theater, dance, and media artists—is the basis of the orchestra's "identity programming." New music is integrated throughout the orchestra's season, not offered discretely for a few aficionados. Big commissions receive top billing and key placement on the concert program. As one staff member says, "We would commission a 40-minute John Adams piece and would put it on the second half of the program. It was not the kind of formula where you say you're going to give people their medicine and then let them get to the rest of it. It was clear in the programming how significant the piece was."

Salonen is not only a gifted conductor but also a gifted composer. He brings a creator's sensibility and sensitivity to programming, and he sees everything through a contemporary lens. During his tenure, he led the way in establishing the Philharmonic's fundamental artistic orientation and principles, which included treating the entire program with an equal sense of adventure and sensitivity. "My view," he says, "is that the most appropriate way to judge an orchestra is not only how well it plays Brahms, Beethoven, or Mahler, but also how it plays John

Adams, Steven Stucky, Magnus Lindberg, and Pierre Boulez. If one were to identify the median year of all the works we now play per season, it would fall in the 20th rather than in the 19th century. Though we are still a century behind being 'current,' our shift forward chronologically has been regarded as a radical step." In Salonen's view, there is nothing radical about it. Rather, it is the right approach for a modern orchestra living in real

time. "Our starting point," he says, "was not that the best has happened already and the best happened quite a long time ago. If the best happened when Brahms was alive, for example, then what's the point? Our starting point was completely different. We decided that the best was yet to come. What shall we do to make sure that the best will arrive right here and right now?"

Building the People's House

A sense of place is critical to the Philharmonic, just as it is to every orchestra. Obviously, not all orchestras get to live, dream, and perform

Los Angeles Philharmonic presents *Tristan & Isolde* at Walt Disney Concert Hall.
Conducted by Esa-Pekka Salonen with guest soloist Christine Brewer.



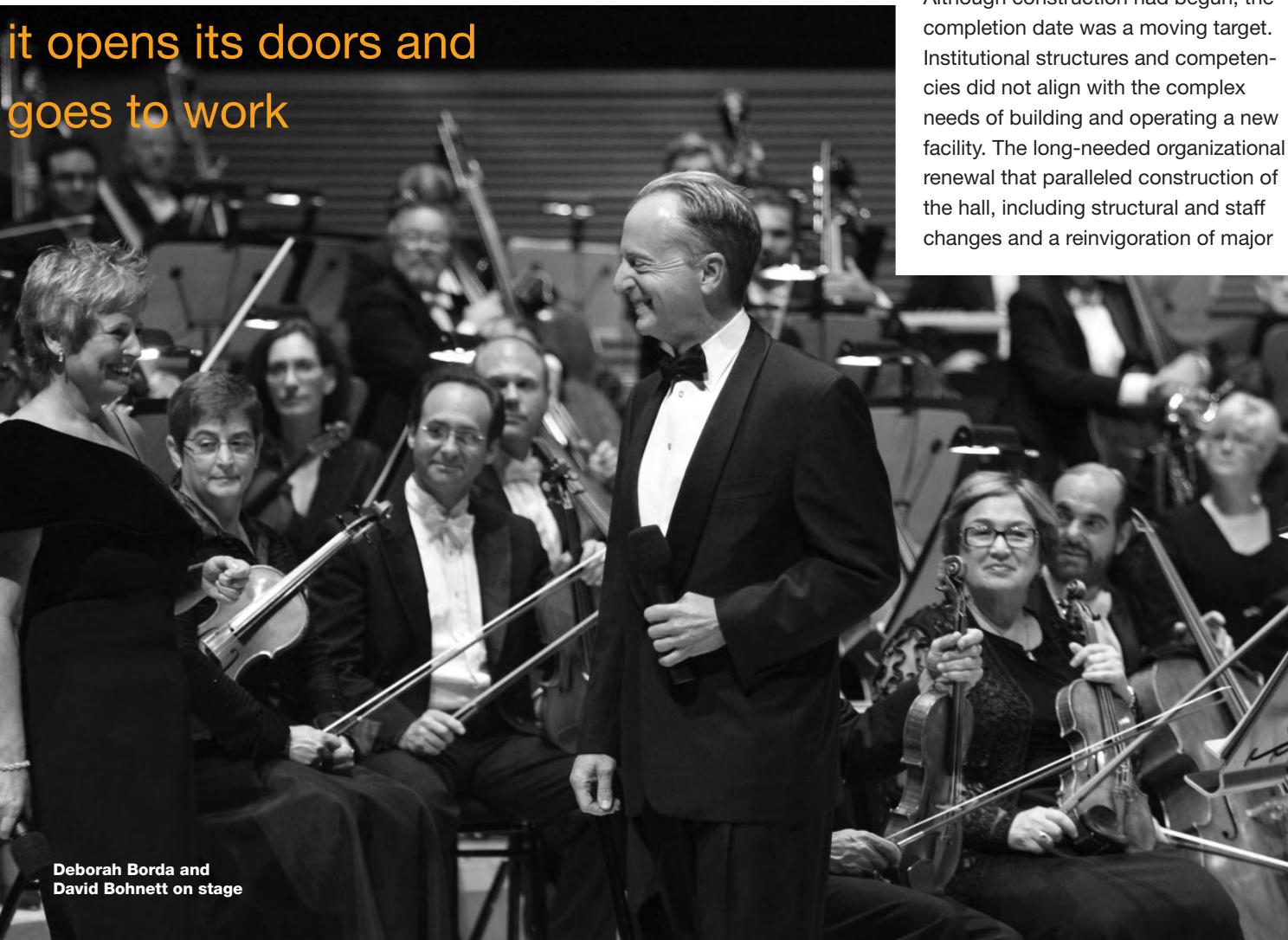
If a picture is worth a thousand words, the Philharmonic makes a statement to its community every time it opens its doors and goes to work

in an iconic building that symbolizes its city's reach and vision, reflects its own commitment to innovation, and draws national and international attention to the work the orchestra does. If a picture is worth a thousand words, the Philharmonic makes a statement to its community every time it opens its doors and goes to work.

From its inception, Walt Disney Concert Hall was imagined as a gathering place for the people of Los Angeles to share musical and cultural experiences. The innovators and artists associated with the Concert Hall were all non-traditional thinkers whose values are indelibly imprinted in the building's design and use: Walt Disney's creative genius and his affinity for the music of his time; Ernest Fleischmann and his revolutionary abandonment of the traditional orchestra's role; Frank Gehry's novel and breathtakingly unusual forms;

Deborah Borda and her desire to create an entirely new artistic and business model for the orchestra; Esa-Pekka Salonen, whose departure from standard programming made the Philharmonic arguably the "most intellectually lively orchestra in America" (*The New Yorker*); and the people of Los Angeles, whose diversity and rich cultural traditions bring life and variety to the building. The cumulative energy of these thinkers produced classical music's Hall for All.

The path to construction of the Concert Hall was not an easy one. In the 1990s hope turned to despair as financial problems, lack of leadership, political divisions, and controversy threatened to dismantle the project. Although construction had begun, the completion date was a moving target. Institutional structures and competencies did not align with the complex needs of building and operating a new facility. The long-needed organizational renewal that paralleled construction of the hall, including structural and staff changes and a reinvigoration of major



Deborah Borda and David Bohnett on stage

management functions, was in itself a major undertaking.

Borda understood, however, what the new hall meant for the orchestra, for artists, for music, for the city, and for the people of Los Angeles. Opening the hall became a major part of her leadership vision. The hall's purpose fit well with her goal of making the orchestra and its music widely accessible. The Concert Hall was expected to resuscitate a languishing institution and launch the orchestra into a new era of success and innovation. It was also the fulfillment of a dream for Borda, for whom moving west was an exciting and hope-filled prospect.

Once a long-awaited agreement between all constituents was finally reached, Borda put on her hard hat and guided every aspect of the hall's construction. Walt Disney Concert Hall opened in 2003. Architecturally striking, with excellent acoustics, it immediately became an icon and an immense source of pride for Los Angeles. In this uniquely welcoming concert hall, 2,265 people surround the orchestra in a family-like intimacy. The Concert Hall is comfortable, warm, and inviting. Frank Gehry calls it a "sanctuary" where people can share experiences together. Most important, it is truly democratic in design, with good sight lines and stunning acoustics throughout that provide an equally pleasurable musical experience for everyone in the audience—regardless of how much they paid for their tickets. It makes everyone part of the artistic equation. The building's seamless connection with surrounding gardens eliminates barriers between the orchestra and its community, and

numerous open spaces within the building offer opportunities for small concerts, lectures and discussions, and informal mingling.

The impact of the Concert Hall was overwhelming and immediate, yet it provided a provocative new challenge for the orchestra. Now the team had to breathe life into the building. It needed to make good on its vision of bringing music to the people in exciting and unexpected ways, shunning the field's legacy of orchestras as status-driven elitist organizations and becoming an orchestra of the people and for the people. Could the Philharmonic establish itself not simply as a musical leader but also as a thought leader, a cultural institution whose value and reach extended beyond music? Could it use the Concert Hall to derive energy from artists and from the public? Most important, would the orchestra live up to the expectations so shiningly reflected in the hall's design or would the boldness of the architecture overpower the orchestra's institutional purpose and creativity?

INNOVATION IN ACTION

Opening Doors to Musical Experience

Credit for the artistic transformation of the past two decades and for the abiding devotion of the Philharmonic to making programs and projects that resonate for audiences belongs to the partnership between Salonen and Borda, who both worked tirelessly to support their vision and to build the

consensus and institutional structures necessary to implement it. Successful innovation, says Salonen, rests on several core beliefs: People are innately curious, open-minded, and willing to experience new things if they can connect these experiences to their contemporary lives. If conventional prejudices, arcane rules, old-fashioned axioms, and social stigmas can be carefully peeled away, people are free to judge things on their own terms. It is not the job of the audience to do this for themselves, but rather the responsibility of the orchestra to create conditions that eliminate barriers and make the audience part of the artistic process. It's about creating reciprocity. As Salonen says, a new work is "a piece of music written by a human being for other human beings—now I am part of this chain, and it's a very satisfying feeling."

Salonen also believes that there is a growing alienation in today's society that is dangerous for the human psyche. This belief was the driving force behind his strategies for increasing accessibility at the Philharmonic. He believes that human beings have a biological need for rituals, and he worked consciously to create them. "When the orchestra plays, people are prompted to witness collectively a powerful sensory, emotional, and intellectual experience. As society becomes more fragmented in terms of geography and technology, these types of shared rituals allow us to preserve an element of cohesion in our culture," he says.

“People from other cities and other countries are astonished when they come here to see concerts of new music with 2,000 people in their seats”

Preserving cohesion in the culture was the core element of the Philharmonic’s programs under Salonen. He inspired numerous interdisciplinary projects that stretched the art form. He brought jazz and world music into the Concert Hall. He integrated contemporary music into the season with vigor and passion. He brought a creator’s perspective to all his work, whether in commissioning and performing new works, developing a novel approach to a familiar masterpiece, or designing festival programming. Artists should be leading tastes, he says, not following them. “Why should we accept that the broader public won’t care about a Stravinsky program?” he asks. “We shouldn’t accept that. We should actually find a way for the public to care.” Clearly, Salonen helped the public care—slowly over time, one piece at a time, with plenty of commentary and support to deepen knowledge and comfort among audiences. One composer says, “People from other cities and other countries are astonished when they come here to see concerts of new music with 2,000 people in their seats. That took a long time to build up, but it is now a very solid part of our identity.”

Patience, dedication, unflinching values and beliefs, an insistence on leading taste—all are part of the Philharmonic’s programming philosophy and approach. Programming is predominantly idea-driven and designed to reflect the Philharmonic’s brand and purpose. The orchestra calls it “purposed programming.” A programming team of the music director, the president, and the vice president of artistic planning plans the winter classical concerts. This team works with in-house experts in other programming areas, including jazz and pop, to develop multi-disciplinary projects and program the festival periods. The goal is to construct a season that ensures the right mix of “identity programs”—those eclectic, unexpected programs that define the orchestra’s identity as an innovator—and traditional bread-and-butter programs. The orchestra’s strong commitment to identity programming is evident in resource allocation decisions. It simply does not cut its “identity” programs. “If we make cuts, we make them other places. If we were to kill an identity program, it affects who we are,” says a staff member.

The programming team considers a range of audiences and takes into account a multitude of artistic experiences. The team describes its process as programming both horizontally and vertically. In other words, it programs horizontally for the subscriber who

makes multiple visits, is committed to the institution, and wants to see a broad range of orchestral repertoire. Designing vertical elements of the program focuses on developing cross-genre and cross-profit-line activities. These elements intersect with the horizontal program, and integrating them is like production and marketing traffic control. During festival periods, the organization might be producing as many as 26 events during a two-and-a-half-week period, including full orchestra and Green Umbrella concerts, recitals, visiting orchestras, pop music, jazz, theater, and dance—all while engaging with multiple partners around the city. During these times, the orchestra bombards the city with musical and cultural ideas.

The Philharmonic’s concept-driven artistic festivals are designed to be intense experiences, capturing multiple visions of similar content in a compressed amount of time. They are complex in design and curated by prestigious artists. Festivals include orchestra concerts, jazz, world music, and electronic music performances, targeting a wide range of audiences and providing multiple points of entry. Visual and theatrical components frequently enrich the artistic experience. Festivals are not simple thematic events at the Philharmonic—they are conceptual projects. This is an important distinction and a critical programming imperative. Standards

Summer Sounds Music & Art for Kids at the Hollywood Bowl with the Shakti Ensemble, Summer 2009



for content and learning potential are high and clearly articulated. Curators are charged both with creating a meaningful and powerful experience for audiences, while at the same time contributing to the Philharmonic's brand. The job, says one staff member, "is to create a season that is unique to the LA Phil. There are programs and projects in our season that are not happening anywhere else. If you want to see this project, you have to come to LA. We're not interested in taking something else and re-purposing it for us. We want to create new produced events."

The Philharmonic has presented numerous festival projects. *Minimalist Jukebox* (curated by John Adams) ranged from classic minimalist works by Steve Reich, Terry Riley, and Philip Glass to post-minimalist works, including Glen Branca's symphony for 100

electric guitars. Subscribers and new young audiences came in full force to the opening all-night show, which began at midnight, as well as to other festival events. *Concrete Frequency* (curated by David Robertson) created sonic snapshots of urban life, including Varese's *Ameriques* and Ives' *Central Park in the Dark*. The festival included films, hip-hop artists, and graffiti art exhibits. *The Shadow of Stalin* explored the effects of a political system on creativity and aesthetic choices.

In *The Tristan Project*, Salonen teamed with Peter Sellars and media artist Bill Viola to design a multi-disciplinary art project based on Wagner's opera *Tristan und Isolde*. The festival *West Coast Left Coast* (curated by John Adams) celebrated California's distinct musical culture. Dudamel led a concert that included Salonen's *LA Variations*, Lou Harrison's *Piano Concerto*, and Adams' *City Noir*. Adams conducted a performance of his own *The Dharma at Big Sur*. The Kronos Quartet served as resident artists at the festival, and

Adams led the orchestra in the world premiere of a new work by Thomas Newman, featuring the ensemble. Recently completed is *America and Americans*, which was curated by Dudamel and focused on the shared cultural traditions of the Americas.

The Philharmonic abides by its core values of excellence and innovation. The most fundamental characteristic of the orchestra's innovative approach is its exploration of ways to "grow the art," extending it into proximate spaces and across artistic disciplines, setting high artistic standards and attracting new audiences from the worlds of dance, theater, visual arts, literature, and media who are interested in witnessing the confluence of unique artistic perspectives. These journeys into uncharted artistic frontiers not only bring new audiences to the Philharmonic, they also help the orchestra reach a larger pool of patrons and donors. At the same time, the orchestra never loses sight of its

"There are programs and projects in our season that are not happening anywhere else. If you want to see this project, you have to come to LA"

role in the community, defining its relevance as serving the broadest possible population within its geographic area. One civic leader says that the Concert Hall “is a visible landmark in Los Angeles. It’s a source of cultural pride. But I don’t think the Concert Hall would have happened in the way it did if [community] values weren’t operating at the center of the organization.” How does this relationship between core values and community relevance play out, and how has the Philharmonic used its advantages to deepen access for audiences in the Concert Hall and throughout the community?

People gain access by being invited to the table. The Philharmonic makes a conscious effort to be universally present, participating in important community activities and listening to what is going on—artistically and otherwise. It regularly convenes constituents to help the organization examine and understand how it is perceived. Treating diverse community representatives as full stakeholders in the orchestra’s visioning and evaluation help build loyalty and ownership. The orchestra also has redefined its educational programs as community-building projects, and it provides

access through inexpensive tickets and multiple performance locations.

The selection of Dudamel as music director reinforces the orchestra’s commitment to Los Angeles—not just artistically but culturally as well. Dudamel’s own heritage makes immediate connections in a city that is nearly 50 percent Hispanic. A populist by nature, and a childhood member of the unprecedented training program El Sistema (through which 250,000 young Venezuelans from poor backgrounds play musical instruments), he was a driving force behind the Philharmonic’s decision to form the Youth Orchestra of Los Angeles (YOLA). Borda says that Dudamel “sees the orchestra as a metaphor for community, for civilization. He has a very deep sense of social process and the importance of art and community.” The orchestra has high hopes that Dudamel will open

new doors in the community, making the Philharmonic more deeply rooted in its local culture, helping the orchestra learn how better to make cultural connections, and giving every child who wants one a musical instrument and a place in a youth orchestra somewhere in the city. Los Angeles is eager for this new relationship. In describing the intrinsic cultural impact and value of engaging young people in musical performance, a retired police officer says, “I’m pleased to learn of what you are doing. I’ve never arrested a youth who was playing a musical instrument, so I think there’s a social benefit there.”

Already YOLA—which is managed through a unique partnership among the orchestra, the Harmony Project, and the Department of Parks and Recreation—has enrolled over 200 students, most of whom are Latino or African American. Students receive free instruments, lessons, and rehearsal space. In return they must commit to show up and to practice. The EXPO Center Youth Orchestra, the first YOLA project, began in 2007. “It’s hard work and commitment,” says one civic leader. “It can’t be something that’s just a couple of ribbon cuttings and then forget it. The commitment can’t run only at the board level, but it depends on musicians. You have to have buy-in from the musicians. They have to care about it.” With Dudamel at the helm, caring should come easily, and together he and his musicians may be destined to make permanent changes in the social and cultural environment of Los Angeles.

Gustavo Dudamel



internal enablers have contributed to its success in transforming itself into a vibrant arts and business organization:

DEVELOPING READINESS

Key Enablers of Program Innovation

Fortunately for the Philharmonic, innovation and risk-taking do not go against the grain in Los Angeles. While the complicated ethnic tapestry of the city might be considered challenging for some arts organizations, for the Philharmonic it presents a rich palette from which to design far-reaching and innovative programs. Diversity and a history of risk-taking are among the fundamental environmental conditions that provide context for the orchestra's work. The city is also home to artists working in all media and genres. For an orchestra interested in breaking programmatic boundaries, the city offers an unlimited supply of creative partners, performers, thinkers, and soul mates. It's easy to think about new forms, non-traditional collaborations, and unusual presentations. It doesn't hurt that Los Angeles is also home to Hollywood with all its glam and glitter, its narcissism, and its lessons on branding. In Los Angeles it's okay to make bold statements, to embrace ambitious plans, to dream of block-busters. It's okay to wonder at all the marvelous possibilities. Most of all, it is just fine to be a character.

Against this backdrop of unique conditions, the Los Angeles Philharmonic puts its vision in play. A number of

Fearless Leaders

Clear vision, decisive action and commitment to artistic mission are the hallmarks of Deborah Borda's leadership. She is a formidable executive with vision, courage, and exemplary credentials. She is known as an innovator and as a restructurer of institutions. She is a musician with a musician's soul. A consultant who has worked with her often says, "She has the head of a top-notch CEO. Any corporation in this country could use Deborah Borda's head. You put [that] together with the energy to build and stick to a plan, and you get real change." She has built the board into a forward-looking and committed governing body with a passion for music and for innovation. The board believes that innovative projects are an essential part of the orchestra's identity, and they commit resources to enable the work.

Borda asks questions: How can we do things better? How can we relate to our community in a much more interesting way? How can we encourage a dialogue among musicians and non-musicians in ways that are informative and inspiring? How do we create a culture that prides itself on innovation and success? She empowers her staff to make decisions, and she holds them accountable. She takes time to explain the creative planning process to the board, building ownership and commitment. She focuses her attention outward, monitoring and learning from the business environment inside and outside the orchestra industry. She is insistent on measuring success in ways that help the orchestra learn. She is maniacal about managing current performance and efficiency, but she and her team also are intensely focused on the future, relentlessly

The orchestra also has redefined its educational programs as community-building projects, and it provides access through inexpensive tickets and multiple performance locations

imagining the orchestra as it could be and putting the financial plans in place to ensure continued innovation and leadership.

Esa-Pekka Salonen's strong convictions, openness to novelty, and willingness to take artistic risks have earned him a place in history. Known sometimes for being headstrong, he was still able to embrace good ideas from others whose aesthetics are not completely aligned with his. In many ways, Salonen is an enigma. Called a "force" by many, he also has an intense quiet energy that translates to the public, and he became a beloved figure in Los Angeles. Says a long-time collaborator, Salonen is like "a beautifully oiled train that just keeps moving at an elegant pace but keeps pushing aside anything that gets in its

way.” A strong but reticent intellectual presence, Salonen demanded not just technical excellence, but technical perfection.

Equally fearless, Gustavo Dudamel has just begun his leadership journey at the Philharmonic, and he couldn’t offer a greater contrast. Following a remarkably successful music director who leaves an unmistakable legacy, he brings different strengths and different expectations, in particular the opportunity for more meaningful community partnerships. There is nothing quiet about Dudamel. He is called “electrifying” and has a “warmth and humanity that is palpable.” A Philharmonic staff member says, “When you go to a concert with Gustavo there is a heightened sense of aliveness. You feel it. It’s very much a community experience when he is conducting, and everyone feeds off his energy.” Like Salonen, he is an innovator with deep artistic instincts and convictions. His emerging leadership is not a replacement for what has gone before, but a deepening and strengthening of it—just one more step in the Philharmonic’s continuing artistic journey.

Artistic Integrity

A Los Angeles civic leader says of the orchestra, “What drives the orchestra’s existence, what drives success, is always going to be defined at the highest level. It’s artistic excellence. Lose that, you lose everything.” At the Philharmonic the institutional tone and values are set in what happens at the heart of the organization—creating and advancing the art form. Integrity

is critical. That means the organization devotes time and resources to ensuring that its artistic programs are in line with its mission. It is complicated and challenging given the orchestra’s commitment to accessibility. Managing the inherent tensions—real or imagined—between an ambitious artistic agenda and deep community engagement requires solid artistic alignment between the president and music director, substantial knowledge of artistic issues by the staff and board, and cooperation among musicians. One musician says, “We have to be very open-minded to play all different types of music. We also have to be technically superior because we do a lot of new music and we do it quickly. That is what Esa-Pekka has trained the orchestra to do. He is a flawless conductor in terms of never making mistakes, and he demanded that of us.”

Facilities and Branding

Few orchestras have venues like Walt Disney Concert Hall and the Hollywood Bowl. Together, the venues are big friends of innovation. The Concert Hall is famous world-wide. The Hollywood Bowl has been the hallmark of summer life in Los Angeles for decades. The 18,000-seat venue flourishes during the summer with sounds of rock and roll, blues and jazz, in addition to frequent performances by the orchestra. The Philharmonic has successfully made its venues part of its identity.

Expertise and Knowledge

Knowledge capacity is a prerequisite for innovation. The Philharmonic recognizes and values strong talent across all levels and all departments. In hiring new employees, the orchestra looks not only at professional credentials, but also considers how well an individual would fit with organizational standards and culture. It places high value on creativity, innovative thinking, and the ability to collaborate, often seeking creative talent outside the industry in order to leverage a wide range of knowledge and experiences. The orchestra also engages scholarly or creative experts from outside the organization, such as its festival curators, to enhance the impact of its programming.

Efficient Systems and Processes

The Philharmonic produces 250 concerts annually, and life there is fast-paced and pressure-filled. Starting with the organization’s business model, leaders have structured internal systems and processes to maximize performance and provide a strong business foundation for advancing its artistic agenda. The Hollywood Bowl’s operations and programming have been re-focused, making it a lucrative source of income to support innovative identity projects. Approximately 75 percent of the orchestra’s income comes from ticket sales and other earned income, much of it from summer performances.

Regular strategic planning, benchmarking, and a system of key business indicators help the organization evaluate performance, forecast alternative scenarios, and make informed

decisions about the future. Cross-departmental teams work regularly on large projects or issues. Team composition and leadership depend on the task at hand, but teams generally include senior and junior members of major departments. The process is organic, but also task- and time-driven, with emphasis on designing the best possible outcomes or solutions. Leaders say that some of the orchestra's most compelling festival ideas have come from cross-departmental conversations.

Alignment within the Philharmonic grows out of a set of value-based core principles, and people can readily articulate the organization's core values. Staff understand the power and meaning of efficient communications to advance the orchestra's innovative brand. Internally and externally, messaging is clear and consistent—from subscription and festival concerts to family and educational programs. Communications are always aligned with the orchestra identity, core values, and objectives.

Supportive Culture

The Philharmonic's culture has been built over time to reflect the orchestra's values and to enable artistic innovation. Excellence and risk-taking are at the center of the organization's culture. The highest possible quality is considered the norm—from artistic work to community engagement and internal projects. Employees are encouraged to present new ideas and experiment with novel approaches. Creativity is as much a management value as artistry. Rigor and discipline, as well as perfection and accuracy, are valued on stage and off. The environment requires persistence. Innovation is not always successful, and there are risks financially and emotionally.

Cross-departmental teamwork has strengthened the orchestra's ability to be open and transparent. Staff share information and knowledge readily, including financial information, and they typically make decisions after listening to a wide range of ideas. There is a conscious effort to explain and clarify information. Ongoing learning from internal and external sources is built into the daily life of the organization.

The culture also reflects a high level of personal attention and concern for colleagues. Musicians, guest artists, and conductors talk about how well they are treated, and staff members support each other's work. "It is a huge gift to come to work every day and be engaged and excited about what you are doing," says one. Another adds, "People love what they are doing, and they want to do the best job possible. It is sort of a throwback to the old days when my dad grew up and the company really cared about its employees."

Cross-departmental teamwork has strengthened the orchestra's ability to be open and transparent

THREE STEPS FORWARD

Impact and Learning

The Philharmonic can prove its success. The number of subscribers has risen from 18,000 at the Dorothy Chandler Pavilion to 23,000 at Walt Disney Concert Hall. The orchestra regularly sells 90 percent of its tickets. It reaches 120,000 children through its education programs. Its reputation as a forward-thinking organization and a nurturer of talent enabled it to attract a music director whom Simon Rattle calls "the most astonishingly gifted conductor" he has ever seen. The orchestra is known across the country as a destination for unique and mind-bending programs and projects. It has done this, as one civic leader says, "by being innovative in a way that has built audience rather than scared it away. The critical innovation always has to be on the stage going into people's ears." That civic leaders are able to articulate the connection between creativity and artistic value is a testament to the orchestra's success in making its mission clear and its programs accessible.

The Philharmonic also cites significant impact on the art form as a result of its commitment to composers and its approach to keeping music alive by working across genres and disciplines. It has improved vigilance and efficiency of the staff and built performance capacity in the orchestra, which today has a reputation for its open-mindedness, versatility, and ability to move easily and gracefully between styles and periods. Musicians who feared losing public support as a result of the emphasis on contemporary programming now are proud of the orchestra's distinct identity as a leader and innovator in the field.

It has all had an impact in the community as well, and with Dudamel's arrival, a new chapter of innovative community engagement and accessibility is being written. Just before his departure, Salonen told the orchestra that when he was buying fish at the market, the vendor told him he had really liked a piece he heard on the Green Umbrella series. "Just imagine," says a musician. "To me that really sums up the success he had bringing music to LA... that you could go to the fish market and talk about a concert with a person selling fish."

The Philharmonic is deservedly proud of its accomplishments. Staff cite a number of useful lessons from their experience:

If an organization truly values innovation, then novel ideas are not confined only to the artistic work, but rather sprout throughout the organization

- The ultimate metric of innovation is the quality of artistic product. What happens on stage demonstrates the strength of the creative idea and its impact on the audience.
- Alignment and communication among artistic, board, and executive leadership is critical in any environment, but particularly in one that values taking risks.
- A board with a passion for music is a driving force for innovation.
- Compelling institutional values and a sound business model are the necessary underpinnings of successful innovation.
- Branding is important and must be coordinated across the organization.
- Constant planning and visioning, ongoing analysis of financial performance, and leadership succession planning keep the organization stable and healthy, enhancing the capacity to innovate.
- Collaborative processes enhance creative solutions.
- If an organization truly values innovation, then novel ideas are not confined only to the artistic work, but rather sprout throughout the organization. A flourishing culture of innovation enhances organizational effectiveness and enriches the work environment.
- There are new audiences who want to learn new things. Creating and leading taste is possible. Making music intellectually and emotionally accessible—in appropriate and reinforcing spaces—builds loyalty and participation.

THE CONTINUING JOURNEY

Future Plans and Aspirations

Risk is inherent to innovation. While the Philharmonic proactively manages the financial risk of its activities, the artistic and personal risks are harder to quantify. Carefully monitoring audience reaction helps the organization assess and adjust, but the Philharmonic is struggling with how to define its artistic risk tolerance in some quantifiable way. Measuring outcomes poses similar problems, and the orchestra is working to develop a robust set of metrics that will enable it to better evaluate the impact of its programs. It is also working on a framework for rewarding people across the organization for their contributions to the process and for their successes in developing and implementing new ideas. One big



challenge is building in time for reflection and visioning in an organization whose busy schedule focuses heavily on execution. Like other orchestras, the Philharmonic also struggles with the transactional nature of philanthropy and with the difficulty of developing cross-institutional partnerships.

These are means to an end, however, and the most intense talk at the Philharmonic is about art, innovation, the pride in the orchestra's achievements under Salonen, and the promise of continuing success under Dudamel. The board talks about its "responsibility with Dudamel to really broaden the exposure of the institution to a much greater community." Staff are already deeply engaged in detailed analysis

Compelling institutional values and a sound business model are the necessary underpinnings of successful innovation

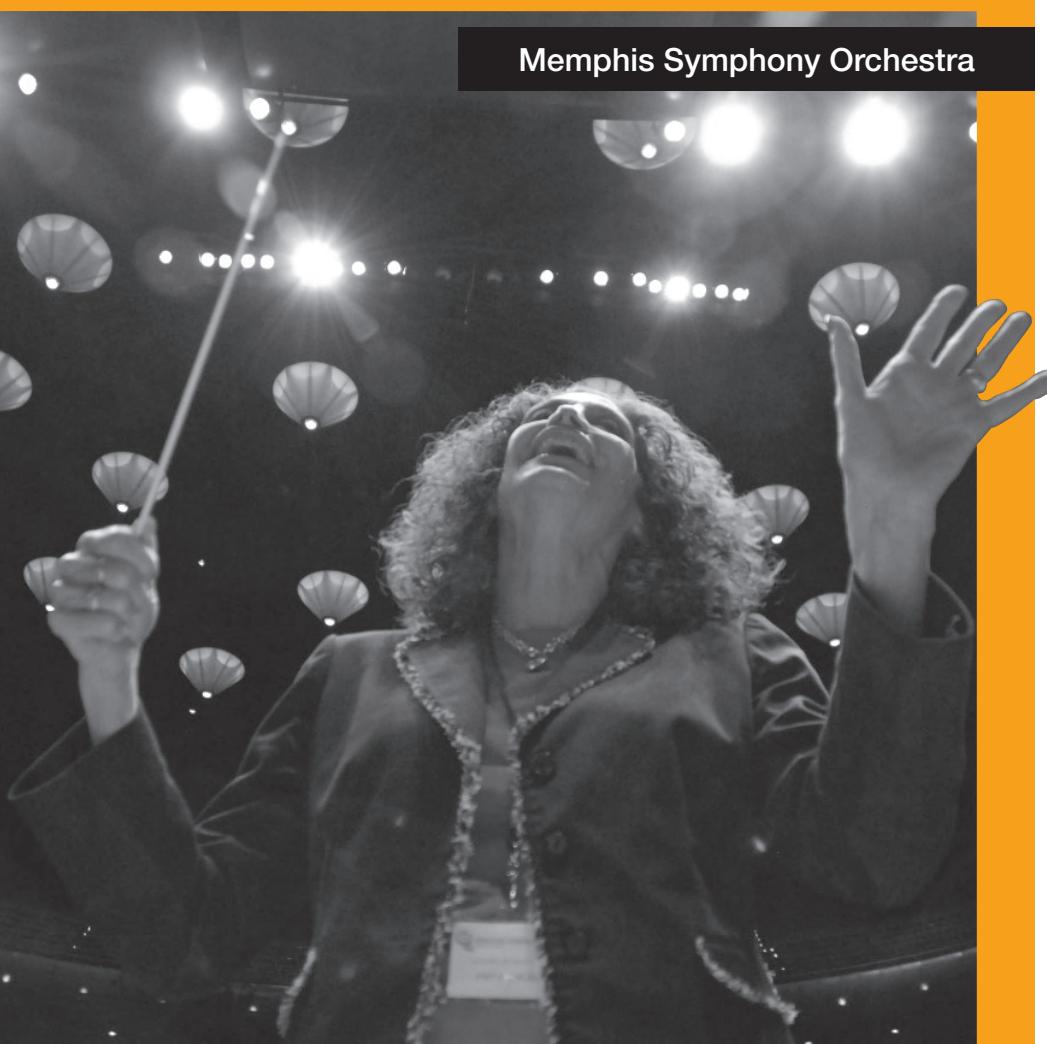
and networking to understand the benefits and challenges to the organization of deeper community engagement.

The Philharmonic's enviable privilege of celebrating the accomplishments of its departing music director while simultaneously welcoming its new artistic leader shows just how ingrained the spirit of innovation is within the organization. One legacy is indisputable. Another is forging its way into being. It all seems quite natural at the Philharmonic.

Los Angeles Philharmonic



service to citizenship: building artistically engaging community partnerships



BEGINNINGS

A Context for Innovation

Life in Memphis moves in rhythm with the river. Like its ancient namesake on Africa's Nile, Memphis is a strategic river city on the Mississippi—the largest city in the Mid-South and a historically lively hub for markets, exchanges, travel, and distribution. City founders saw Memphis as the gateway to the rich agri-business of the delta, and during the 19th century, Memphis became home to King Cotton and the prosperous slave trade. By the start of the Civil War, Memphis was split by its loyalties to the North and South. Grant's Union Army claimed Memphis as its headquarters in 1862, and emancipation quickly took root. Between 1860 and 1870, the city's African-American population quadrupled. With the field workers came the work songs of the fields, the gospel cries for mercy and justice, and the beginnings of America's own music—blues, jazz, rock-n-roll, and soul.

It has been said that Memphis has been mentioned in more song lyrics than any other place on Earth. It is the city that inspired and influenced such musical legends as Robert Johnson, Elvis Presley, Johnny Cash, BB King, Aretha Franklin, Otis Redding, Isaac Hayes, and Al Green. It is the home of Beale Street, Sun Studios, Stax Records, and Graceland. The music of Memphis is indeed a national legacy. Nevertheless, the city has long faced problems of poverty, segregation, and racial tension. The nation's exploding racial tensions led to the assassination

A Leading From Every Chair® participant takes the helm of the orchestra giving the downbeat of Beethoven's Seventh Symphony

of Martin Luther King there in 1968, and poverty remains a constant for much of the local population.

Against this cultural and artistic backdrop, the Memphis Symphony Orchestra (MSO) has been making music for more than 50 years. The orchestra was founded in 1952 as the Memphis Sinfonietta under the musical direction of Vincent de Frank. In 1960 the Sinfonietta officially became the MSO, and in 1963 a Ford Foundation grant enabled the orchestra to expand its season and triple its audience base. When de Frank retired in 1983, the orchestra created its first full-time core of 32 musicians. A year later Alan Balter became music director of the MSO, serving until 1998, when David Loebel assumed artistic leadership.

At the time of Loebel's arrival, the MSO was facing serious challenges: an inadequate concert hall and increasingly scarce operating revenue. In 1996, Memphis closed the MSO's concert hall and began construction of a new city-owned venue. The rebuilding phase was envisioned as a two-year project, and during that time the MSO was expected to perform in alternate, substandard facilities. Unfortunately, the project extended well beyond two years; it was actually seven years before the Cannon Center for the Performing Arts opened its doors. Those seven homeless years were dark and difficult for the MSO, and they produced serious and lasting consequences.

By the time the MSO moved into the Cannon Center in 2003, the audience base had been decimated and the organization's financial capacity was severely compromised. In 2004, after eight years of annual operating deficits, immediate attention was necessary to

assure the MSO's survival. Small audiences and poor earnings indicated a severe revenue generation problem. While the Cannon Center opening did create a flare of initial excitement, audience attrition during previous years had been heavy, and community perceptions and attitudes were forever changed. The MSO needed more than a new hall to connect with its changing audience—it needed to be "of" Memphis—a city where racial struggles and achievements are culturally embedded, and where class boundaries have reinforced a history of segregation and division. But Memphis no longer cared about its orchestra. It was an issue of relevance, and the MSO's response to that challenge changed the very core of the organization.

THE PATH TO INNOVATION

Music and Civic Activism

Benign Neglect

In 2002, as the Memphis Symphony Orchestra celebrated its 50th anniversary, organizational leaders began to assess the orchestra's future and its lasting relevance to greater Memphis. Clearly the orchestra was in serious trouble. For years the MSO had based its vision on the loyalty of a traditional audience: white, educated, professional, and well-off. As the city became more and more racially diverse, the orchestra was challenged to make meaningful connections with the largest demographic of its population—a

The MSO needed more than a new hall to connect with its changing audience — it needed to be “of” Memphis

population that cares deeply about music, but not the classical traditions of Western Europe. The MSO found itself alone, without the core competencies needed to generate revenue to pay its full-time orchestra over the long term, in a struggle to deal with an aging and disintegrating audience base and to engage a benignly indifferent community.

The board and senior management knew that reaching a more diverse public would require a change in the community's perception of the MSO. At the same time, changing Memphis' perceptions would require a fundamental transformation in the organization. For years, the MSO had thought of its role in the community as one of providing community-related services, such as family concerts, in-school programs, and special performances. But although the MSO offered these services in earnest to enrich the landscape of the city, it was essentially a one-way street. The MSO did not know how to recreate itself in the image of its city—to be of Memphis in a way that truly engaged the community and made people care if the orchestra lived or died.

Eighth grade students at Soulsville Charter School perform as part of a side-by-side performance with Memphis Symphony Musicians

In the end the MSO leadership decided to confront the indifference of the Memphis community boldly and with a new sense of civic activism. It would no longer be a passive onlooker but an active stakeholder and participant in the city's future. Real change began in 2003 when Ryan Fleur became MSO president and CEO.

Memphis Tomorrow: Beginning a Community Conversation

In 2001 a group of local business executives, led by the mayor of Memphis, convened to address the city's diverse needs. Together, they created Memphis Tomorrow and set an agenda for improving economic conditions and quality of life in the city. The agenda called for the city to address debilitating socio-economic problems plaguing so much of Southwest Tennessee; quality public education and services, including services to at-risk youth; entrenched and widespread poverty; public safety; and childhood health. Members of Memphis Tomorrow considered the music business integral to the city's economic development, and they invited ArtsMemphis, the local United Arts Fund, to participate in outlining a set of challenging and far-reaching initiatives.

In 2003 David Loebel took the MSO's new president along on a visit to the mayor of Memphis. A lifelong pianist who had consciously chosen to follow his passion for the arts over a business career, Ryan Fleur was a tireless advocate for re-thinking the orchestra's role in the community. Highly visible and proactive, Fleur concentrated on learning how the MSO was perceived,

which partnerships had potential, and how best to engage the orchestra in the Memphis community. He worked at raising the MSO profile among civic and corporate leaders, government officials, and leaders of community-based organizations. Fleur surprised everyone on that visit. Instead of asking for help from the city, he asked the mayor how the orchestra could help him and the city of Memphis. From that moment, he changed the nature of the MSO's cultural contract with the city by presenting himself as a different kind of leader, one with a new vision for the orchestra and a unique understanding of its role in Memphis and the Mid-South.

The MSO Tomorrow: Bringing the Conversation Home

Ryan Fleur's belief in community activism was as unexpected and refreshing to the MSO as it was to civic leaders. One of a new generation of leaders in the field, he did not grow up professionally in the good old days when orchestras could be built by a few generous patrons, when audiences who knew how to sit still and be quiet flocked to concerts, when music and instrumental education were generally available to kids, when classical music represented a pinnacle of cultural entertainment, and when concert halls could be filled with almost any program. Instead, his leadership has been shaped by a society that has seen vastly different patterns of class and wealth distribution; widespread questioning of classical music's relevance, especially to immigrant cultures that have their own classical forms; new concepts of time and space moving society toward shorter, faster,



By rewriting a few lines of cultural code, the MSO has leveraged whole new organizational capacities

and more superficial exchanges; and information flowing readily via sophisticated technological media, electronic learning communities, and social networks. Could the MSO slow down, go deeper, invigorate values of citizenship and culture, and bring renewed meaning to its art form by using it to engage people in new ways? A thousand years before the first explorers arrived at the site that would become Memphis, the Chickasaw Indians were building the enormous mounds that still rest on the bluffs above the city. What would the orchestra build? What artifacts would it leave? In a city whose history is inextricably linked to the struggle to

improve human relations, Fleur's social consciousness would send him and the orchestra on a journey to answer that question.

The first step was planning. For the first time in its history, MSO stakeholders—through a cross-constituent process that involved musicians, staff, and board members—began work on a structured strategic plan. By the time the process was finished, cultural shifts had begun within every organizational constituency. Artistic excellence was still at the center of the MSO's ambitious future agenda—but with a twist. The orchestra no longer saw artistic achievement as an end in itself, but rather as an enabler of the orchestra's citizenship. The orchestra had always considered itself to be in the business of making music and delivering it to the community—a transactional contract of sorts. Through its planning process, the MSO began to see itself as a service provider that could deploy its musical talents and expertise in a variety of ways—through artistically engaging community partnerships—to meet a range of community needs.

The board adopted the plan in late 2005 and the new approach to community partnerships seemed to be working. Yet inside the MSO, leaders were disappointed in the quality of the projects being designed, in the depth and reciprocity of the collaborations, and in the lack of energy and creativity that was being generated within and

outside the organization. In order to truly develop artistically engaging community partnerships—i.e., projects that grew organically from the orchestra's musical capacity—the orchestra would need creative input from the artists themselves: musicians who would take a leadership role in creating ideas, putting unique artistic shape around them, and interacting with community partners during the projects' design phase. Waiting until the implementation phase to bring musicians on board simply did not produce the kind of ownership, vitality, and impact the orchestra wanted.

Musicians initially viewed the entire concept with a great deal of caution, and engaging them was a slow and carefully managed process. Fleur describes how a long series of incremental steps led to their support and participation. The planning process provided the beginnings of a conversation, and the organization followed up with years of trust-building by continually exceeding musicians' expectations regarding communication and content. The MSO nurtured participation by as many musicians as were interested (and in as many aspects as possible) in order to build ownership and satisfaction. It also spent time developing musician leaders who would carry the process forward. According to Fleur, what has happened to the MSO's internal culture is as significant as what has happened in the community. The two values are so inextricably linked that it is hard to separate them. By rewriting a few lines of cultural code, the MSO has leveraged whole new organizational

capacities. To get there, it took time, and it took some help.

The New Strategies Lab

In 2007, the MSO was selected to participate in the New Strategies Lab, a program offered as part of the Andrew W. Mellon Foundation's Orchestra Forum Program. The New Strategies Lab was designed to help orchestras conceive, research, gestate, and implement innovative approaches to their work. Through intensive pre-work at home, an orchestra focused on getting its innovation strategy ready to implement: defining challenges and opportunities, exploring strategic responses, researching alternative designs and impact, and prototyping strategies. Then the orchestra's cross-constituent design team attended a one-week planning retreat during which they worked on clarifying intent, creative direction, and strategy. The week allowed time for reflection, interaction with teams from other orchestras, and peer-to-peer learning that is not generally available at home. Following the retreat orchestras received additional consulting support to facilitate implementation, helping them bring other stakeholders into the process and build alignment and momentum.

The MSO used its participation in the New Strategies Lab to refine its idea of developing artistically engaging community partnerships. In an ideal partnership, the MSO would bring its

artistic strengths to the table alongside the unique capabilities of partner organizations to design programs that would fulfill specific, jointly identified community needs. In its preparatory work, the orchestra organized two full-day planning meetings. The first gathered a group of 20 musicians, board members, and staff to consider accomplishments and aspirations. In confronting its challenges, the orchestra asked itself two questions: If the MSO were to go out of business, other than the four percent of the population that is generally aware of the orchestra, would the other 96 percent care? Why should somebody who doesn't love (classical) music care whether the orchestra lives or dies? The answers were neither pretty nor comforting.

Humbled and armed with a new self-awareness, the group tackled the question of how they might change the situation. What was the history of innovation in the orchestra? What would success look like and how would the MSO know if and when it was successful? What were the characteristics of the orchestra's past relationship with the community? What were the barriers and constraints to a new approach? What was the real extent of the MSO's commitment to this work? Shockingly, participants admitted that they could think of no innovation in the orchestra's 50-year history. Further, they said that the orchestra had never built a meaningful partnership of any kind. They had a long way to go.

Aided in its exploration by facilitator Eric Booth, the team agreed it wanted to do something authentic and powerful. It wanted to push boundar-

ies. Participants ultimately made a distinction between *strategic* partnerships—those in which partners simply exchange talents or resources—and partnerships that operate on a deeper, more rewarding and permanent level.

Successful partnerships would be based on a profound alignment of core interests and values. Partners would have to know each other well—strengths and weaknesses, assets, needs, operating cultures, and defining characteristics. They would have to understand commonalities and expectations. Finally, they would have to agree on how to measure success.

Now much more enthusiastic about its process, the MSO began researching and identifying potential community partners. It invited representatives of four organizations to attend a second full-day meeting, during which the organizations discussed ways they might work together. Based on the synergies discovered in this exploratory session, two natural partners emerged: FedEx and the Soulsville Charter School, a college-preparatory program that connects music with academics.

By now, a core group of musicians was deeply engaged. All musicians had been invited to give feedback about the MSO's participation in the New Strategies Lab. Ten musicians volunteered to be part of the planning group that would develop the project further and lay the groundwork for the planning retreat. The retreat team itself included two musicians, three staff members, the music director, the board

chair, a FedEx corporate vice president for human resources, the CEO of the Soulsville Charter School, and an outside expert who had done work in the area of community partnerships. During the retreat, the team worked together to outline specific parameters of the two relationships they intended to implement once they returned to Memphis.

INNOVATION IN ACTION

The Orchestra as a Civic Partner

Leading from Every Chair® (Working with FedEx)

Discussions started with understanding the company's core values—speed, integrity, ease of use, and commitment to the community—and moved quickly into discussions of linkages between FedEx and the orchestra. The company's charities are important to it, but the difficulty of narrowing a focus remained. When FedEx identified its employee base as critically important, the MSO knew it had found the basis for working together, since the orchestra, too, was about people. The orchestra already had an existing relationship with FedEx, but an even greater asset was the openness and enthusiasm of the company's vice president for human resources, whose eagerness, ingenuity, and imagination Fleur believed would contribute to an exceptional collaboration. A highly effective internal collaborator, she also could talk about the relationship within FedEx in a unique and powerful way.

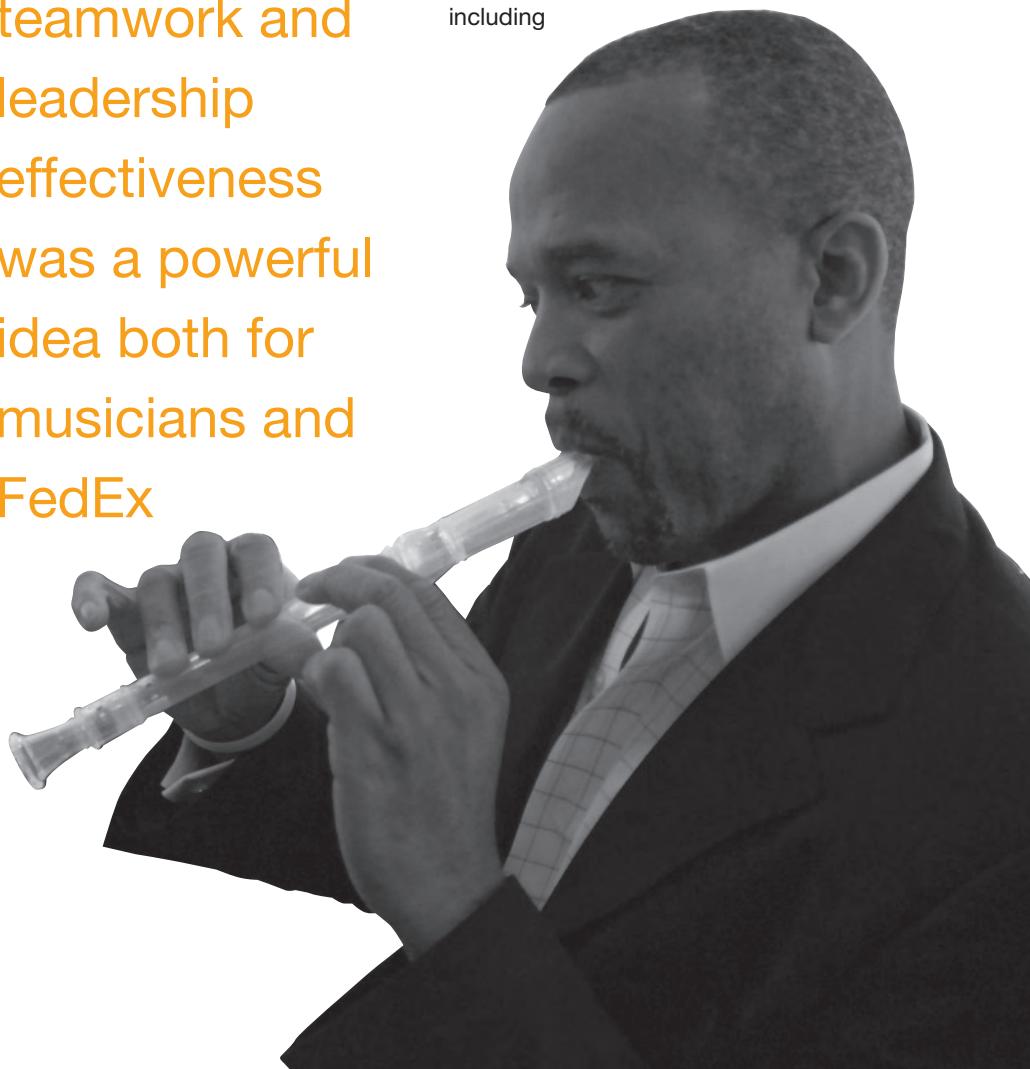
As imagined by the New Strategies Lab team, the orchestra's relationship with FedEx would focus on leadership development. Musicians (self-selected from the orchestra), alongside curriculum writers at FedEx, would design an in-depth, interactive workshop aimed at engaging company executives and MSO musicians in exploring leadership principles, including decision-making, teamwork, and risk-taking—through music. FedEx would provide the specific learning objectives and leadership expertise. MSO musicians would provide the creativity and musical expertise to implement the learning through an artistically engaging experience.

Using music as a vehicle to improve teamwork and leadership effectiveness was a powerful idea both for musicians and FedEx. To gain a better, more informed understanding of the company, MSO musicians visited the FedEx headquarters to learn what employees do, how the business operates, and how work gets done. What transpired on site presaged how natural and reciprocal the relationship would prove to be. FedEx employees were curious about the musicians and opted to spend most of the time learning about them—how the orchestra worked, how musicians knew their roles, how orchestra leaders were developed, how musicians communicate, and what needs to happen to bring a piece of music from programming to performance. As musicians took company employees behind the scenes, explaining how an orchestra communicates with its audiences to make them part of the artistic experience, an organic connection began to

grow, and a journey of collaboration began. Musicians provided insights into how the symphony leads, communicates, motivates and inspires in its own environment, and together the organizations determined how to apply these principles in a corporate environment.

Out of this planning process arose *Leading from Every Chair®*, a day-long seminar that enhances leadership through experiential learning and close study of the symphony orchestra model. *Leading from Every Chair®* inspires executives and professionals to rediscover their own creativity, capacity for innovation, and dedication to excellence. The program guides participants through music-based exercises aimed at strengthening key leadership skills including

**Using music
as a vehicle
to improve
teamwork and
leadership
effectiveness
was a powerful
idea both for
musicians and
FedEx**



A *Leading From Every Chair®* participant masters the recorder as he prepares to perform before an audience of his colleagues

decision-making, teamwork, risk-taking, motivation, and non-verbal communication. Following the first pilot workshop for marketing managers, one community partner said, “There was a lot interesting to us that we didn’t realize in the corporate world—the nuances of teamwork and leadership that we just take for granted.”

Music Mentors (A Partnership with The Soulsville Charter School)

The Soulsville Charter School was established in 2005. Its name is drawn from Soulsville USA, part of the cultural legacy of Memphis’s 1960s soul music powerhouse, Stax Records. When students enter Soulsville, they are usually one or two grade levels behind. Soulsville aims to “catch them up,” and it uses music as a hook. Students at Soulsville are expected to play a string or percussion instrument as an active member of the school orchestra. The school’s focus on music is not an accident, says former CEO Marc Willis. “We’re soul people and string instruments are scalable and no one gets hurt with them,” says Willis. “This is who we are: contemporary music, soul music in an orchestra setting. I wasn’t looking to dive into Mozart. We’re diving into Isaac Hayes. We’re diving into Shaft.”

The relationship between Soulsville and the MSO began soon after Fleur’s arrival at the orchestra so, as with FedEx, the seeds were already blossoming when the New Strategies Lab

opportunity came along. Soulsville frequently uses mentors to provide adult role models for its students. The New Strategies Lab team developed a mentorship project in which MSO musicians would work with Soulsville students on a weekly basis, using the common language of music as an entry point to the mentoring relationship.

The framework for the pilot project, which ran during the 2007–08 school year, provided for approximately six MSO musicians to work with 60 eighth-grade orchestra students. Musician mentors would join the orchestra once a week throughout the year, for a total of twenty sessions each. They also would participate in an orientation session with Soulsville staff as well as in two reflection/evaluation sessions—one at the mid-point of the program and one at the end. David Loebel volunteered to work closely with the school’s artistic personnel to ensure that the school’s values and the orchestra’s participation were closely aligned. The eighth-grade students would attend the orchestra’s young people’s concert, and the Stax Museum would host the entire MSO family, enabling them to tour the school and better understand its philosophy.

The experiment held many challenges for both institutions; of particular concern was the need to assess the level of readiness of the musicians who would serve as mentors. A musician who is paid well to teach private lessons to children whose families have the resources to pay is not necessarily capable of being a successful mentor. Mentoring at-risk young people requires an additional level of temperament, awareness, and understanding. Working at Soulsville also required musical adaptability and sensitivity, good communication skills, and a genuine sense of give-and-take. Willis says, “When it’s a one-way street, that’s when you have trouble sustaining it.” Willis was not interested in “musicians coming to the ‘hood’ and teaching students Bach and Beethoven, trying to impress upon them how valuable and important the symphony is so that the MSO can build its audience base.”

The goal at Soulsville is not musical perfection, at least not in the short term. It’s about building relationships and trust. When trust is established between mentor and mentee, artistic

Memphis Symphony Orchestra violinist Jessica Munson speaks before a side-by-side performance with students from an eighth grade class at The Soulsville Charter School



development naturally takes place as the student becomes more and more interested in the professional life and work of his or her mentor. Says Willis, “Johnny now wants to see his friend who comes to visit him once a week and cares about him. He may not know anything about the music, but he wants to see his friend play. And you can see [the kids] in the audience saying, ‘that’s my mentor right there.’” The enthusiasm and responsibility are returned, as musicians know they are performing for their mentees. There is a personal connection that changes the nature of the musical exchange.

Developing Readiness: Key Enablers of Effective Community Partnerships

The conditions facing the MSO during the 1990s were critical to shaping the orchestra’s innovative behavior. Its lack of historical integration into a city where racial segregation—or at least the memory of it—remains prevalent contributed to the orchestra’s growing irrelevance as a cultural institution. The city’s economic structure and widespread poverty made the orchestra inaccessible to many. Although the orchestra grew significantly in size and quality thanks to the Ford Foundation grant, that growth was not motivated or shaped by a vision of the orchestra’s role in the community. Together, these conditions created a financial crisis that was strong motivation for change and innovation. At the same time, a generational shift was occurring at the MSO, with young staff and musicians bringing new perspectives and feeling less bound to or inhibited by conventional practices. The new vision at the orchestra was born out of a search for new pathways to artistic achievement, and a number of critical enablers fostered a seismic shift within the organization—with musicians leading the way.

The Leadership Team

The motivated, aligned, and mutually supportive nature of the MSO leadership team was fundamental to the orchestra’s ability to go in a new direction. An MSO community partner says, “I like to say that partnerships come from leaders who inspire their teams to make them. [MSO leaders] communicated the vision and people got inspired. This is a good idea and it had good people bringing it to life.” The active participation of the CEO, music director and board chair in setting goals and designing the New Strategies Lab set a standard for the entire organization. That Music Director David Loebel sat alongside musicians to discuss the organization’s future was particularly important. He exhibited a level of commitment, personal investment, flexibility, and community consciousness that produced widespread buy-in from the musicians. A board member says, “The music director really has to sanction this. One of the ground rules in [the retreat] was that musicians were in charge. When they said to the music director that they needed him to stand up and do this, he stood up. If you don’t have that kind of relationship it just won’t work.”

Fleur also has been a strong force and advocate for innovation since arriving at the MSO. By all accounts he has led the organization with tireless resilience, managing difficult and unfamiliar situations that could have

had disastrous consequences. He has built the organization’s internal capacity by nurturing the individual capabilities of his management team. Chief Operating Officer Lisa Dixon fills a critical role in determining how well projects are coordinated. Fleur says, “Lisa is a key success factor in this. I can think creatively. I have the vision. I have the ideas, but Lisa’s a wonderful counterbalance. She’s wonderfully inclusive [and] she commands respect from musicians and staff. I can speak in circles and pontificate, but she can take it and asks what does it mean and what are our next steps.”

MSO Board Chair Dan Poag has played an essential role in raising the board’s awareness, commitment, and understanding of the new role the orchestra hopes to fill in Memphis. He is credited with providing constructive input during the design process that helped guide strategy and avoid what could have been a disingenuous path. Poag believes deeply in his responsibility to foster good board-musician relations. “I think musicians have to feel like they’re part of the decision process, they’re part of the organization and that we’re listening to them,” says Poag. “By the same token, they have to listen to us. We have to be in constant dialogue.” Other board members say that his leadership has helped lead to the “transformation”: thinking of community engagement as a pillar of success in the organization.

Courageous Musicians and Proactive Staff

Taking a new approach to community engagement—one that abandons the concept of traditional “outreach” in favor of mutually fulfilling artistic engagements—requires musicians

to take unprecedented risks. One staff member describes the period of adjustment: “It’s very different for a musician to be preparing and participating in a program like Leading from Every Chair® than playing in a concert. The definition of their job has really changed and it called for some time for growth and time to work through.” Community partners say that musician leadership is the most important factor in the partnership’s success. “We need musicians who can walk that fine line and understand musicians and non-musicians,” says one. “They need to be willing to get out of their comfort zones...and be willing to receive feedback and make changes.”

The artistic, intellectual, educational, and social capital that musicians bring to this process cannot be underestimated. Without these contributions, the quality of the programs would undoubtedly suffer. Their participation adds creative dimension to the project, gives it substance, and adds to the promise of sustainability. Musicians who participate in the new community initiatives now say that “there is this fantastic transit of currency between the musicians and the organization. They’re getting great work from us, and we end up feeling more valued.”

MSO staff are proactive in sharing information and knowledge between and among constituencies. What was once a culture of “spoon-feeding” information to the board has been transformed into a deep trust that allows staff and board to interpret data and information together. Staff, most of whom are musically trained, also work to develop collegial relationships with MSO musicians. They know they cannot do their work effectively with-



out the support of the musicians, and they have built strong alliances with them. Ceding leadership to musicians in designing community partnerships is an intentional and effective internal strategy.

Union Collaboration and Contract Changes

To be successful the MSO knew it needed cooperation from the musicians union, and the orchestra began talking to the union immediately following the New Strategies Lab retreat. Together they drafted a side letter to the existing collective bargaining agreement that permitted service conversions and allowed the orchestra to deploy musicians individually throughout the community. Converting full rehearsal and concert services to individual services is not a new concept in the orchestra industry, but this flexibility is critical in allowing the orchestra to manage its human resources in ways that serve multiple purposes. That the MSO already guaranteed musicians more services than it was using made the solution a win-win for everyone.

Having union representatives who also played in the orchestra was central to moving the process forward. Because

they understood the requirements of successful engagement programs, they were able to move the discussions smoothly and rapidly, enabling the pilot projects to occur during the 2007–2008 season. When it came time to negotiate the 2008–2009 contract, the same leaders again worked to ensure an open dialogue. Participation in the program was optional, and 26 of the MSO’s 36 full-time musicians opted into the new contract structure. They were guaranteed a three-to-five percent increase in pay over what otherwise would have been a pay freeze. Although the orchestra focuses rigorously on financial responsibility, leaders believed that investing in engagement activities by investing in the people whose creative talents would determine their success was well worth the cost. Not only was it worth it, it was imperative as a means of signaling to the orchestra and to the community that the MSO was putting its money where its mouth was. Today a nine-member oversight committee comprised equally of musicians and staff plus music director and board members oversees the artistic engagement activities of the orchestra, ensuring good communication, shared values, and clear expectations.

The widespread musician support for the new artistic engagement model is indicative of their passion and commitment. The MSO also is taking new

Left: A Leading From Every Chair® participant listens as Memphis Symphony Orchestra horn player Caroline Kinsey demonstrates a passage from Beethoven's Seventh Symphony

Below: Memphis Symphony Orchestra Timpanist Frank Shaffer interacts with a Leading From Every Chair® participant onstage during the afternoon portion of the April 2008 workshop



The widespread musician support for the new artistic engagement model is indicative of their passion and commitment

steps toward creative collaborations within the organization. The contract approved for the 2009–2010 season adds a capacity-building component that allows musicians to team up with staff members to work on projects that the organization currently does not have the capacity to handle, such as managing its Facebook page, selling tickets on commission, and other projects.

Cross-constituent Participation

The decision to reframe the institution's service strategy was a perfect opportunity to build inclusion into the fabric of the organization. Having cross-constituent participation and consensus throughout the strategic planning process and the New Strategies Lab enabled the MSO to move forward more effectively with its community engagement efforts. Fleur believes that the partnership program would

never have worked if it had not been for cross-constituent involvement. Now anything that is fundamental to the future of the orchestra involves inclusive cross-constituent teamwork and participation. While one staff member says, "We haven't quite gotten there yet," he adds, "we're really trying to get everyone who's involved on the same team." Board members support the value of creating interaction between constituencies and say that designing community engagement activities is a natural team-builder. Musicians feel particularly empowered in the new environment, describing "a more open playing field," and staff say inclusion is the key to success. "We have this communications task force in which we do lots of fun, morale-building activities," says one administrator. "But that only takes you so far. It's the other stuff where you're actually rolling up your sleeves and working on real good things for the organization that are challenging."

Strategic Communication

Because so many constituents were involved in developing the MSO's partnership program, leaders recognized right away the need to develop formal and informal structures to communicate internally within the orchestra and externally with community partners. Not everyone has the same communication needs at the same time, and the MSO team encouraged informal unstructured dialogue among constituents at all times. It also provided time for structured conversations to ask hard questions, deal with difficult or challenging issues, and make decisions that would move the work

forward. "I was constantly surprised," said a staff member. "We began with communication. No one was left in the dark from the onset. For the most part, we [now] share knowledge equally. We had no communication when I started here. We had to learn how to engage in genuine dialogue."

An Outside Perspective

Starting tough conversations and trudging through complex issues involving change are difficult even in the most effective organizations. Objectivity becomes an issue, as do power, anxiety, control, self-preservation, and the resistance to

the cross-constituent group frame its issues. Booth brought strategic thinking, an objective voice, knowledge of the industry, and a passionate interest in community engagement to the MSO's process.

THREE STEPS FORWARD

Impact and Learning

The MSO's work—which is still in its incipient stages—has had significant impact on those it has touched. Partnerships with the orchestra give members of other community organizations new artistic and intellectual resources to help them in their work. The result is an enhanced perception of what the orchestra offers and an increased desire to seek it out. Of Leading from Every Chair® a musician reports: "Every single person that has been a participant has come away from that day feeling they have a relationship to us and an understanding about what we do that they never had before that day. Subsequently, we've seen them coming back to hear us. My hope is also that when we reach more and more organizations in Memphis with this workshop, that more people in Memphis will view the orchestra as not just a frivolous thing, that we're really serving a need in the community and not just playing concerts."

Said a staff member, "I think the real impact is developing relationships between different segments and creating a fabric. The regional Chamber of Commerce has a luncheon every year and it's a big deal. Two years ago we played and that was nice. Last year we heard that they wanted to do a dedi-

cation to Isaac Hayes, and instead of doing it ourselves we recommended that the kids from Soulsville do it. Soulsville got to play in front of a thousand people. We were the brokers. It's about building a better Memphis—even if that doesn't have an impact on the Symphony."

Partnerships are helping the orchestra discover new audiences and patrons, and they are doing so because they are based on authentic engagements that take the orchestra's most prized assets and invest them in helping community partners address their own needs. Explained Fleur, "We've learned how to have a community dialogue—that means a dialogue amongst ourselves as well. By dialogue I mean how do we know these people, how do we question, how do we identify patterns, how are we genuinely coming across as vulnerable? And when those things happen, then the connections take place. There was a point in time in Princeton when our principal oboe player made that authentic connection with the CEO of Soulsville. Once we made that connection with the two of them, it didn't matter what the partnership was, because there was a level of trust and we were going to figure it out and we were going to grow or fail together."

Musicians say that the impact on them has been transformative. Their enhanced role and responsibilities in the organization have shown them new ways to translate their talent into influence within the organization and into meaningful impact outside it, giving them new skills and making them feel proud and important in ways they had not imagined. Working with outsiders has made musicians realize that "we [are] quite good at different things."

Partnerships are helping the orchestra discover new audiences and patrons, and they are doing so because they are based on authentic engagements

letting go of a familiar way of life. The MSO had help from two facilitators: Richard Evans, who supported the strategic planning process, and Eric Booth, who worked with the New Strategies Lab team. In beginning its preparation for the New Strategies Lab, the MSO understood the limitations and dangers of trying to manage such a large-scale process without help, and staff members say that Booth's guidance proved invaluable in helping

One musician says, "We're learning about our own skill sets. In terms of pride in our work, it's a positive benefit. We feel proud of the work we've done and proud of the organization." This enthusiasm has a direct effect on the staff. As one member of the staff says, "The musicians have transformed themselves to go out to the people and report back. Those musicians are so proud. Seeing their pride is seeing we're succeeding."

Most importantly, the organization is benefiting. The MSO's new focus has been a powerful influence on internal morale and behavior. The cultural shift resulting from cross-constituent work has created high levels of trust between staff and musicians, and that trust has led to new alliances, more open communication, and the influx of new ideas. New leaders are emerging from unexpected places, and the organization is discovering new ways of defining success—definitions that are broader, more interesting, and more compelling to both the community and the orchestra. All this has led the MSO to change to its operations in order to improve its capacity to act. Focusing on collaborative models and cross-departmental functions, the orchestra is aiming for integration rather than traditional decision-making silos.

Specific lessons learned by the MSO include:

- Being perceived as "adding value" to the community in innovative ways is fundamental to making the community more engaged. All communities are different. It is impossible to change the fundamental culture of the community, and the orchestra can

only be successful in its community engagement activities if it understands and appreciates the community's underlying values and needs. It should be part of a larger movement to make the community better.

- Designing good partnerships and creating a productive platform means having the right people involved on all sides. It takes time, effort, skill, patience, and genuine respect. It must be absolutely reciprocal.
- Making partnerships work requires trust, transparency, and effective communication. Nothing should be left to chance. Designated check-in points are critical, and the orchestra should have a structure dedicated to resolving any issues that arise.
- What happens in the partnerships changes the status quo in the organization. Success, satisfaction, flexibility, and responsiveness spill over into the organization's daily life.
- Musicians can and do move effectively outside their comfort zone when the motives are compelling enough. Their efforts make a tremendous impact that should be recognized by the organization.
- Board members can be especially useful to musicians in helping them maneuver through the political and social dynamics of partnership in action.
- The value of community partnerships is real. They promote innovation and learning, and they can be a healthy source of revenue.

→ Measuring impact is difficult but must be built into the process. Partners should identify success measures at the outset.

THE CONTINUING JOURNEY

Future Plans and Aspirations

Many at the MSO believe that the orchestra is in a race against time in the quest for relevance. While the orchestra has not solved all its problems, there is genuine hope from leaders in the organization that the MSO is on the right track. Leading from Every Chair® can be customized and used elsewhere, and the MSO has already implemented it with another corporate partner. In time, the orchestra plans to develop alternate curriculum tracks to expand the program's applicability. Work with

New leaders are emerging from unexpected places, and the organization is discovering new ways of defining success



Recognizing and meeting real needs of the community require sensitivity, self-awareness, and self-knowledge

Soulsville has grown, with 180 students benefiting each year on a weekly basis. Building mutually beneficial partnerships remains the most important item on the MSO agenda, and this takes time, research, and networking. It also takes outstanding leadership, patience when encountering cultural resistance, and a willingness to learn.

The racial demographic of Memphis continues as the most distinct challenge for the MSO. The orchestra knows that reaching the disaffected African-American community is critical if the orchestra is going to truly become “of Memphis.” Recognizing and meeting real needs of the community require sensitivity, self-awareness, and self-knowledge. The better the orchestra knows itself, the better it will be able to make meaningful relationships in the community. This takes

tremendous honesty within the organization, but doing this hard work means that partnerships will be more organic and rewarding. As Lisa Dixon suggests, “Look at the internal structure of your organization and really make sure there is an interest and commitment because the last thing you want to do is start down the path... and then back out. You’ve got to stay committed and see it through.”

Trying to align values with partner organizations means more than just getting acquainted. When organizations are tightly connected, change in either one affects the other. Each organization has to learn how to live and grow with the other. They need to learn to share responsibility and authority—to depend on each other for successful implementation. They need to have an equal stake in the risk-taking. Institutional language and culture create learning curves, and the partners need to be vigilant about monitoring and nurturing the development of their own shared culture, with sufficient time for dialogue, reflection, and evaluation.

Memphis Symphony Musicians including Concertmaster Susanna Perry Gilmore (far right) and Leading From Every Chair® participants listen to directions from the podium as part of the April 2008 workshop

Money, of course, is a challenge. MSO leaders are convinced that as the current business model evolves, it will produce the necessary revenue. Partnerships are financially sustainable when they are artistically meaningful, community-oriented, and tied to a revenue stream. In other words, the MSO now operates on a “People-Service-Revenue” model: invest in the right people, deliver the right service, and revenue opportunities will become available. Today, this principle guides all the organization’s decision-making. Like most orchestras, the MSO must withstand austere economic conditions. Unlike many orchestras, however, the MSO does not believe that a traditional institutional formula—defined by performing concerts, selling tickets, and raising money—meets the community needs of 21st-century Memphis. In addition, the orchestra requires musician input, buy-in, ownership and feedback at every level of planning, and it insists that cross-constituent stakeholders inform all key organizational decisions. The MSO believes that by working across constituencies it has achieved far more than the typical directives for revenue generation and expense reduction to meet its financial challenges. Its new formula—engage artistically, satisfy a community need, and link partnerships to a revenue source—will build capacity and sustain the organization in coming years.

All this takes time, and managing in the interim is a tremendous challenge for the orchestra. Pushing too hard or too fast creates fear and does not allow for the constant checking in that is nec-

essary when building new alliances.

While the orchestra considers its work an investment in long-term health, to an outsider it looks like an expense if the money doesn't come in fast enough. Connecting artistic engagement activities to long-term benefits and determining how to hang in during difficult economic times are two of the MSO's greatest challenges.

The MSO continues to learn. It recently appointed League of American Orchestras Conducting Fellow Mei-Ann Chen as music director beginning with the 2010–11 season. A rising star who served as assistant conductor in Atlanta and Baltimore, Chen has a passion for working with young people and communities and is expected to bring more innovative ideas to the orchestra. The organization has created a new musicians' contract that enables creative new initiatives. It is developing musician leadership in a focused way through dynamic musician-led projects. Soon it will

undertake a comprehensive board engagement process—Involving musicians, staff, and community leaders—and will begin translating learning into building partnerships with audiences.

The MSO is acutely aware of the inherent tension between its dedication to artistic achievement and its new dedication to artistic citizenship. "We certainly [didn't] want to turn into a bunch of do-gooders that happen to be called a symphony but don't utilize our artistic aspects at all," says one staff member. What could be the costs, many wondered, in the orchestra's paradigm shift? Would community focus come at the expense of artistic excellence? Dealing with these worries head-on is critical to the orchestra's

ultimate ability to devise a community strategy that builds partnerships through artistic engagement. While partnerships do not necessarily have concerts or performances as an outcome, the artistic talents of musicians are still the most critical factor in making them powerful and successful. At the same time, the goal of the MSO is to make partnerships an integral part of the orchestra's core music-making, using them as the first step in an ongoing journey that takes newcomers from acquaintance to engagement around mutual goals, to appreciation and participation in a variety of orchestra activities, including excellent concerts. As everyone begins to understand how this works, tensions resolve into enthusiasm and constructive action. That understanding, which tangibly builds each and every day, is leading towards a new organization in which artistic achievement and artistic citizenship are well balanced.



Matthias Kirschner and Markus Groh play
Mozart's "Concerto for Two hands" with
Pacific Symphony in October 2009



Pacific Symphony

illuminating meaning: putting music in context

BEGINNINGS

A Context for Innovation

Orange County represents the new American metropolis. Not a city at all, it has no defined urban center but rather comprises a number of pioneering planned communities that intersect with the more traditional downtown areas of Anaheim, Santa Ana, Orange, Huntington Beach, and Fullerton. Nor is Orange County suburban in the traditional sense. Decentralized, demographically and economically cosmopolitan, and increasingly independent from neighboring Los Angeles County, it reflects the expanding economic and cultural role of many emerging post-suburban communities in America, offering the employment, consumer, and cultural opportunities once associated only with large cities alongside the suburban lifestyle advantages of space, recreation, and first-rate education. Its story is the story of communities across the country.

In this fast-growing and rapidly diversifying community, residents of Orange County must adapt to a constantly changing environment. The majority are transplants—immigrants from diverse backgrounds or business transfers who work in the County's burgeoning high-tech industry, one of the ten fastest-growing in the world. The County's significant international flavor also attracts many leading scientists. In recent years, the region's economic structure has changed significantly as immigrants and ethnic entrepreneurs have assumed an ever greater role.

The rapid economic growth of Orange County also spurred expansion of arts facilities and activities in the region. Founded in 1978 by volunteers who were determined to have a permanent resident orchestra serving the County, Pacific Symphony consisted of freelance musicians who performed in movie studios, universities, and regional orchestras. Led by an entrepreneurial conductor named Keith Clark, the ensemble's programs, strongly flavored with American composers, found a following. In 1986 the orchestra became one of the resident companies at the new Orange County Performing Arts Center, and the following year brought in Louis Spisto as executive director. Spisto built a professional staff, increased earned income, stabilized the Symphony's finances, introduced tenure for musicians, and expanded the board.

Yet by this time the Orange County Performing Arts Center was also host to a parade of visiting orchestras sponsored by the Philharmonic Society of Orange County, one of the largest classical music presenting organizations in the country. What could a resident orchestra add, espe-

cially in a county with no downtown center, a highly diverse and dispersed population, and multiple recreation alternatives? This was a logical question, as several attempts by other ensembles had already failed. In a relatively new community without a tradition of artistic activity, would there be enough interest and support to sustain its own orchestra?

The appointment of Carl St.Clair as music director in 1990 marked a turning point for the Symphony. The Texas-born St.Clair, a former student of Leonard Bernstein at Tanglewood who had served as an assistant conductor of the Boston Symphony Orchestra, brought a distinctive vision: to create ambitious and imaginative projects that would enable the orchestra to reinforce its American identity, resonate with local audiences, yet also gain national attention. Among his early successes was the commis-

sion of Elliot Goldenthal's *Fire Water Paper: A Vietnam Oratorio*, premiered in 1995 with cellist Yo-Yo Ma. In bringing together victims of war, veterans, and community members to generate a dialogue around the performances, St.Clair and the Symphony laid the groundwork for its later commitment to contextualizing its programs in ways that would offer multiple engagement points for audiences perhaps unfamiliar with the music. The adventurous programs also engaged the musicians—most of whom combined their orchestra work with other professional musical activity—and strengthened their identity as an ensemble.

While carving out the orchestra's artistic niche, St.Clair cultivated community ties by committing to an active role as educator. Despite—or perhaps because of—the shrinking commitment to music education programs in the area, a core group of parents and teachers was anxious to work with him. Together they created the Symphony's award-winning Class Act program, which pairs area elementary schools with individual Pacific musicians to work on a particular composer and theme. One of those early volunteers who has continued to guide the program notes that these activities have strengthened the musicians' sense of connection with area parents and families as well as their commitment to the orchestra. The Symphony has continued to expand its educational activities, which now

What could a resident orchestra add, especially in a county with no downtown center, a highly diverse and dispersed population, and multiple recreation alternatives?



Ed Zwick and James Newton Howard lead Q&A at 2009 ACF: Hollywood's Golden Age

include three youth orchestras. Today, Pacific Symphony makes an extraordinarily large commitment of nearly ten percent of its \$17 million annual budget to education and community programs.

With the arrival of John Forsyte as president in 1998, all the pieces were in place to launch the organization into its most ambitious stage of innovative growth. With plans for a new dedicated concert hall on the horizon as part of the Performing Arts Center's expansion, the orchestra would need to be artistically ready for the spotlight and to attract higher levels of support. The board was ready to collaborate with St.Clair and Forsyte toward the goal of deepening and broadening the orchestra's reach by expanding the concert experience.

THE PATH TO INNOVATION

A Contextual Conversation

Forsyte and St.Clair embraced the opportunities that thematic programming offered to add entry points for audiences. But they knew early on that, to create the kind of musical exploration they had in mind, the Symphony needed another artistic voice—a scholar who would add value to the creative mix by increasing the organization's capacity for research and conceptual thinking. In the spring of 2000, historian Joseph Horowitz joined the Symphony's programming team as artistic advisor. A teacher, consultant, and prolific author, Horowitz has been a pioneering force

in the development of thematic programming and new concert formats in musical organizations across the country.

St.Clair and Horowitz closely collaborated that same year to launch the first American Composers Festival (ACF), which has become the defining element of the orchestra's artistic profile. On a parallel track the leadership pursued opportunities for different kinds of community engagement. They were vitally aware of the challenges of making meaning of an art form that is unfamiliar to much of its community and audience. In a region where cultural orientation is increasingly non-European and where Hispanic-Americans and Asian-Americans constitute a large demographic, the Symphony was challenged to make traditional orchestral masterpieces resonate with its audience and to make connections between Western classical traditions and the musical traditions of other cultures. It pushed itself to create new experiences that reflect not only the changing ways artists are thinking about music, but also the growing integration of art forms resulting from the ways people experience music. Most notable among these changes were new concert formats that allow artistic and educational cross-fertilization.

Innovation in Action: The American Composers Festival

One of the country's only orchestra-based festivals focusing on new American repertoire, the ACF is a kind of curated exhibit that brings together all the Symphony's driving interests: It nurtures artistic creativity and excellence. It reflects the orchestra's commitment to American music and composers. It offers contextual programming designed to promote cultural and musical literacy. And it establishes critical cultural links and partnerships with the community. Carefully integrated within the season, the ACF engages audiences around ideas over time, gradually weaving and creating a context that enhances their experience with music and artists, brings new awareness and understanding of issues, and deepens engagement with the orchestra.

Pacific Symphony has produced the festival every year since 2000. Ideas for the ACF can be culturally inspired, as in the orchestra's 2004 festival, *Tradewinds from China*, which examined non-Western influences on American music. They may be chosen to celebrate a major American musical figure, such as *Unchartered Beauty: The Music of Lou Harrison*. They may highlight regional historical and cultural influences, such as *The West: Music Inspired by the American Frontier* or *Hollywood's*

Golden Age. Or they may be designed to explore specific subjects, as in the orchestra's *An American Odyssey*, a season anchored by William Bolcom's *Songs of Innocence and Experience* and devoted to musical pluralism in America in the late 20th century.

Most importantly, the festivals aim to be far-reaching in scope and time, culturally diverse, musically rich, and resolutely focused on answering questions about the American musical and cultural experience.

From 2004–2006, the Symphony took a three-year look at non-Western influences on American music.

→ *Tradewinds from China* (2004) highlighted works by Chen Yi, Zhou Long, Bright Sheng, and Joan Huang in the course of sampling the historic contributions of a generation of American composers from China whose life experiences in both the East and the West have made them advocates of cultural exchange. Raised in urban homes influenced by the West, they were forced to the countryside during the Cultural Revolution, where they became immersed in folk and traditional customs they might not otherwise have learned. Studying composition in the U.S. and Europe, they forged a stylistic synthesis that merges Chinese and Western musical techniques, instruments, and aesthetics. Yo-Yo Ma—who believes that transnational influences and cultural interaction are core components of a creative process—performed a new cello concerto by Chen Yi. Min Xiao-Fen played the music of Thelonious Monk on her pipa, a children's chorus sang Chinese folk songs,

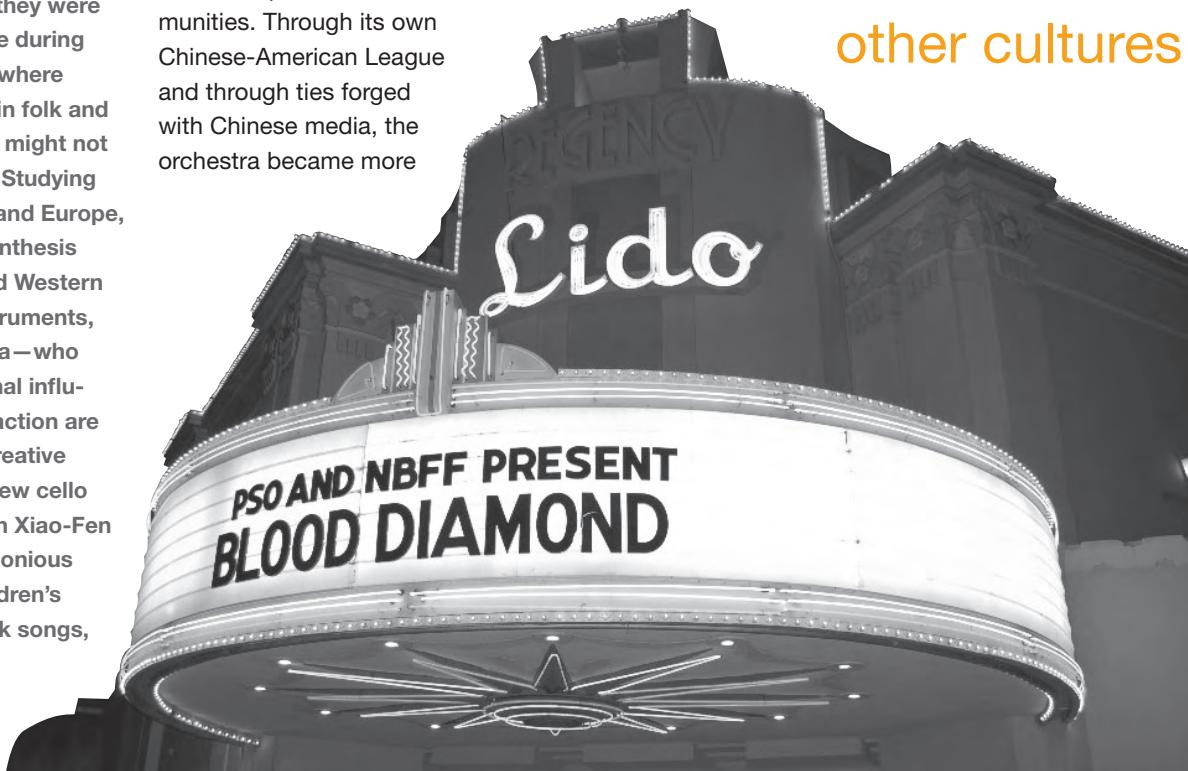
and the Orange County High School of the Arts Chorus performed Chinese revolutionary songs.

→ *Illuminations in Sound* (2005) explored the influence of Indonesian gamelan and featured composers Colin McPhee, George Crumb, John Adams, and José Evangelista. Richard Stoltzman played works by Adams and Steve Reich. Two rarely heard transcriptions by Percy Grainger of piano works by Debussy and Ravel were performed alongside the original pieces.

→ *Uncharted Beauty* (2006) honored the music of Lou Harrison. One of the great American composers of the 20th century, Harrison is recognized as a pioneer in the use of alternate tunings, world music influences, and new instruments. The festival included a variety of intimate chamber programs plus a large-scale concert. It also featured film footage from Eva Soltes' documentary, *Lou Harrison: A World of Music*.

This three-year focus generated visible changes in Pacific Symphony's relationship with non-Western communities. Through its own Chinese-American League and through ties forged with Chinese media, the orchestra became more

The Symphony was challenged to make traditional orchestral masterpieces resonate with its audience and to make connections between Western classical traditions and the musical traditions of other cultures



familiar to this public. While no formal measurements have been taken, leaders have noticed a marked increase in the proportion of non-Western audience members.

One of the Symphony's most successful festivals was *Los Sonidos de México* (2007), which celebrated the remarkable range and variety of Mexican classical music, much of which is rarely performed in Mexico or elsewhere. The festival sought to document the scope of Mexico's venerable musical history (spanning pre-Hispanic to present day), explore recent and contemporary Mexican works, and demonstrate the richness and diversity of both. The festival included two dozen compositions over the course of six concerts, including *Caribbean Airs*, a commissioned work by Daniel Catán, as well as works by Silvestre Revueltas and Ana Lara. A three-hour multi-media interplay tracked music and visual art from pre-Hispanic times to the present.

Pacific Symphony developed *Los Sonidos de México* in collaboration with Gregorio Luke, director of the Museum of Latin American Art in Long Beach; Leonora Saavedra, associate professor of music at UC Riverside; and composer Daniel Catán.

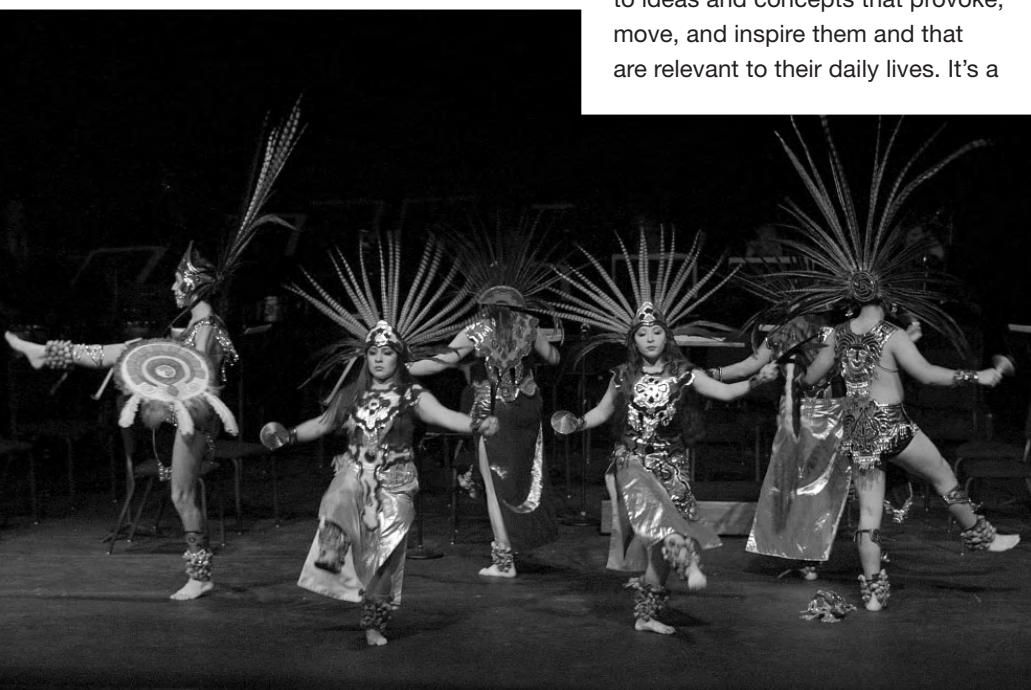
Contextual materials included special program notes and festival publications, discussions with musicians and composers, a dedicated website and participants' blog, and a special book of essays. The Symphony coordinated festival promotion with Orange County's Latino community, and worked with local television and radio stations to develop in-depth profiles of the festival. Latinos across generations attended the festival. One community leader reported, "This event gave our people a sense of pride....Some people didn't know that Mexico had a classical music tradition. And to see world-class performers appearing there was just a wonderful experience." The festival was an even greater revelation for non-Hispanics who gained understanding of the vast richness of Mexican culture.

Defining Identity: How Cultural Context Informs Artistic Vision

Pacific Symphony operates on the belief that people make connections to ideas and concepts that provoke, move, and inspire them and that are relevant to their daily lives. It's a

subtle but important distinction—the difference between programs that are loosely and sometimes artificially constructed based on common style, genre, or subject matter and those that are made to advance a deeper artistic or cultural conversation. The orchestra also assumes a responsibility to contribute to the evolution of orchestral music because music, like communities and cultures, is dynamic. As one musician says, "I think it is really important that art be viewed as a living, breathing thing." For this reason, the Symphony is committed to "art-in-the-making," actively supporting the work of living composers and experimenting with cross-disciplinary hybrid projects that stretch the definition of "concert" and obliterate disciplinary boundaries. This marriage of interests—deepening understanding of music through contextual presentation, engaging the community to explore issues and ideas, and celebrating the American musical heritage—is the philosophical impetus behind the institutional thinking at the Symphony.

The orchestra's programming imperative, therefore, is not simply to be thematically based, but rather to be innovative, concept-driven, and context-based, regardless of repertoire and regardless of whether the orchestra is programming a festival or a one-time event. "How does this relate to our community today?" is the question most often asked by staff when planning a festival or event. They believe that constant dialogue about culture and context produces more powerful programming decisions. Even



Ballet Folklorico dancers at ACF 2007:
Los Sonidos de México



when programming a piece solely for specific musical reasons, the team considers and discusses the need for contextualizing the piece for an intended audience. It is an approach that is neither formulaic nor prescriptive. When there is good reason to position work contextually, it becomes a high priority. What is important is that an examination of the possibilities informs decisions.

"Everything we're doing aims to enhance appreciation, understanding and respect for the art form," says St.Clair. "We're trying to not only create a concert that has artistic value but we're trying to contextualize it so that the entire experience is one that has a uniqueness, an educational component, a certain festivity about it so that it's not your typical night out with a partner, date, or spouse." The result is a season of extraordinary depth—organized around a centerpiece of festival concerts—with multiple points of entry for the audience. Ideas and musical content are illuminated over time through concerts, non-musical performance events, live commentary, essays, seminars and symposia, multi-media presentations and enhancements, lectures, exhibits, and other activities—all designed and coordinated to trace the cultural evolution of music and ideas;

to help audiences make connections between a composer's impulses, influences, and intentions and the music they are hearing; to build understanding, appreciation, and intellectual capacity in audiences and staff; to promote dialogue around issues and ideas; and to link the orchestra's work with the personal lives of its audiences.

Some programs evolve from historical events that resonate in the community, while others relate to newsworthy events, such as the 50th anniversary of NASA or the 50th anniversary of the Hungarian Revolution. They might arise out of a partnership opportunity, as did the American-Russian Festival that marked the opening of the new Concert Hall. Collaborating with the Orange County Performing Arts Center, Valery Gergiev and the Kirov Orchestra/Opera, pianist Alexander Toradze and members of his piano studio, the Symphony explored jazz connections between Russian and American music, including the significance of jazz as a symbol of freedom in the former Soviet Union.

Carl St.Clair speaks to audience after "Tchaikovsky's Pathétique," the second of three 2009-10 Music Unwound concerts

Other ideas are more personal. In response to the anxieties facing people today, St.Clair wanted to use Tchaikovsky's *Pathétique* Symphony to examine elements of the composer's personal journey. He suggested using a theatrical approach to illuminate Tchaikovsky's psychological landscape near the end of his life. What resulted was a semi-biographical, dramatic performance employing an actor, stage lighting and visual images. A Symphony board member of Syrian origin wanted to perform the music of his own culture as a means of creating an Arab-American dialogue. The result: *Arabian Nights*, a partnership with the Syrian National Orchestra that included a program of works by Syrian composers performed by instrumentalists using traditional Middle Eastern instruments, and anchored by Rimsky-Korsakov's *Scheherazade*.



An idea is right for Pacific Symphony if it satisfies the artistic appetite of the orchestra; offers significant opportunities for collaboration and partnership; can be fully realized only by creating a contextual tapestry woven from a variety of formats; provides cultural connections to the community; increases cultural and musical literacy; expands audience engagement and satisfaction; and helps shape the orchestra's commitment to American music. The concept must also be broad and rich enough to accommodate multiple programs that can inspire both individual and collective meaning.

They want their audiences to come away saying, “I’ve been changed by this experience”

This approach requires a deep awareness of and respect for the heritage of other cultures. Among the orchestra's communities are some that are composed, to a large degree, of Korean, Vietnamese, or Mexican immigrants. Being proactive in responding to community cultural orientations requires the orchestra staff to be open, flexible, and creative. It also means being in constant conversation with the community, building relationships and trust, and taking risks. The entire organization is committed to the process. As Forsythe explains, "There is a highly sophisticated world of classical art that exists within many different cultures," he says, "that manifests itself in ways that are quite different from how symphony orchestras are used to navigating. People treasure their own heritage and their own traditions within their heritage. At times, Pacific Symphony has fallen into a trap of imposing the historic greatness of classical music on a culture that has a different set of values, [but] when we integrate their cultural greatness with

our traditions, something even more interesting can come from it."

Artistic vision and outstanding performance are first priorities here, as at other orchestras. But while Pacific Symphony routinely performs programs with traditional repertoire, it rarely does so without at least some engagement from the stage, through electronic media, or in the lobby. The success of an early interactive Sunday afternoon series devoted to single masterworks, first deconstructed and then performed, laid the groundwork for audience engagement practices that became the second hallmark of the Symphony's contextual work. Eventually, St.Clair incorporated this format into the orchestra's regular series. Those programs now are among the most popular.

St.Clair and Forsythe recognize the inherent temptation to put works together on a program simply because they meet a thematic requirement; they made this mistake in early programmatic efforts. Their experience in contextual design now enables them to consciously work to avoid this pitfall, carefully and strategically choosing works that illuminate one another within the context of a fundamental idea. Forsythe acknowledges that they have not always been successful, but they continue to learn and improve the process.

In its work, Pacific Symphony is guided by five core institutional beliefs:

- As a result of new delivery channels for musical content, public tastes are more varied than they used to be.



Symphony horn player Russell Dicey demonstrates the French Horn with Jacki Sellers demonstrating the Wagner Tuba at "Alpine Symphony," the first of three 2009–10 Music Unwound concerts, sponsored by the Mellon Foundation



- People relate better to art that reflects their background and current living environment.
- Performance and appreciation of the standard orchestral canon can be enriched through contextualization.
- New composers should have opportunities to present their work in thoughtful ways that ensure greater receptivity.
- Presenting American music to American people—in all their diversity—builds a cultural landscape rooted in our indigenous context.

Developing Readiness: Key Enablers of Program Innovation

Pacific Symphony leaders say that the orchestra's relatively short institutional history and its location in the shadow of Los Angeles free it from ingrained industry expectations and traditions. Unlike many orchestras that have to struggle with the legacies of their environment, the Symphony has an easier time breaking out. Because Orange County is home to many start-up companies rich in creativity and intellectual capacity, innovation is standard practice. The cultural vitality and diversity of the community offer a rich source of knowledge, material,

and partnership opportunities. The relative inexperience of the audience (many of whom are newcomers to classical music) liberates the orchestra from the sometimes confining expectations of more historically stable and homogenous communities. The rapid growth and transient nature of the region suggest the need for institutional anchors that contribute to the social fabric of the community. These conditions challenge, encourage and empower the Symphony to push the envelope, taking big risks in hopes of big rewards.

A number of enablers and success factors have helped Pacific Symphony take advantage of the conditions that create fertile ground for experimentation:

Committed and Inspired Leadership

The strong philosophical and temperamental partnership between St.Clair and Forsythe is the driving force behind the Symphony's innovative work. Both have an abiding faith in the power of music to change lives, and they rejoice in bringing the community together to celebrate the diversity of the art form. Forsythe says, "I don't believe I have approached my career as a business person who happens to love symphony orchestra music but rather as a passionate advocate for the art form. What could I do to bring this orchestral music to as many people as possible

and to as diverse a population as possible? It's often humbling to realize how few people are connected to orchestral music, but these thoughts motivate me on a daily basis."

St.Clair relishes his role in managing the complexities of the Symphony's programming process. Highly confident, with strong musical values and convictions, he sometimes takes the lead in developing contextual ideas. At other times he acts as an editor or arbiter, seeking to refine and strengthen the ideas proposed by others in the organization. St.Clair says, "I have sought to create an atmosphere of participation and to encourage multiple viewpoints. It's not that I am passive or simply 'tolerate' participation. I have intentionally tried to ensure that there is an atmosphere of total involvement. We are a family and a team. In the end, however, there also has to be someone who has the final responsibility, and in our case that is the music director."

A strong leadership team enthusiastically takes responsibility for bringing the Symphony's diverse community together to celebrate and explore the art form. They want their audiences to come away saying, "I've been changed by this experience," but they are equally committed to being changed themselves by the discoveries and learning that come out of their engagement with new material, unfamiliar cultures, and non-traditional

“Each and every time we put on a thematic concert we try to do something extraordinary. We do not always succeed, but the Symphony’s values are clearly excellence and innovation”



partnerships. Respect for a myriad of art forms, and deep commitment to audiences, inform and motivate their leadership actions.

A desire to break away from ingrained industry practice and to think differently about what constitutes meaningful musical interchange characterizes the Symphony’s leadership at all levels—from music director and president to musicians and staff to board members. St.Clair’s knowledge, convictions, and artistic values set the tone for the organization. His open-minded curiosity creates a sense of adventure for the organization, allowing it to say, “Let’s do it.” The enthusiasm and commitment of musicians are critical to success. Their openness to learning new repertoire, their support for diversity in programming, and their creative ideas

enable staff to pursue a myriad of projects that would be difficult in other circumstances.

Forsyte says that his own leadership journey has taught him “how difficult it is to be successful in this area and how many obstacles there are—perceptions, old biases toward classical music, and prejudices that can alienate classical music from the rest of the world.” St.Clair and his single-minded beliefs and passion were critical to convincing others to come along. Board members help by being outspoken about making the orchestra relevant to the community, by offering financial support, and by generating programming ideas. Eileen Jeanette, vice president of artistic and

orchestra operations, plays a critical leadership role, bringing ideas to fruition by nurturing and enabling the strong personalities of her colleagues. She says, “I am like a mom here. It’s a central role.”

Core Artistic Commitment

Pacific Symphony’s definition of excellence is always evolving and expanding. Making concert experiences personal for audiences and paying vigilant attention to the new ways artists are thinking about, creating, and sharing art are considered essential to artistic integrity. Everyone in the organization accepts that it is not just a great *performance* that will bring audiences back, but also a great *experience*. One staff member says, “Each and every time we put on a thematic concert we try to do something extraordinary. We do not always succeed, but the Symphony’s values are clearly excellence and innovation.” A musician credits the music direc-

tor with helping musicians “let go” of certain expectations, allowing them to “run” with new possibilities and share the stage with generosity and enthusiasm. “A symphony orchestra is used to being the center of attention on a stage so if there is something else drawing the audience’s attention, you feel like your artistry is being pushed a little bit to the side. There is some of that stuff that has to be worked through. It takes a willingness to let go of some expectations. When that happens, the orchestra is able to play at a really high level and do it with an *esprit de corps*—and that makes the artistic outcomes more successful.”

Team Process

The development of an effective team process has been a critical element in producing the Symphony’s festivals and seasons of unusual complexity. The ACF team comprises the music director, the president, the artistic advisor, and the vice president of artistic and orchestra operations; composers, other scholars, board members, musicians, and staff also provide valuable input. Planning begins 18–24 months in advance, and the team meets regularly throughout both the planning and the implementation phase. The team’s first priority is to select an idea that is “relevant to modern people and to their contemporary lives.” Integrating multiple perspectives is the most important consideration at this stage, and Forsyte likens the process to what he imagines happens in the Atlanta

Symphony Orchestra’s War Room. “Having a group of experts at the table can be very useful, but it can also create confusion about who exactly is making the artistic decisions in the institution,” he says. In the case of Pacific Symphony, final decisions are made by the music director, but only after vetting opportunities and possibilities with the team. “I have to figure out what is the right balance of all these different issues and ensure that the audiences are having a really positive experience through the entire trajectory of a season,” says St.Clair.

Once the team agrees on an idea, it begins working with a basic template—a main subscription program for the full orchestra, a chamber music program, and other concerts and activities designed to infuse the festival with life. This is not a linear process. The entire organization is engaged simultaneously. Horowitz is researching, writing, and putting shape to the original idea. Ideas about programs are flying. Partnerships are being developed, and community engagement activities designed with appropriate constituencies and stakeholders. Will there be commissioned works? How will the festival spill over into the orchestra’s education program? Should there be DVDs and CD-ROMS, exhibits, lectures, films, a dedicated website? What should be in the dedicated program guide? What are the costs? Are there compromises to be made? How will the core festival ideas be expanded, “contextualized” and marketed? How will money be raised? There is work for everyone in the organization.

Naturally, things do not always go smoothly. According to Forsyte, Jeanette has “saved the day” many times, keeping the process moving forward despite threats of breakdown and disagreement. She is the “connector/implementer” whose knowledge of all areas of the orchestra as well as her understanding of the personalities involved enable her to intervene effectively. She uses her role as peacemaker to manage the egos and thought processes of strong-minded individuals, and her function is both articulated and understood within the orchestra. “I have to use different styles for different people,” she says. “Sometimes Joe [Horowitz] thinks I get in his way, but he respects me and we have a really good relationship. John [Forsyte] knows I fix things and that if he asks me to do something it will get done. Carl listens to me because we are a bit of soul mates when it comes to the musical experience.” Forsyte credits Jeanette and her team with being “meticulous on execution,” a critical skill when it comes to translating all the big ideas into action.

Musician Dedication and Versatility

“One of the biggest things that we have to overcome in our identity is this concept that we’re not a real symphony orchestra – that we’re a freelance or pick-up orchestra,” notes St.Clair. “We are America’s largest budgeted ‘per service orchestra,’ but our musicians receive tenure and many have long histories with Pacific Symphony. They are committed to molding a unique American

orchestra—one that is highly flexible, versatile, collegial, and responsive to the changing cultural landscape. Composers and guest artists routinely comment on their willingness to adapt and focus on new techniques. They're very dedicated to the well being and to the artistic standards of Pacific Symphony."

St.Clair and Forsyte have consciously sought ways to enhance the musicians' identification with the orchestra. The education programs and a chamber music series have given musicians more personal interaction with audiences as well as more income. In 2005–06, St.Clair and the Symphony made their debut appearance in Walt Disney Concert Hall in Los Angeles to perform at the League of American Orchestras' 2006 National Conference. They also embarked on their first European tour, performing in nine cities, including Vienna. "We took a big risk," concedes Forsyte. "Until then we had not played outside Palm Desert." But the performances received enthusiastic reviews, and created what Forsyte terms "a galvanizing moment" for the musicians. "It affirmed that they could deliver on the international stage just before the new hall opened in Orange County. Their sense of cohesion, their credibility with skeptics in the community, and their self-confidence all soared. It was not coincidental that the repertoire included a very broad range of the Symphony's styles and Carl addressed

audiences just like he would in Orange County. European audiences were surprised and delighted."

The complexity and variety of the Symphony's programs require musicians to be both facile and efficient in performing in a broad range of musical styles. Performing new music and music from other cultures means they must be comfortable with diverse notation and instrumental requirements. They must be sympathetic to the creative process, having the patience, tolerance, and genuine interest to work side-by-side with composers as equal collaborators. They must be able to make quick adjustments, and capable of finding a common language with artists who may be very differently trained than they are. They must be good communicators who are able to interact with audiences, participate in a wide range of education programs, and help the artistic team refine programmatic concepts.

Musicians say that the Symphony's approach has been "nothing but good" for them. One musician—who says he is a "standard repertoire kind of guy"—adds that musicians support the programming strategy and that they "are loyal to it now more than ever." Good will, advocacy and

cooperation are among the most important contributions made by musicians to producing first-rate contextual programming. Musicians at Pacific Symphony also must enjoy a "good stretch." As one musician says, "people are very objective and willing to try anything." Another adds that musicians are "very open-minded" and that they "put everything on their plate with sincerity."

Musicians suggest that their multi-faceted careers—including experience in academia and film studios—contribute to their flexibility and openness to experimentation. In describing the Symphony's experience in commissioning and performing Elliot Goldenthal's Vietnam Oratorio, one musician says, "The last movement was not composed, was not printed until the dress rehearsal, because Hollywood composers are used to composing while they work. So we actually had to deal with that, and we survived the experience. There are challenges, but I think people kind of welcome that and enjoy the freshness of the approach."



Pacific Symphony performs on its first European tour in 2006

Thinking conceptually— not only for individual concerts, but also across entire seasons and even multiple seasons—is new territory for many orchestras

Knowledge-based Resources and Partnerships

Thinking conceptually—not only for individual concerts, but also across entire seasons and even multiple seasons—is new territory for many orchestras. Designing a complex and interwoven set of interactions that together complete an entire experience requires information, research, and intellectual capacity. Pacific Symphony has put into place significant knowledge infrastructure to support its work. Outside experts provide critical historical and scholarly input to the organization's own musical knowledge base. Structured relationships with culturally specific communities in Orange County enhance the organization's capacity to understand and work in other traditions. A core group of citizen bloggers writes about the Symphony regularly, and the orchestra is exploring ways to use new media resources and behaviors to enhance community connections and to expand the organization's knowledge about itself and its community. The Symphony was recently rewarded a multi-year grant from the Andrew W. Mellon Foundation to expand its work on engagement practices, and has hired a director of audience engagement.

Partnering with scholars over the long term is unusual for orchestras, but the relationship with Horowitz has provided continuity, institutional memory, and momentum for the Symphony. He serves as an institu-

tional knowledge-builder. While the orchestra is busy creating context for the public (with Horowitz's scholarly input), Horowitz also provides context for the orchestra's own process, helping the organization understand and learn from its experience. Unlike museums, American orchestras "typically don't have scholars on staff," says Horowitz. "And unlike museums orchestras don't typically produce distinguished publications. There is often a lack of intellectual capacity that can be crippling with regard to innovation." At Pacific Symphony they are working to change that. One musician credits Horowitz with expanding his own musical horizons, saying, "Joe [comes] up with all kinds of great ideas, and I find that I learn a lot about some kinds of music that I never would have known about, like the Chinese music we did. For me it's a learning experience....I really enjoy [it]." In addition to Horowitz, the orchestra brings in other experts as needed for individual

projects. Some bring opposing viewpoints, which, Forsyte says, "has also strengthened our thinking."

Pacific Symphony manifests a genuine reciprocity with the community that historically has been uncharacteristic of orchestras. St.Clair knows it's not a one-way street. "If you build it will they come? Not necessarily," he points out. "Knowledge partnerships" are critical, and building long lasting relationships with groups and institutions is an ongoing task that the orchestra and its board take very seriously. Through its Chinese American League and Hispanic Advisory Committee, for example, the Symphony has built audiences that have helped guide programming decisions. The orchestra learns from its cultural partners, and what it learns influences how it conceives, produces, markets, and evaluates its festivals. During *Los Sonidos de México*, its 2007 American Composers Festival, the Symphony's Hispanic Advisory Committee counseled that they establish connections to youth education programs in the largely Hispanic community of Santa Ana, advertise in Spanish, and consider programming concerts that juxtapose traditional classical music with composers from Mexico. All of these recommendations were implemented successfully. The Symphony was the centerpiece of a national

news story by the Spanish television network Univision underscoring the opportunity for Hispanic community members to engage with symphony orchestras like Pacific.

Partnerships with universities also provide resources to support festival programming. In 2008, Chapman University presented a screening of the film *The Plough that Broke the Plains* with live orchestral performance as part of *The West: Music Inspired by the American Frontier*. The orchestra's 2010 festival, *The Greatest Generation*, included partnerships with Cal State Fullerton and the Orange County High School of the Arts. The festival focused on how the generation of the 1930s and 1940s responded artistically and socially to the historical challenges of its time. Legendary documentarian and New York University professor George Stoney participated in the festival, contributing film material, artistic work influenced by the Depression, and professional perspectives. In addition, young filmmakers at the Orange County High School of the Arts, mentored by Stoney, have created original documentaries related to the themes of the festival.

The Symphony also has invested in sequential educational programs in the public schools, and its edu-

tional partners work with the orchestra on planning festival programs from the inception; now they are exploring how festivals and contextual concerts might provide humanities content to middle schools and high schools. In recent years, members of the Symphony's three resident youth ensembles have become involved in festival planning.

THREE STEPS FORWARD

Impact and Learning

The Symphony has been doing contextual-based programming since 2000, and the approach has become part of its institutional DNA. "If programming comes out of nowhere people are unprepared and it can be baffling and confusing," says one Symphony staff member. Another adds, "This work is a source of institutional pride. It is not simply a mechanical process where you look at a calendar and insert things from the traditional repertoire that you think people might like to hear. This is more of a mission."

The orchestra has grown its classical and pops offerings by nearly 40% over the past decade, presenting as many as 100 programs each season. Pacific Symphony has balanced its budget for nearly 20 years, but has seen a 42% increase in single ticket sales over the last two years; many of these new listeners signed on for thematic programs. Audience surveys and other measurements indicate that the programming and engagement strategies are working. At the recent Tchaikovsky Portrait program, over 89% indicated that the format change and audience interaction have enhanced their appreciation and commitment to classical music. The National Endowment for

the Arts has recognized the artistic value of the American Composers Festival by repeatedly awarding Pacific Symphony grants equivalent to those of orchestras of much larger budget sizes. The James Irvine Foundation and American Express have both made multi-year investments in these programmatic efforts. Pacific Symphony soon will conduct its first quantitative measure of the success and impact of its programming approach. With a grant from the Andrew W. Mellon Foundation, the orchestra will study its audience's intrinsic response to contextual programs and engagement activities.

The ten years of the American Composers Festival have generated major attention to and support for living American composers, both emerging and established. National and international publications like the *Wall Street Journal*, *Christian Science Monitor*, and *Financial Times* of London have written extensive stories about the Festival and the Symphony. St.Clair has continued to commission works from composers featured at the festivals, and has been invited to bring works and programs that he has developed in Orange County to other American orchestras. In recent years, he has expanded his efforts by taking these concepts abroad to Germany, France and Australia.

In the meantime, orchestra stakeholders have observed a growing impact on the orchestra's relationship with the community. At the recent ACF program entitled *The Greatest Generation*, veterans of war were invited to attend the concert gratis. Many wore their uniforms and greeted patrons when they entered the hall. Veteran support groups were invited by the Symphony to ask for donations in the concert hall lobby. During the concert, photo images of Orange County veterans from World War II were projected above the orchestra. One staff member recalled "the incredible amount of emotion in that building."

The *Los Sonidos de México* festival attracted many new audience members from Los Angeles, as well as a large contingent from local Hispanic communities. Much of the suc-

The Symphony expanded its cultural horizons in 2009 when it was joined for a concert by members of the Syrian National Orchestra

cess was due to strong partnerships facilitated by a Festival Advisory Committee composed of business, artistic, education, religious, political and community leaders and headed by the mayor of Santa Ana. Many Hispanic families attended all the concerts and participated in post-concert discussions with the artists. More than 18,000 people participated in the Festival's artistic and educational activities over the two-week period. The Advisory Committee has continued to build ties with the Hispanic community; one member regularly brings 50 to 100 people to Symphony concerts, including those that have no Hispanic theme or artists.

Today, Pacific Symphony's identity is inextricably linked with its dedication to contextual programming, and the orchestra serves as a touchstone for audiences from diverse ethnic and socio-economic backgrounds. It has now offered programs serving Armenian, Chinese, Korean, Mexican,

Southeast Asian, Russian and Syrian audiences. Perhaps one of the most important benefits of the work has been its ability to break down social barriers and confront stereotypes using music as common ground for cultural dialogue and interaction. As the result of a partnership with the Syrian National Orchestra, hundreds of Arab-Americans purchased tickets and many stayed for a post-concert reception, informing the Symphony's staff that they felt honored and welcomed by this event. For many, it was their first symphonic experience, and

**Never underestimate
the power of the right
idea to unify an artistic
and social experience**



they admitted trepidation in venturing into the concert hall.

Still there is much work to be done. Although some traditional audiences have found the journey invigorating, others remain frustrated that the Symphony does not offer a steady diet of traditional programming. “There are definitely people complaining about the fact that we’re talking during a concert,” acknowledges Forsythe. “And there’s frequently commentary from music critics who debate the merits of the audience engagement practices.” Yet if the audience hasn’t been completely transformed, Forsythe believes that the Symphony’s approach is starting to pay off. The audience is more diverse and more trusting. “I am seeing an audience that looks really different than it did ten years ago,” he says. “There’s no question.”

Pacific Symphony’s experience in contextual programming has had significant impact on the organization by building new capacities and transforming it into a learning organization. The experience has deepened knowledge of music across genres and cultures, and it has taught the orchestra how to draw musical inspiration from unexpected sources. Learning that public tastes are more varied than they once were gives the organization courage and reinforces its urge to innovate. Working together, often in unfamiliar

territory, has helped develop shared values across constituencies and a new sense of identity. Musicians are energized and have developed new technical competencies. Staff have become more multi-dimensional and collaborative. They are more adept at identifying opportunities for cultural connections and more comfortable about pursuing new relationships in the community. Funders are receptive to the Symphony’s unique conceptual approach, providing new resources to support its efforts. Maintaining these community connections, however, requires constant vigilance and prioritization. The orchestra has added new directors of both community engagement and audience engagement, to furnish much-needed support in determining the optimum types of activity and levels of investment going forward.

Some of the lessons learned by Pacific Symphony include:

- ➔ Start by making sure that the orchestra has the right team in place—one that is knowledgeable, brings diverse perspectives to the process, and is capable of bold interaction.

**Take risks.
All contextual programs are not equally successful, and some do not succeed at all.
Learn from your mistakes; don't be ashamed.
Don't give up.**

An Alphorn is demonstrated at the “Alpine Symphony” Music Unwound concert in 2009



- Engage the Music Director in evaluating content to ensure the highest possible artistic results.
- Design a decision-making process that builds consensus and enthusiasm throughout the organization.
- Leverage internal knowledge and outside expertise. Be honest about one's capabilities and limitations. Cover the orchestra's weaknesses and remain open to learning at all times.
- Resist the easy solutions. Always be clear about why one is doing something. Don't choose an idea or put pieces together on a program just because they are catchy or because they look right. Do it because it reflects and advances your mission.
- Never underestimate the power of the right idea to unify an artistic and social experience. Don't be too heavy-handed. Balance edification with pure musical joy.
- Take risks. All contextual programs are not equally successful, and some do not succeed at all. Learn from your mistakes; don't be ashamed. Don't give up.
- Understand your environment. Building institutional relevance through contextual programming starts with understanding the composition, needs, and aspirations of the community as a whole and of the individual communities within it.
- Build on what others are doing. Learn about existing community efforts and interface with them whenever appropriate. Collaborate. Make friends wherever you can. Be aggressive and proactive about this.

- Trust the audience's willingness to learn. People are innately curious, and they want to "get it."
- Don't worry if your traditional audience doesn't always respond. While orchestras absolutely treasure their loyal patrons, sometimes it is not possible to excite all segments of one's audience. And think about all the new people an orchestra can touch.
- Be proactive about setting and managing expectations.

THE CONTINUING JOURNEY

Future Plans and Aspirations

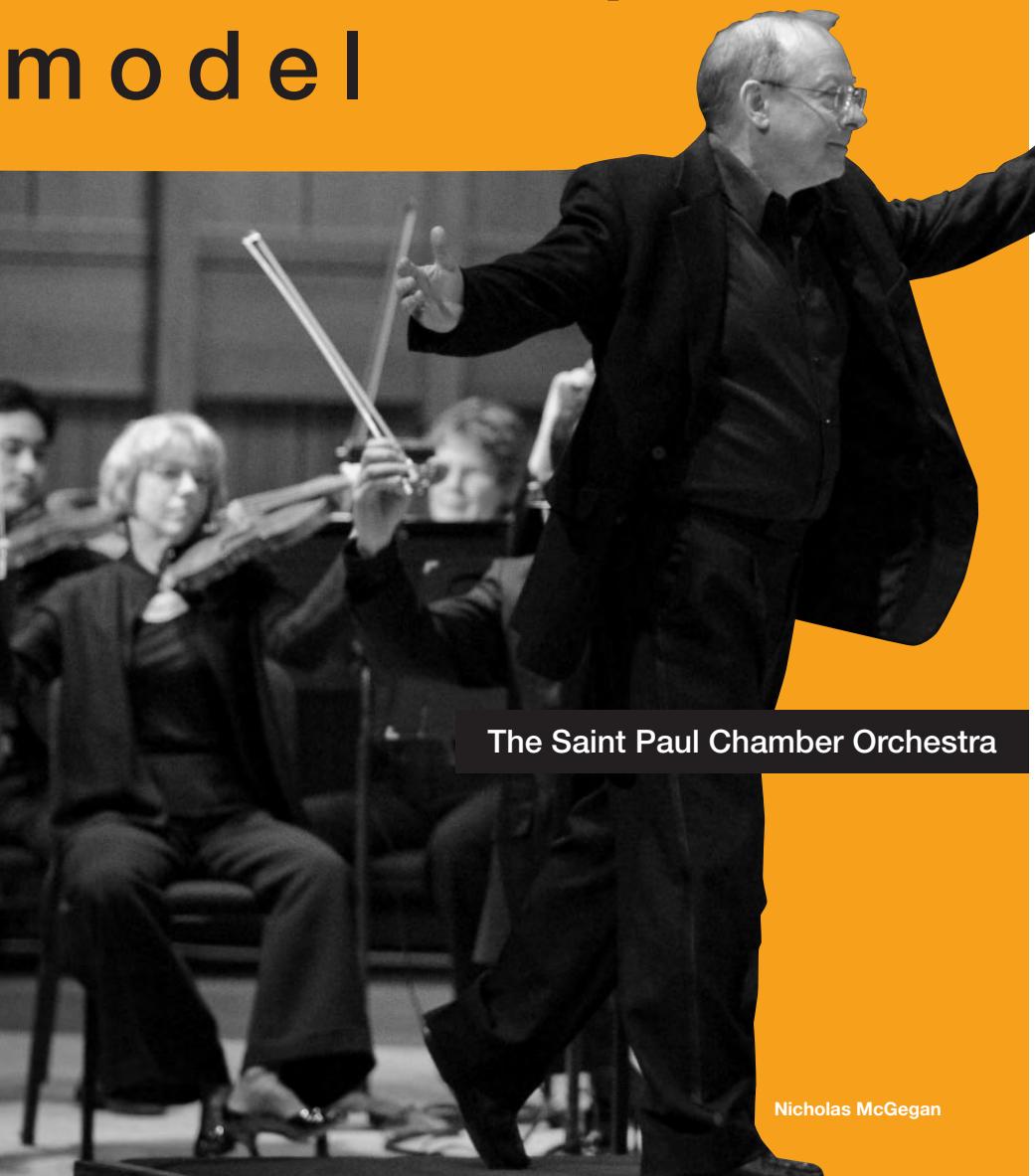
Pacific Symphony operates in a rapidly growing and diverse community where innovation is a way of life and where classical music does not have deep roots. When the Symphony began its own journey toward innovation, its leaders knew one thing: new pathways were needed...new language...new synergies. The imperative to build value for the Symphony by facilitating entry, creating social and cultural connections, and illuminating meaning through a variety of lenses was the driving force behind the orchestra's commitment to contextualizing music. A decade of successful practice demonstrates the sustainability of the approach. It certainly has proven right for this organization in this time and place.

Creating contextual programming poses many challenges—geographical, social, cultural, psychological, and financial. As Pacific Symphony moves deeper into this uncharted territory, it realizes that the community engagement challenges are huge. The Symphony must find ways to serve a large geographic area with a total population of nearly three

million—"34 cities in search of a downtown"—where traffic congestion breeds a stubborn reluctance to travel. It must find ways to develop ongoing relationships with audiences beyond single events—not only relationships between the Symphony and its various cultural communities, but also among the cultural communities themselves. The rich ethnic diversity of the region is an asset for the Symphony, providing an endless supply of interesting material and meaningful engagement opportunities. Yet understanding and learning from these communities—not to mention developing their loyalty—is a formidable task and one Pacific Symphony is really just beginning. There are language barriers, different traditions of interaction, and unfamiliar networks for spreading news and information. Listening becomes a refined art.

The rich ethnic diversity of the region is an asset for the Symphony, providing an endless supply of interesting material and meaningful engagement opportunities

to boldly go: creating a new artistic leadership model



The Saint Paul Chamber Orchestra

Nicholas McGegan

BEGINNINGS

A Context for Innovation

The history of sibling rivalry between Minneapolis and Saint Paul goes back a long way. The saying goes that Minneapolis is a champagne town and Saint Paul is “a shot and a beer.” Indeed, Saint Paul began as “Pig’s Eye,” a lively fur trading post that sold whiskey to neighboring Fort Snelling, while Minneapolis was developed by Yankee capitalists as a planned community focused on industrial development. According to legend, the two cities arrested each other’s census takers in 1890 to ensure that one city did not outpace the other. The

University of Minnesota has two campuses—one in each city. There are two orchestras: the Minnesota Orchestra and The Saint Paul Chamber Orchestra (SPCO).

In 1915 Saint Paul built its stunning cathedral. Not to be outdone, Minneapolis added its own basilica in 1926. While the years have created mutual interests that have brought the Twin Cities closer together, they are still distinct in many ways. Saint Paul retains its village-like sensibility and a dedication to reclaiming its historic buildings. The landscape of Minneapolis is dotted with gregarious new architecture like Frank Gehry’s Weisman Art Museum and Jean Nouvel’s Guthrie Theater.

As a center for education, medicine, and industry, the Twin Cities offer a rich cultural life, including three major museums, forty professional theatres, three Broadway houses, and numerous galleries—in addition to the orchestras and other music organizations. A long history of philanthropy, generous pri-

vate and corporate foundations, and a commitment to culture and individual creativity make the region extremely friendly to artists. The Twin Cities have long been a magnet for individual artists who come seeking an affordable and comfortable place to live and make their work. At the same time, all this activity produces an incredibly competitive market relative to the population. In the Twin Cities, for example, there are twice as many orchestra concert tickets for sale *per capita* than in any other U.S. city.

The SPCO was founded in 1959 on three core values: artistic excellence, accessibility through performances in multiple community venues, and innovation in the performance of the repertoire not performed by symphony orchestras. Its early years brought significant growth artistically, but the orchestra lacked the concomitant financial structure to support its ambition. Goals of increasing budgets and programming, building a concert hall, and attracting star soloists were set and achieved, but at a high cost that included financial crises, internal conflicts, and division within the board. Defining success was difficult for the organization as there were no viable industry benchmarks or business metrics for chamber orchestras, forcing the SPCO to revert to metrics more applicable to full-sized symphony orchestras. Defining its own market and reconciling financial health with a commitment to the unique artistic values of a chamber orchestra posed serious challenges for the organization. Perhaps even more important was the challenge of distinguishing itself in the only market in the country with two full-time orchestras.

The SPCO has a history of renowned artistic collaborators. Founding Music Director Leopold Sipe (1959–71) was followed by Dennis Russell Davies (1972–78) and Pinchas Zukerman (1980–87). When Zukerman left, Managing Director Deborah Borda made the strategic decision to engage an Artistic Commission of three leaders who would share artistic leadership of the orchestra. Their reputations, she believed, would maintain the level of artistic recognition the orchestra needed despite the loss of Zukerman. From 1988–92 Christopher Hogwood served as director of music, Hugh Wolff as principal conductor, and John Adams as creative chair. A brave experiment, it did not work for a variety of reasons, not the least of which was the lack of clarity regarding decision-making, a lack of authority vested in the leadership team, and a lack of continuity after Borda's departure in 1989. In addition, the Artistic Commission was a response to a perceptual problem, rather than the outgrowth of a larger vision for the SPCO, and it was therefore not owned by the key stakeholders in the organization. In this context and amid a growing financial crisis, the SPCO returned to the traditional model of a single music director, appointing Hugh Wolff to the post in 1992. He served until 2000, and was followed by Andreas Delfs (2001–2004).

In 1992 Brent Assink became president of the SPCO, and he found the orchestra on the brink of death. Assink and key board leaders set out to repair an organization that was seriously broken, and the institution-building that took place over the next five years—including deficit elimination, board-building, a galvanizing

Radiothon led by Minnesota Public Radio, and balanced budgets—would position the SPCO for major artistic, cultural, and organizational change. When Bruce Coppock arrived as President in 2000, he would have a new charge.

The SPCO is a chamber orchestra and, like its home city, it is smaller in scale than its sibling in Minneapolis. It embodies the refinement, elegance, and charm of Saint Paul's historic streets and neighborhoods and the scrappy ingenuity and determination of its frontier history. It is not surprising that the SPCO's journey toward innovation led it to look inward—not outward toward shining edifices and bold architectural statements, but rather toward fundamental changes in the organization's culture, psychology, and core principles of artistic identity. At the same time, tradition runs deep in Saint Paul, and the idea of fundamental change challenged the city's conservative roots. SPCO board members from both cities stimulated the organization to think in new ways.

THE PATH TO INNOVATION

An Ensemble of Leaders

Identity Crisis

A 1970s poster that once hung in the men's room at the SPCO celebrated "Minnesota's Other Great Orchestra." Certainly living in the shadow of the older and larger Minnesota Orchestra did not help the SPCO. While its unique artistic role as the country's only full-time chamber orchestra should have helped it establish itself with clarity, energy, and force, the opposite was true. Instead, in everything except its repertoire, the orchestra thought and acted like its larger colleagues around the country. As Coppock says, "In terms of its structure, in terms of its attitudes, in terms of its labor contracts, in terms of its artistic leadership, in terms of its artistic sensibility, in terms of its hiring practices...in every dimension of its behavior [the SPCO] didn't differentiate itself at all."

In an industry that typically rushes to categorization, the SPCO just didn't belong. It was not a chamber music organization—though certainly it performed chamber music—and it was not a symphony orchestra. Yet defining the orchestra according to what it was not hardly raised it beyond the self-deprecating second-class citizenship reflected in the poster's language. As the new millennium approached, orchestra leaders were able to look beyond the increasingly healthy financial results produced under Assink and

see something even more dangerous than a lack of money: the most precipitous five-year audience decline in the industry, a frail artistic identity, the lack of a robust artistic plan, an aging orchestra and, at best, merely competent performances.

Competence was not enough. The SPCO board leadership wanted to go to the next level—to leap from being well-established nationally to being pre-eminent internationally. As it began its search for a new president and managing director, the organization was very specific: it was looking for someone who would embody the orchestra's institutional vision and intent rather than imposing them. It was looking for a leader who would take the organization on a journey to fulfill its urge for self-definition—a leader who would shape the SPCO's identity from the inside out, building a unique artistic platform and a vibrant culture that would be the SPCO's alone.

A New Leadership Team

When Bruce Coppock became SPCO president and managing director in 1999, he found the orchestra reasonably healthy financially, with six years of balanced budgets and no accumulated debt. In 2000, the orchestra completed a \$20 million endowment campaign led by then Chairman John Huss, a community banker and very active and generous philanthropist, who also is credited for developing a culture of 100 percent board financial participation in the organization. Together, the endowment and the emerging responsibility from within the board provided additional income to the orchestra and laid the groundwork for future planning. Andreas Delfs joined the orchestra as music director in mid-2000, and Lowell Noteboom, a prominent Minneapolis-based attorney (who also chaired the SPCO's 2000–2002 planning committee) was elected chairman in 2001.

Coppock—who would lead the orchestra for nine years—brought a strong combination of musical knowledge and executive management experience to the SPCO. A cellist and co-founder of the Boston Chamber Music Society, he had the musical chops and passion for the chamber orchestra and chamber music repertoire to win the confidence of musicians. His management experience, including positions at the Saint Louis Symphony, Carnegie Hall, and the League of American Orchestras earned him the trust of the board. Known as a renegade who was never comfortable with the status quo, he seemed the perfect fit for an orchestra seeking to re-imagine itself. The SPCO got the energy and leadership it was looking for—and more.

The Mellon Orchestra Forum: Nurturing the Pioneer Spirit

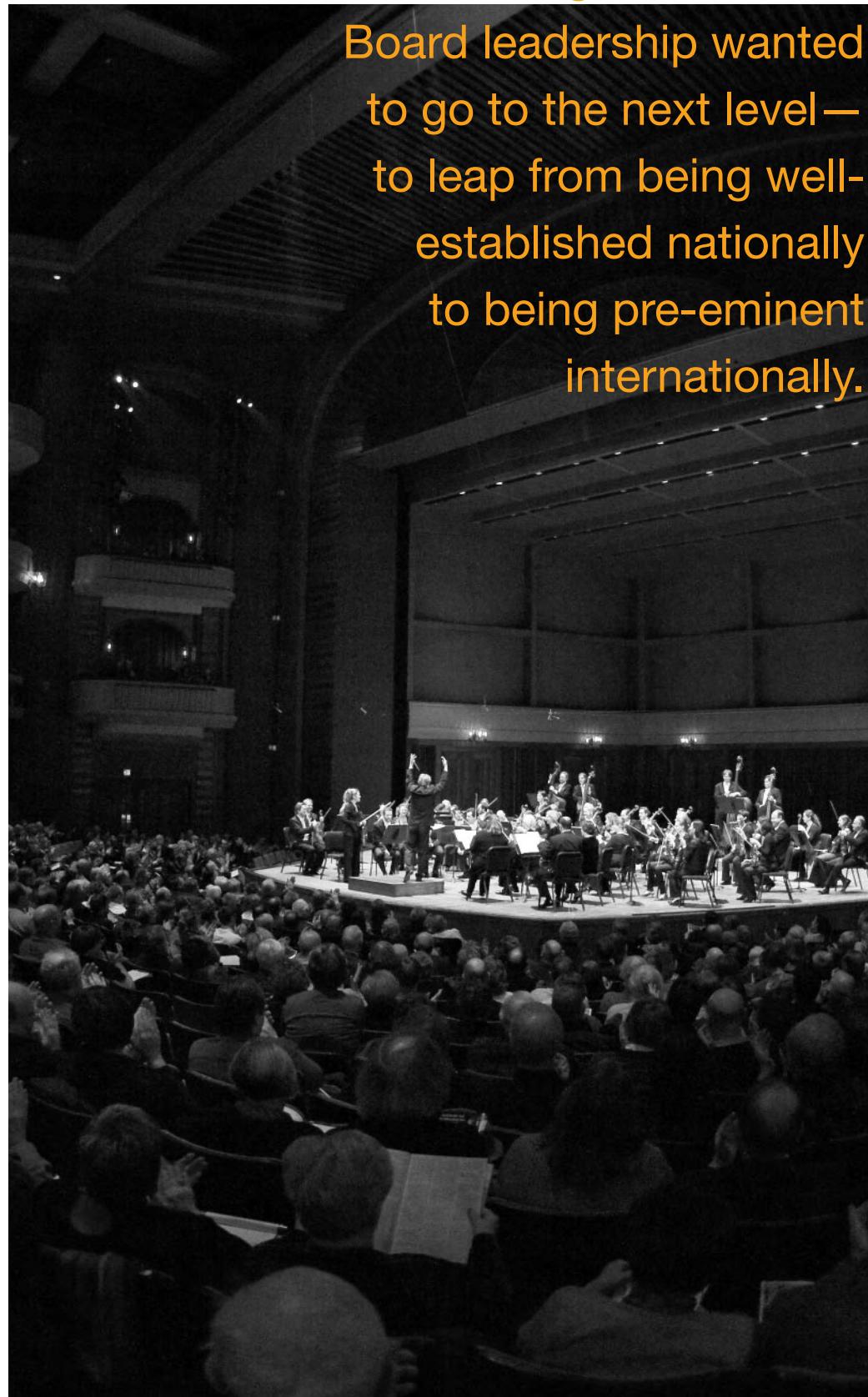
Coppock spent much of his first year on a listening tour of the organization. In early 2000, the Andrew W. Mellon Foundation invited the SPCO to apply for a grant through its national program for symphony orchestras, which aimed to help orchestras develop more robust (and unique) artistic identities. What Coppock learned from his conversations formed the basis of the orchestra's first position paper to the Foundation, and in the spring the SPCO was selected as one of 15 orchestras to receive funding. Along with receiving substantial financial support over ten years, the orchestra also would participate in Mellon's Orchestra Forum, a multi-faceted learning program designed to help orchestras develop and sustain innovative organizational practices that would enable them realize their artistic aspirations. The Forum, says Coppock, provided important leadership training as well as an understanding of organizational systems and culture that helped the orchestra as it moved through a complex and non-linear process to redefine itself.

Strategic Planning and Collective Bargaining: Strange Bedfellows?

In late 2000, with new leadership in place and the Mellon grant in hand, the SPCO began what was to be an 18-month strategic planning process, guided by a multi-constituent task force chaired by Noteboom. The task force sought broad input from musicians, staff, board, and members of the community. Two outside consultants brought additional expertise, structure, and insight to the process: Ronnie Brooks, director of the Institute for Renewing Community Leadership, and

Competence was not enough. The SPCO

Board leadership wanted to go to the next level—to leap from being well-established nationally to being pre-eminent internationally.



Comments were honest, direct, and sometimes harsh, but they were invaluable in crafting next steps. Developing trust took time. The progress was occasionally rough, but steady.

Tom Morris, then executive director of The Cleveland Orchestra. Orchestra leaders relied on Brooks's grassroots inclusion skills and Morris's conceptual thinking and framing skills to create an intentional clash of viewpoints that would shape and inform the planning process.

The process—which included 75 meetings—was carefully designed and expertly managed to create space for breakthrough thinking and visioning into the distant future, while at the same time considering specific constituent needs and positions. The strategic planning group engaged in vigorous and, at times, contentious debate, all the while working collaboratively to unearth common ground critical to rethink the orchestra's artistic profile, artistic leadership model, organizational culture, and facilities. The group kept coming back to the role of the SPCO as the only full-time chamber orchestra in the country. What would it take, they imagined, to truly live up to that role? What would it take to be widely recognized as "America's

Chamber Orchestra?" How would improving artistic quality help create a sustainable place for the SPCO in the community and the larger music world? Coppock credits the work of Jim Collins, author of *Built to Last* and *From Good to Great*, with helping establish the conceptual framework for the emerging institutional vision.

There was an enduring commitment among all involved in the planning process to work together, and the group established specific ground rules, including active listening, patience, focusing on problems rather than individuals, and tackling difficult, often uncomfortable issues. With the goal of developing trust and supporting honest conversations, the group gathered anonymous written feedback after its sessions to unearth conflicting viewpoints and unspoken views or concerns. The comments were honest, direct, and sometimes harsh, but they were invaluable in crafting next steps. Developing trust took time. The progress was occasionally rough, but steady.

The collaborative planning process was interrupted by labor negotiations in early 2002. While the planning group had hoped that the process would inform negotiations and allow the SPCO to make contractual changes that would enable its effective implementation, it was not to be. Musicians simply were not ready. The result was a new two-year contract and a commitment to try a new approach the next time around—one that would be less fractious and more attuned to institutional goals. Musicians, upon the recommendation of their attorney,

Susan Martin, came away from the process believing that they did not need an attorney for subsequent negotiations.

The strategic plan was adopted by the board in 2002, with a new vision for the SPCO "to provide innovative discovery and distinctive experience through the brilliant performance and vigorous advocacy of the chamber orchestra and chamber music repertoire." The plan defined the orchestra's artistic profile as "*what we play, with whom we play, where we play and how we play.*"

Although the SPCO had been unsuccessful in its first attempt at linking its plan to the collective bargaining process, it immediately began laying the groundwork for the future. As a first step, the orchestra formed a Venues Task Force charged with creating a long-term plan to meet the SPCO's facility needs: new performance locations, acoustical needs in existing venues, the historically vexing problem of rehearsal space, and the twin problems of appropriate space to build organizational cohesiveness and to introduce new programming. The task force concluded that a multiple-venue approach was an essential strategy for the SPCO to differentiate itself. This ended—at least at the strategic and philosophical level—the age-old question of whether the orchestra should perform all of its concerts in one centrally located venue.

Simultaneously, the orchestra was entering another contract renewal process. The change in language was critical as it signified to the orchestra a collaborative rather than a confrontational approach. It also suggested an ongoing and long-term process aimed at producing purposeful actions and at building cohesiveness within the organization as opposed to bargaining or negotiation. This time, the contract renewal process—facilitated by Paul Boulian, an experienced corporate organizational strategist and thinker, and Fred Zenone, a retired cellist of the National Symphony Orchestra and former chair of the International Conference of Symphony and Opera Musicians, and without attorneys on either side—did succeed in linking the musicians' contract with the organizational plan. It was not easy. At the very core was the controversial issue of artistic identity and the SPCO musicians' role in crafting it. Despite rigorous attempts to ensure clarity and build ownership throughout the contract renewal process, the four-year contract ratified in early 2003 passed by only a narrow margin. Deteriorating economic conditions throughout the

industry affected the SPCO as well, and the contract renewal team found it difficult to separate this external issue (and its payroll implications) from the need to move forward with the ambitious agenda articulated in the strategic plan. In the end, the contract ratification affirmed the orchestra's most fundamental building block for the future: removing significant responsibility from the music director and transferring it to musicians, including hiring and firing, auditions, and other non-podium responsibilities of the music director.

Ratification of the multi-year contract gave the SPCO some breathing room, and it set the stage for ongoing discussions of practical implementation. From 2004–2006 a Business Model Task Force and a Pricing Task Force—both cross-constituent—worked to flesh out the vision of the strategic

plan. Planning and visioning—and the contractual structure to enable them—were becoming inextricably linked in the SPCO psyche and culture. By managing the two processes simultaneously and by consciously creating experience and learning around the important intersection of planning and implementation, the SPCO took incremental and inter-related steps toward its goal of establishing a new—and fundamentally compatible—artistic identity and business model.

By 2006, much of the SPCO's 2002 plan had been achieved or had been made irrelevant. It was time to update the plan, and the SPCO embarked on a six-month inclusive process that involved numerous task forces and used the new artistic leadership structure to ensure musician involvement. Once again, however, there was dissension within the organization as factions within the orchestra argued over what the changes in the business model would mean for them and whether their new roles were appropriate to artistic decision-making. In Fall 2006, the SPCO presented the plan—including significant changes in musicians' responsibilities for artistic matters—to the orchestra for approval. The initial vote by musicians agreed to accept the plan “to the extent it was limited by the labor agreement.” This qualified endorsement—which never arose as an issue during the planning process—was rejected by the president and managing director and the board chair, and musicians were asked to vote the plan up or down. Unanimously, the musicians voted in favor of the plan. Strategic planning and contract renewal were now



SPCO Flautist Alicia McQuerrey

linked—in theory if not yet in organizational practice.

In late 2006, at the suggestion of musicians, the orchestra held four facilitated multi-constituent meetings to frame the issues for the upcoming contract renewal process. A new contract was approved in 2007. The contract included a number of ground-breaking changes, including a new media agreement and numerous artistically-based changes to rehearsal and scheduling practices to better suit the artistic needs of individual programs. Acknowledging the discomfort of musicians with some personnel issues, it also returned to management the full authority for musician demotions and dismissals, hiring and firing, and eliminated binding peer review by musicians of those decisions.

Barry's Barn

Some in the organization were disappointed when the SPCO chose to embrace a multiple-venue strategy, ruling out a central concert hall and the control, efficiency, and cohesiveness it would offer. Without a central facility, it was difficult to imagine how the orchestra could succeed in building the kind of interactive organizational culture its plans demanded. Barry Kempton—then vice president and general manager—suggested an approach that some British orchestras were taking: a center for everything except full chamber orchestra performances. Feasibility planning, however, indicated that costs for such a project would range from \$18–\$45 million (excluding land acquisition), and given the economic climate, the project seemed doomed.

In early 2003, however, appropriate space became available in the building where the SPCO had its offices, and the owner—enthralled with the idea of creating an SPCO Center (dubbed “Barry’s Barn” internally)—supported the vision with a combination of philanthropy and modest rent. Even so, Barry’s Barn was a tough sell when the SPCO was looking at a 20 percent reduction in expenses due to worsening financial conditions. After the project was fully designed and costed out, there was inadequate time for normal fundraising; in remarkable testament to their engagement, 23 board members signed personal guarantees of \$100,000 each to secure a bank loan for the Center. All this was accomplished in just one week, and in summer 2003, the SPCO committed to the project. Construction began in the fall, and the new SPCO Center opened the following year, giving the SPCO a much stronger organizational platform from which to design its programming and raise annual and endowment funds. In the end, the orchestra was able to raise funds for Barry’s Barn from new sources without having to divert precious operating resources, and it repaid its loan fully one year early.

The SPCO Center is just one example of how the organization was changing and how well its plan was working. Rather than shelving the project as too controversial or difficult during tough economic times (and in the midst of concessionary contract renewal discussions), the orchestra was able to move forward simultaneously on several fronts. Coppock says, “The



relationship between thoughtful strategic planning and the ability of the board to move quickly was critical to building the case for [SPCO Center]. Absent the plan, this never would have happened.”

Innovation in Action: The Artistic Leadership Model

The SPCO’s artistic leadership model is based on five principles:

- ➔ Musicians should be central to the orchestra’s artistic vision and profile.
- ➔ If charged with greater responsibility, musicians will rise to the occasion.
- ➔ A collaborative artistic leadership model will have a positive effect on artistic quality and musician job satisfaction.
- ➔ A chamber orchestra is unique and different from a symphony orchestra.
- ➔ No music director has the artistic strength to cover the vast repertoire the chamber orchestra and audience demand.

The essence of the model is the transfer of significant (though not all) artistic decision-making authority to musicians, vesting them with control



SPCO Violinist Nina Tso-Ning Fan

over their artistic future and responsibility for continued improvements in the SPCO's artistic quality. Says one musician, "We together pick the conductors. We together pick the soloists. We together decide the fate for the organization in many ways. When the organization does anything of gravity, there are musicians involved in it. We are not behind this giant wall while the other guys are taking care of everything."

The Role of Musicians

Musicians now have a robust, powerful, and central voice in what the orchestra plays (programming), with whom it plays (soloists, conductors, and artistic partners), where it plays (venue), and how it plays (quality). In this way, musicians strategically take the lead in establishing the SPCO's artistic profile and in defining its artistic life. Together with management, musicians balance a number of strategies in

any given season: programming musician-led concerts that provide a broad platform for individual musicians to take responsibility for a performance; providing sufficient rehearsal time in response to program complexity and increased expectations; focusing on core SPCO repertoire, including Baroque, Classical repertoire, smaller works, and reductions of the Romantic period, early 20th century masterpieces, and contemporary works; demonstrating a commitment to new work through festivals, commissioning, and novel concert experiences; and fulfilling the orchestra's commitment to chamber music.

Musicians do not, however, have the only voice in determining artistic matters. They share this responsibility with management. The SPCO makes its artistic decisions through two formal committees composed of three musicians and two staff members each. The Artistic Vision Committee is responsible for programming, selection of visiting artists and artistic partners, tours, and recording activities. The Artistic Personnel Committee oversees and manages the audition process, musician tenure reviews, leaves of absence, seating and rotation, and other personnel matters. The committees are designed as a collaboration between staff and musicians, and impasses are resolved by a "super majority vote," forcing two musicians to join with staff or one staff member to agree with three musicians in order to arrive at a decision.

Artistic Partners

Instead of a music director, the SPCO engages a rotating group of Artistic Partners. Similar to the leadership models of the Academy of St. Martin in the Fields, the Chamber Orchestra

of Europe, the Vienna Philharmonic, and Carnegie Hall's *Perspectives* programs, the SPCO model creates a way for the orchestra to collaborate with exceptional artists who act as concert leaders. Artistic partners are in residence for three to four weeks annually. Instrumentalists generally serve for three years and conductors for six. Artistic Partners design their own programs (with final approval of the SPCO), but they are constrained from engaging in broader artistic issues, except when giving feedback in performance-issue cases.

The SPCO selects its Artistic Partners based on some combination of a history of artistic success with the orchestra, their passion for the chamber orchestra repertoire, their creative

"We together pick the conductors. We together pick the soloists. We together decide the fate for the organization in many ways."

rapport with SPCO musicians, and their range of professional expertise. The SPCO is disciplined, but flexible, in its selection process, leaving room for the unimagined and the unexpected while keeping in mind the orchestra's artistic ambitions. The SPCO's original four Artistic Partners, who were appointed in 2004, included conductor Nicholas McGegan, violinist Joshua Bell, oboist Douglas Boyd, and composer Stephen Prutsman. Roberto Abbado joined the orchestra in 2005 and pianist Pierre-Laurent Aimard in 2006. Current partners include conductors Roberto Abbado and Christian Zacharias, soprano Dawn Upshaw, and Douglas Boyd. The SPCO recently announced two new future partners, violinist Thomas Zehetmair and conductor Edo de Waart. There is great potential to expand collaborations to include dancers, actors, videographers, and other artists whose perspectives could change the SPCO's artistic palette dramatically.

Noteboom describes his growing enthusiasm for the new system, saying "As we started down the road, nobody was scratching their head as much as I was. I had never lived with this kind of model before, and I wondered. I was intrigued by it intellectually and it felt pretty interesting, but I didn't have a clue. As each Artistic Partner came on the scene and spent time with us, it just became clearer and clearer that this was a really good thing. However, I don't think that would have been true if it hadn't been coupled with some other things we were doing."

Certainly, combined with the deepening involvement of musicians, the Artistic Partnership model appears to be working well. The arrangement has numerous advantages. It gives

the SPCO access to a pool of artists that would be unavailable in any long-term traditional leadership capacity. Collectively, the SPCO's Artistic Partners are actually in residence more weeks during the year than a traditional music director would be. The system also gives Artistic Partners great latitude to experiment, allowing them to stretch and take risks. Most important, perhaps, is what Artistic Partners do for the artistic profile of the SPCO. Carefully selected to fulfill one of the orchestra's primary strategic programming goals, partners bring variety, depth, and creativity into the organization on a revolving and cumulative basis, creating a well-rounded artistic profile for the orchestra. As years pass and the orchestra's roster of collaborators grows, the breadth of the orchestra's experience brings new power to its playing, lifting the SPCO beyond competence and toward its self-defined purpose of "distinctive experience and brilliant performance."

Developing Readiness: Key Enablers of Change

A variety of conditions created an opportunity for the SPCO to re-imagine itself. First of all, the organization wanted to change, though it didn't know at the time just what that would mean. The fact that the SPCO is a chamber orchestra allowed the organization a maneuverability that doesn't come easily in larger organizations. Musicians with long tenure in the orchestra—who cared deeply and who had a strong vested interest in the SPCO's survival and growth—brought a knowledge of history and a sense of gravity to the process. The intimacy that was possible given the orchestra's size and the nature of its community created a sense of family and opened channels of communication that ultimately would be critical to the process. Conditions in the industry itself called for new ways of doing business and offered a challenge to the SPCO. Could a chamber orchestra be the one that would break the mold of conventional practice and show the

Pierre-Laurent Aimard



The fact that the SPCO is a chamber orchestra allowed the organization a maneuverability that doesn't come easily in larger organizations

way to renewed artistic vitality? These conditions, together with a number of enabling factors, contributed to the SPCO's success.

New Governance Practices and a Re-engaged, Committed Board

The SPCO board was a constant and productive partner with management and musicians throughout the transformation process. Continuity, vigorous engagement, commitment, and generosity of time, intellect, and resources were critical to achieving organizational goals. Increasing board effectiveness (attendance, size and quality of membership, teamwork, and annual giving) alongside building institutional and artistic capacity made sure that what mattered was always before the board and that a critical mass of people in the organization was working toward the same ends.

The SPCO implemented a well-conceived strategy aimed at building board effectiveness during this period. It eliminated term limits to encourage long-term ownership of actions

and decisions. It followed a rigorous self-evaluation process and governance committee review. To overcome disenfranchisement and encourage responsibility, it eliminated the power of the Executive Committee and transferred decision-making to the entire board. It added many additional women to enhance agile thinking and break down traditional networks. It insisted that the board engage in the critical issues of the orchestra, saying yes to increased financial contributions, more meetings, and additional work. One board member says, "The other boards I sit on fret with governance problems. This orchestra's leadership and the board had a very clear vision. It was very clear to everyone what the plan was and that they were sticking to the plan. The goals were communicated and everyone was singing from the same book. It was the best execution I have ever seen."

Visionary, Determined, and Disciplined Leaders

As a leader, Coppock embodied a rare blend of leadership capabilities and personal characteristics that matched the SPCO's call for someone to take the orchestra to the next level. While he says that he did not know where the orchestra should go "for quite some time," he was driven by the curiosity to find out. Members of the SPCO organization cite his thorough knowledge of the field, strong vision, capacity for continual learning, persistence, and personal courage as fundamental to his success in the Twin Cities.

Throughout his tenure, Coppock continued to demonstrate behavior typical of an entrepreneurial leader: unusual confidence, an almost unrelenting tendency to challenge assumptions, a high tolerance for risk, an insistence on big vision, and a passionate dedication to the orchestra. There was always "a bit of chaos" around him, and he wasn't patient by nature. "When Bruce has a big idea, he just sort of skips a lot of details," says one musician. But he learned to slow down, to wait for others and to build inclusion. Says one board member, "With his energy, foresight, and musical knowledge, Bruce was the ideal guy. He can get agreement on where he wants to go, not because he rams it through but because he's inspirational. He's logical; he takes you through steps of why this is the way it should be. A true leader." The board served as a catalyst for Coppock's ideas and actions. It tested his thinking, challenged him, mentored him, and helped him grow as a leader.

Coppock, who describes himself as a "bit of a contrarian" and a "learner," had a strong companion leader in Lowell Noteboom. The mentoring partnership between Coppock and Noteboom was perhaps unprecedented in the field. It was built on mutual respect, intellectual rigor, and inspiration, a love of music, and a passion for making a difference. As Noteboom explains, Coppock is "full of ideas. He's full of energy.... [he] would provide the energy, push the organization, and push me. And

I would counsel tolerance. I think I helped him learn how to bring people along collaboratively. We were thought partners.” Coppock adds, “Lowell and I debated a lot. We wouldn’t fight; we would just discuss everything—pricing, artistic leadership structure. He made me much better because he forced me to think things through from a variety of perspectives.” It is no small credit to Coppock that he sought Noteboom’s guidance. Knowing he would have to “do things that would guarantee that (he) would never be hired by another orchestra,” Coppock told Noteboom, “You have to help me manage this risk by giving me a long-term contract and you have to insulate me from the slings and arrows.”

Noteboom and Coppock worked together to assemble a management team that provided balance for the sometimes free-wheeling Coppock, who, according to Noteboom, was “always going 150 miles per hour when the staff [was] trying to catch its breath from going 85.” While it was clear that Coppock’s enthusiasm was captivating, the staff “sometimes felt like they were drinking from a fire hose.” Aware of his whirlwind tendencies, Coppock enrolled himself in professional

development work, worked with an executive coach, and hired highly disciplined and task-oriented senior staff to balance his own inclinations.

Musician leaders emerged as well, and their determination and persistence were critical to advancing the process methodically over time. They helped manage the complex dynamics within the orchestra, sometimes at high personal costs. The multi-constituent team of leaders—all working toward a single goal—kept the process focused. “A rich combination of vision and discipline was the key,” says one staff member. “My experience is that if you have vision but no discipline you never get any place. But if you have both you can really get stuff done. Vision and discipline together allowed us to do audacious things that worked. The change hasn’t been easy and the organization has been bursting at the seams with change. Without the discipline, we could have gone off the rails.”

Expert Help

The SPCO turned regularly to facilitators to help with planning and contract renewal as a means of strengthening its capacity and building cooperation and collaboration. The orchestra also took advantage of the diverse learning opportunities offered by the Orchestra Forum to test its ideas, refine its thinking, and gain insight from colleagues and Forum faculty.

Over the last decade, board, musicians, and staff purposefully blurred the boundaries that traditionally separated them while still retaining their distinct roles and contributing their individual expertise to the model’s design process

Vision, Quality and Inclusion

Inclusion, collaboration, and a single-minded focus on the long-term vision were key underpinnings of the successful completion of the immense and complex changes which emanated from the SPCO’s strategic plan. Nothing, however, would have happened had it not been for the involvement of musicians who participated in every important decision. Over the last decade, board, musicians, and staff purposefully blurred the boundaries that traditionally separated them while still retaining their distinct roles and contributing their individual expertise to the model’s design process. Breaking down these silos helped create positive energy, generate creative ideas, and respond to challenges over time. Leaders took time to recognize and celebrate the participation and contributions of individuals across the organization. Noteboom says, “The strategy, while it was inspired and informed by Bruce and perhaps at some point by me, in many ways has its genius in the fact that the development of it was so inclusively done. So at the end everybody could look at the result and nobody could say, ‘Where did that come from?’”

The changes at the SPCO were motivated by the desire to do things better—from managing the orchestra’s finances, to improving board engagement, to increasing audiences. But most of all, they were inspired by a desire to be artistically better. Artistic excellence is generally an unchallenged given in orchestras, although that is no longer so at the SPCO. It



Former SPCO President and Managing Director Bruce Coppock

was not easy to question the quality of the orchestra's concerts, but doing so was critical to beginning the conversations about increased musician ownership of the SPCO's artistic goals. Were the orchestra's concerts really good enough to rank it as one of the world's best chamber orchestras? Was it possible that audiences were declining for reasons of quality, not money or time constraints? What were the orchestra's artistic weaknesses, and how could they be fixed? What role did musicians need to play in this analysis, and how should they be responsible in the future for improving the quality of individual playing and of ensemble performance? Shouldn't musicians actively pay attention to musical details, listen to performances, and debrief after concerts in order to engage in critical discussions about artistic goals and improvements?

Efficient Systems and Processes

Successful implementation of the new artistic model was in part a function of important changes to the organization's systems and processes. Musician job descriptions are regularly reviewed and adjusted to account for changing orchestra demographics and to take advantage of emerging skills and talents. The orchestra offers formal

and informal learning opportunities to facilitate self-improvement across the organization, including help for musicians to effectively execute the new vision. Noteboom made certain that there were multiple opportunities for performance feedback among staff and board. Staff received formal performance reviews, and the president was given multi-constituent reviews that provided feedback from staff, board, and musicians. Board members participate in regular self-assessment and review by the governance committee, and the chairman is encouraged to engage in a voluntary review process as well.

The board, musicians and staff work jointly on decisions from strategic planning to concert dress. Despite the occasional frustration with the time required for multi-constituent decision-making, SPCO constituents consider the process superior to a top-down approach. The process creates ownership and a solid platform for action. The board intentionally and purposefully engages musicians in standing committees and task forces of the board as a means of informing decisions and building relationships among musicians and trustees.

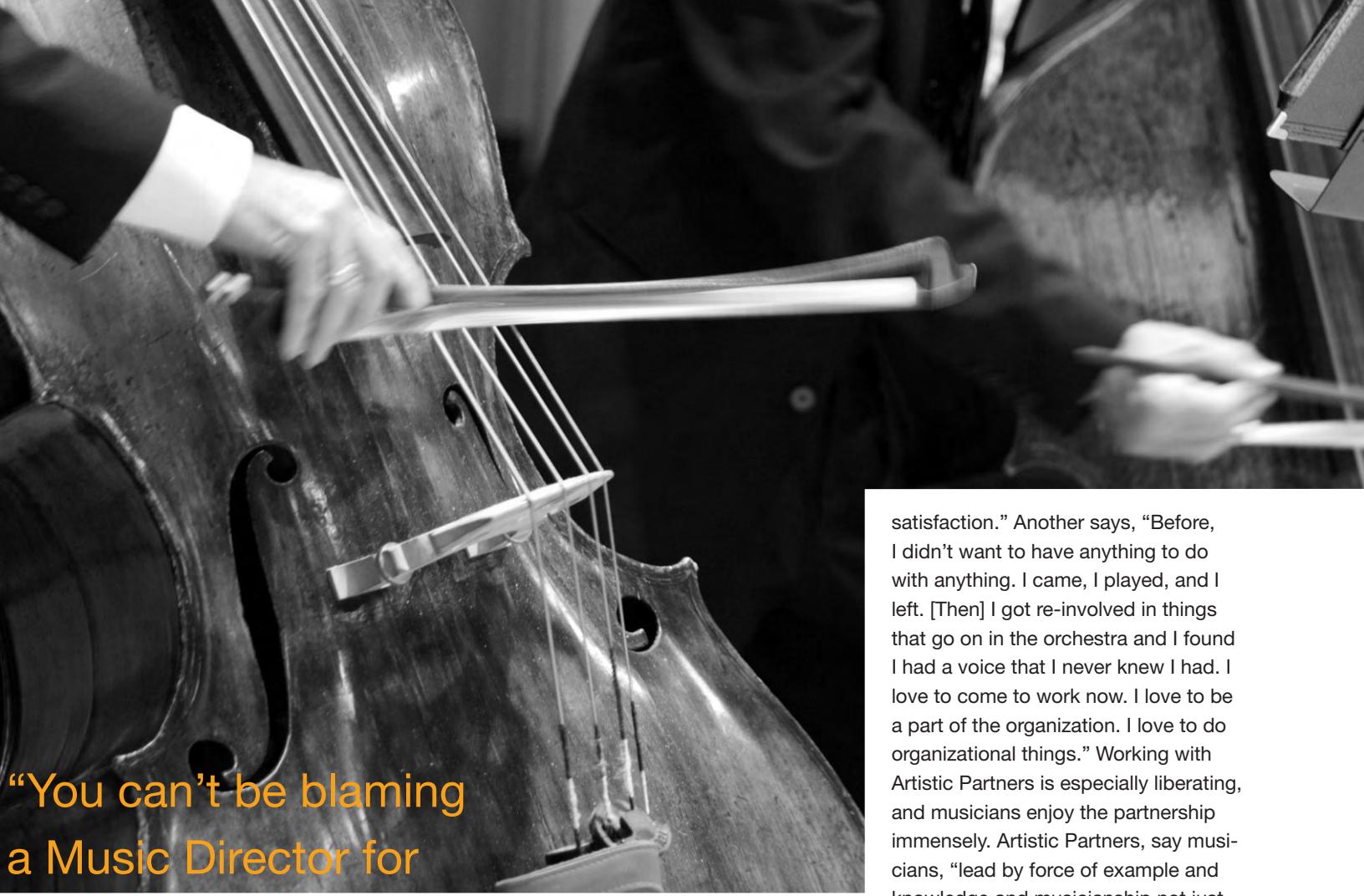
Undoubtedly one of the biggest structural changes has been in the SPCO's musician recruitment process, which now is geared toward selecting the best fit for the orchestra's artistic objectives, profile, and culture. The SPCO carefully screens candidates through a series of activities in order to assess the musical curiosity, initiative, training, and experience they would bring to their work in the organization. Following final auditions, the orches-

tra invites finalists for a two-week trial, during which they perform in the orchestra, play a recital, and perform chamber music with SPCO principals. Being accepted into the SPCO requires an 80 percent majority vote of the audition committee, and once hired, new musicians undergo a demanding provisional three-year pre-tenure period to ensure compatibility.

THREE STEPS FORWARD

Impact and Learning

The impact of the SPCO's new artistic model is visible in many ways. The organization reports that its culture has changed dramatically. In moving from hierarchy to partnership, the SPCO has become more entrepreneurial. Today the orchestra embraces a new set of cultural ideals: innovation, risk-taking, professionalism, collaboration, and intimacy. A culture of "good enough" has been replaced by a new standard of execution, excellence, and continual improvement, both on stage and off. A reward system based on high performance has reduced a debilitating sense of entitlement. A desire for continual learning and self-improvement has replaced individual and organizational complacency. New ideas are encouraged and welcomed, and everyone shares authority and accountability. "As the organization has



**“You can’t be blaming
a Music Director for
how the orchestra
sounds. We’re the
ones performing and
we’re the ones that
have the responsibility
for how it sounds.”**

become more successful, it’s become more self-confident,” says a staff member. “And the more self-confident it is, the more successful it is.”

The SPCO musicians report that the changes have affected their lives directly. They say that initial suspicion and controversy has turned into “85 percent of people who like this model.” One musician says, “I haven’t heard anyone wishing for a return to any other model.” The model has had a profound effect on the musicians’ self-image, improving their motivation and job satisfaction. “The model is huge for me,” says one musician. “After being a section player for 15 years with no voice whatsoever, having a place where my voice is heard is huge. It’s really changed, immensely, my job

satisfaction.” Another says, “Before, I didn’t want to have anything to do with anything. I came, I played, and I left. [Then] I got re-involved in things that go on in the orchestra and I found I had a voice that I never knew I had. I love to come to work now. I love to be a part of the organization. I love to do organizational things.” Working with Artistic Partners is especially liberating, and musicians enjoy the partnership immensely. Artistic Partners, say musicians, “lead by force of example and knowledge and musicianship not just because they happen to be standing on the podium.”

The increased commitment and involvement of musicians, as well as the Artistic Partners model, have improved the artistic quality of performances, changed the SPCO’s artistic profile, and increased both the size and enthusiasm of audiences. “To me the level of playing is way up,” says one musician. “It’s hard to describe. In my mind it’s because people can’t be lackadaisical. It’s up to us. You can’t be blaming a music director for how the orchestra sounds. We’re the ones performing and we’re the ones that have the responsibility for how it sounds.” Working with Artistic Partners has increased the diversity of the SPCO’s repertoire and brought the orchestra greater recognition. A board member says, “You can see the results when you go to concerts,” and a musician reports that concerts are sold out

because “our regular concertgoers notice” the improvements in quality. Artistic Partners agree, saying that there has been “a revolutionary sea change” in the spirit of the orchestra. “The strides, not just the commitment but [also] the quality of music-making have been not just subtle but an unbelievable leap in how the orchestra plays,” says one Artistic Partner. “I think it has a lot to do with the new structure.”

Although there is a serious lack of metrics to assess the success of innovation in orchestras, the SPCO cites measurable progress that it believes is linked directly to its new model, including a larger and more diverse audience base (up by 50 percent), highly talented musicians, and Artistic Partners joining the orchestra, a stronger and more generous board, highly talented staff, scores of volunteers, balanced budgets for 14 of 15 years with no accumulated debt, and an endowment that has increased from approximately \$20 million to more than \$40 million over the past decade, placing it in the top quartile of major U.S. orchestras (computed as a multiple of operating expense budget).

The SPCO worked hard during its journey to capture learning for the field, and it reports the following insights:

- ➔ Leaders must have strong and clear vision, and visioning far into the future stimulates imagination and unleashes creativity.
- ➔ People support what they help to build. It is important to translate vision, mandate, and focus into meaningful work that engages all constituents.

- ➔ Diversity of ideas enriches process and outcomes. An inclusive process builds ownership and yields lasting results. Inflexible leaders with narrow perspectives suppress innovation, while open-minded leaders who advocate and enforce inclusion and multiple perspectives boost it.
- ➔ Innovation requires intellectual capacity. Recognizing, valuing, and mobilizing intellectual capacity from inside and outside the organization provides a critical foundation for producing meaningful and sustainable innovation.
- ➔ Innovation also requires discipline, patience, space for creative thinking, reinforcing reward mechanisms, and time.
- ➔ The board can be a critical enabler of innovation by advocating for innovation as something the organization must do and by engaging forcefully in the work of innovation, not just by overseeing it.
- ➔ Musician empowerment goes a long way. The capacity of musicians to make choices and to transform those choices into desired actions and outcomes increases through active engagement. Having decision-making power increases job satisfaction and commitment to the organization.
- ➔ Musicians need more than artistic skills to fully participate in the orchestra’s life. The organization must create opportunities for skill-building.
- ➔ Organizational systems, processes, and culture must evolve to enable innovation. Understanding which systems and processes enable innovation and developing a culture that values innovation are key factors in producing sustainable success.
- ➔ Continuity of vision is critical, and leadership continuity during any change process is just as critical. Recruitment of new leaders must occur in the context of the organization’s vision. Because musicians carry the greatest institutional memory, their participation and validation are essential to progress and sustainability.

THE CONTINUING JOURNEY

Future Plans and Aspirations

Today, the freedom to choose is very important at the SPCO. “We were stuck in the old model for so long. Now everything has opened up,” says one musician. Getting there, however, was often a “thorny” process, and the journey still continues. Musicians admit to having been “green” and “pretty scared” at the outset. Now they have new competencies, and they are seeing the results of their growing

influence and leadership. Staff were afraid of “too much vision,” but they have settled into a new way of working and an enthusiasm for innovation. “Why innovate? Innovate to what end?” says one staff member. “What goes awry is the not knowing to what end. We’re innovating to make ourselves sustainable.”

Some things have been easier than others. Musicians, in particular, have had to make big adjustments. They are still learning what practices and skills are necessary and most efficient in exercising their new authority. Their professional training does not include developing the institutional skills required for the complex leadership functions at the SPCO, and they are learning on the job, sometimes in painful ways. While communication, feedback, and artistic give-and-take are open and constructive during rehearsals, it is excruciating for musicians to “talk to someone about a specific ongoing problem without them feeling they might lose their job.” Professional improvement and dismissal decisions have proven especially difficult for musicians, and the model has been altered to relieve them of this responsibility. Hiring is easy, but dealing with inadequate performance and dismissal is not, and the musicians have been unable to fulfill their original expectations in this area. “The social consequences were just too high,” says Coppock. A musician says, “All of us have learned very specific skills to

play our instruments. There is a whole other set of skills like people skills and those are sometimes off limits to talk about. But I think it’s getting better.”

Learning how to do difficult things will be central to building increased capacity at the SPCO. As the orchestra moves ahead, it will focus on enabling organizational effectiveness: investing in developing the skills and leadership potential of people throughout the organization, establishing effective processes to facilitate musician feedback, clarifying the process for bringing on Artistic Partners and for recognizing their contributions when their relationship with the orchestra ends, setting up learning systems that are compatible with musicians’ learning styles, and building better communication skills across constituencies.

In part, the SPCO succeeded in its process because leaders—notably Coppock and Noteboom—committed to seeing it through. The challenge is staying the course, continuing to learn, and addressing yet unfulfilled vision, even following transitions in leadership. Sarah Lutman, formerly senior vice president of content and media for Minnesota Public Radio/American Public Media, became president and managing director of the SPCO in December 2008. Erwin A. Kelen has taken over from Noteboom as chairman of the board. Both are committed to continuing the journey started by their predecessors.

The SPCO’s journey was full of risk. Leaders throughout the organization who stepped up to challenge conventional practice and push boundaries

put themselves in the line of fire. Assuming that musicians would be sufficiently mobilized to participate in planning the orchestra’s artistic future was a risky proposition. Believing that the SPCO could succeed in nurturing the kind of long-term relationships with distinguished artists that would



The challenge is staying the course, continuing to learn, and addressing yet unfulfilled vision, even following transitions in leadership

raise the orchestra's profile was a leap of faith. Certainly, transferring artistic decision-making to musicians who had no experience in this leadership role was an act of courage. But it all seems to be working. A decade ago, the SPCO declared who it wanted to be and set out to establish a clear place for itself in the world. In 2009, in celebration of its 50th anniversary,

the SPCO hosted an International Chamber Orchestra Festival, featuring the Chamber Orchestra of Europe, the London Sinfonietta, the Orchestra of the Age of Enlightenment, and Philharmonia Baroque. The festival placed the SPCO in the company of the world's finest chamber orchestras and demonstrated to the Twin Cities just where the SPCO belonged.



SPCO Violinist Daria Adams

Atlanta Symphony Orchestra War Room



Atlanta Symphony Orchestra

from silos to synergy: building a collaborative organizational culture

BEGINNINGS

A Context for Innovation

Atlanta is a fast-growing transient city with a population of five million. Despite its ever-changing social, ethnic, and economic landscape, the city's historic roots run deep. Southern traditions, well-established and cherished by old-timers, do not bend easily to accommodate the unfamiliar rituals, behaviors or interests of newcomers. Even legendary conductor Robert Shaw was criticized for his emphasis on contemporary music, and the board of the Atlanta Symphony Orchestra asked him to resign just five years into his promising tenure as music director. Thanks to overwhelming support from the public, Shaw stayed in his job, but it was clear that changing things in Atlanta would be an uphill battle.

How then, did the Atlanta Symphony Orchestra (ASO) come to find itself under the leadership of two visionary and innovative leaders—Robert Spano and Allison Vulgamore—who were dedicated to trying new approaches, to creating novel programming that enables audiences to experience music in unexpected ways, and, as Vulgamore says, to promoting an artistic agenda that makes room for plenty of “new stuff?” Certainly, the ASO’s history and Shaw’s particular legacy cannot be underestimated. Shaw joined the orchestra as music director in 1967, serving in this post until 1988, when he became music director emeritus until his death in 1999. Despite his early conflict with the board, Shaw neither gave up on his artistic ambition nor gave in on his dedication to new ideas and repertoire. During his tenure, the ASO offered musicians their first year-round contract, added

summer programming, and formed the Atlanta Symphony Orchestra Chorus of 200 voices. Shaw also formed the Atlanta Symphony Orchestra Chamber Chorus, a select group of 60 voices that further enhanced the orchestra's influence and programming. Under his leadership, the ASO and Chorus made national debuts on both radio and television, toured internationally, performed at Carnegie Hall and the Kennedy Center, and made numerous acclaimed recordings on the Telarc label. The ASO has produced a discography of more than 100 recordings and won an impressive 26 Grammy Awards.

The ASO remains a youthful orchestra in a youthful city. Established in 1945 as the Atlanta Youth Symphony under the auspices of the Atlanta Music Club, the orchestra grew from a youth ensemble to a respected regional orchestra under the artistic guidance of Henry Sopkin who led the orchestra for two decades. By 1947, the fledgling group had become the ASO, and as the Symphony Guild became more active in fundraising and selling tickets, the orchestra's budget tripled. It expanded its repertoire, increased programs for young people, and brought top-flight soloists such as Glenn Gould and Isaac Stern to Atlanta. In 1964, the ASO was a founding member of the Atlanta Arts Alliance, the arts organization that has evolved into the Woodruff Arts Center.

Today, the ASO is a large, complex organization with nearly 200 employees, 15,000 donors and subscribers, 350 volunteer members of the youth orchestra and chorus, several hundred volunteers of the Atlanta Symphony Associates, and a governing and honorary board of nearly 100 members. Its current operating budget is \$45.6 million. The ASO is a division of the Robert W. Woodruff Arts Center. As one of four operating divisions of the Center, the ASO has its own board of directors and management team.

Yoel Levi became the ASO's music director in 1988 following Shaw's retirement. In 1994–95, the ASO marked its 50th anniversary, which it celebrated with nationwide TV broadcasts and a successful Northeast tour that culminated in New York City. In the summer of 1996, performances by the ASO and Chorus in the Olympic Arts Festival and the Opening Ceremony of the Centennial Olympic Games drew an international audience of over 3.5 million people. The Atlanta Symphony Youth Orchestra gave two concerts in the Olympic Arts Festival and anchored the Closing Ceremony.

Despite its highly respected artistic legacy, celebrated success, the stability of its leadership under Robert Shaw, and its recognition as an innovator in the performance of orchestral/choral music, the ASO found itself struggling with a series of potentially debilitating circumstances in the 1990s. When Allison Vulgamore joined the ASO as president and managing director in 1993 (she received the title

of president and CEO in 2008), serious troubles were already emerging, and the orchestra spent much of the decade in turmoil. Bitter relationships with musicians, the death of beloved father figure Robert Shaw in 1999, Yoel Levi's controversial departure in 2000, tortuous relations among orchestra constituents over his departure, and an accumulated deficit of \$4 million threatened the ASO's future. Morale throughout the organization was dangerously low, and Vulgamore and the board set their sights on turning the organization around. The orchestra had transformed itself before under Sopkin and Shaw, and it would do so again.

Despite its highly respected artistic legacy... the ASO found itself struggling with a series of potentially debilitating circumstances in the 1990s

THE PATH TO INNOVATION

Starting Over at the Beginning

Tough Terrain, New Leadership, and Leveraged Opportunities

The cultural terrain Vulgamore encountered when she arrived at the ASO in 1993 was treacherous. Things were clearly “a mess.” The board and musicians had been locked in an 18-month stalemate with an unsigned labor agreement and failed negotiations. Three years later, with financial crisis looming, the musicians went on strike for ten weeks. Constituencies were

deeply alienated and isolated, and frustration and bitterness characterized every part of the organization. These problems, Vulgamore believed, grew from a fundamental failure of the organizational culture to support shared vision and values and to engage all constituents in thinking strategically about the orchestra’s artistic future.

Vulgmore maintained that solving the inherent cultural problem must be the critical first step in solving related artistic and financial problems. A healthy internal culture—one that enabled participation, fostered communication, and promoted shared decision-making—would give the orchestra the leverage it needed to attract strong artistic leadership, strengthen the

orchestra’s programming and artistic identity, improve staff morale, stimulate increased donor support, and define new strategies for community engagement.

To elevate morale and to galvanize the organization out of deep crisis, Vulgamore advocated an open and inclusive conversation about what the future should and could look like. These conversations—in which everyone participated as equals—sought to eliminate the ASO’s behavioral silos in favor of renewed alignment around mutual goals. In all, the ASO gathered nearly 200 people—board, staff, chorus members and musicians—to work together on developing a shared platform that would guide all future decisions of the organization, including the design of its new concert hall and the selection of a new music director.

The initial Task Force Phase of the ASO’s cultural evolution thus began. It began without anyone knowing or assuming where it might lead, but with the sense that it would be lasting and meaningful for the organization—a change, says Vulgamore, “for years and years to come.” In short, it was understood by all participants to be “large and important work” that would solve fundamental problems and bring greater capacity to the



ASO Music Director Robert Spano and former President and CEO Allison Vulgamore discuss new works by the Atlanta School of Composers

Organizational retreats designed to discuss and explore challenges and issues eventually began to create ownership across constituencies

organization. While Vulgamore carefully maintained and reinforced the principles of shared communication, the process she designed was organic, allowing for a proper mix of hands-on principle-based guidance and hands-off ideological stewardship. The topics of cross-constituent work evolved over time—from discussions of culture, confidence and harmony to more specific engagement around developing a long-range plan, to dialogue around how to execute the plan, and onward to the next issue and the next—allowing the vision to take shape incrementally while the process of ownership-based decision-making became increasingly more practiced and established. As it became more natural for cross-constituent groups to work together on solving problems, initial project-based task forces became the institutional behaviors that ASO members now describe as “how we live and breathe.”

One staff member credits Vulgamore with having saved the organization: “The institution almost came apart. Allison put it back together by collaborating. She created everything by consensus.” Vulgamore does not claim purposeful design, though she does acknowledge calculated vigilance and discipline. The tipping points, she says, may seem logical in retrospect, but they “came to me as we went along.”

What were the defining moments for the ASO? Certainly, the institutional leader’s insistence on having everyone at the table to explore vision and mission helped heal personal wounds and eliminate the bitter schisms among the orchestra’s constituents. But there were deep financial wounds as well, and it took a collaborative effort to stabilize the deteriorating financial situation. An extraordinary effort by all constituents—aided by an anonymous contribution—put the orchestra on sound footing once again. Organizational retreats designed to discuss and explore challenges and issues eventually began to create ownership across constituencies. What began as panels and break-out sessions turned quickly into constituent-driven conversations that almost immediately expanded the quality of thinking. “We realized,” said one ASO member, “that we didn’t need a panel. We were the break-out session, and we had to be the ones conversing on topics.”

To support this growing enthusiasm and engagement, ASO leaders launched a series of major research and evaluation initiatives in the late 1990s that, coupled with focused task forces, laid the groundwork for what the orchestra calls its “cross-constituent governance model.” One of the tools created through this process was an in-depth financial planning model

used to consider the need and scope of an eventual endowment campaign. The resulting campaign, *In Concert for a New Century*, raised \$40 million, and was completed in 2000. The financial planning model has become the organization’s standard platform for studying the financial implications of all its decisions. The model enables the ASO to evaluate short-term budgetary implications as well as financial impact based on a ten-year planning horizon.

The need for a new long-range plan also provided a critical opportunity for collaboration. For the first time, multiple task forces involving musicians and chorus members, staff, board members, volunteers, and representatives of the community worked together to develop the plan’s content. Sometimes a musician led a task force, sometimes a board member, sometimes a staff member. Vulgamore attended meetings only by invitation. “That was not outsourcing,” she says, but rather “giving permission for thinking.” Task force leaders met regularly to coordinate agendas, learn from each other, and verify shared direction.

Surely one of the most crucial moments in the ASO’s cultural journey was the selection of a new music director. The orchestra’s developing culture was immediately challenged and tested. Empowered musicians were encouraged to define what was

The ability to collaborate joined excellence and curiosity at the top of the committee's list of requirements for its new artistic leader

needed next, and the search committee was charged with “striking high” and “thinking out of the box.” There were no top-down directives from management or the board. Recognizing that selecting the right music director was a critical lever in achieving institutional goals, the search committee acknowledged the need to find someone who could build consensus and unite everyone in the organization around a common purpose. The ability to collaborate joined excellence and curiosity at the top of the committee’s list of requirements for its new artistic leader.

The ASO hired Robert Spano as music director in September 2001. Spano’s exemplary achievements with major orchestras and opera companies coupled with his natural openness seemed a perfect match for the orchestra. Described as an educator, innovator, and collaborator, Spano is a new-era maestro—hip, informal, and willing to mix with folks, as well as a powerful and charismatic leader who knows what he wants artistically, and how to get it. Spano believes that the best artistic results occur when ideas have enough space to develop, and he strives to give “breathing room” to artists—from listening to what they

want to play and why, to making them partners in shaping a performance, to helping them solve musical and institutional problems. His ability to give space aligned with Vulgamore’s management style, and together they created a culture that prizes the vibrant and unabashed sharing of ideas (good and not-so-good), freedom of expression, mutual respect, and ambitious aspiration. In the same way that Vulgamore set out to stimulate new conversations and create new decision-making behaviors, Spano enlarged the artistic conversation at the ASO. As one musician says, he “is a leader who is energized by what comes next or what can be new about what was old.” The same could be said of Vulgamore. Their approaches were organic, keenly aware, and deeply process-oriented.

To add further strength to the artistic leadership team, the ASO also appointed Donald Runnicles as principal guest conductor. Together, Spano, Runnicles and Vulgamore formed a groundbreaking Creative Partnership Team that defined a new collaborative model for developing musical programs and other projects. Norman Mackenzie, who serves as director of choruses, contributes to the creative energy of this collaboration.

New Behaviors and Practices Emerge: A Closer Look at the ASO Culture

The ASO’s culture and the principles that drive it are completely transparent. It is based on high inclusion and a participation imperative. People are encouraged to participate in organizational life, and those who do are better off than those who don’t. Courage wins respect, and even unpopular contribu-

tions are welcomed and appreciated. Participation generates rewards, among which are greater inclusion and a place at the table where critical issues are being decided. People are at the center of decisions at the ASO, and there is collective ownership of both decisions and implementation strategies by as many stakeholders as the ASO can manage. “Work hard and play hard” is actually a rule at the ASO, and a key principle of its culture is the unfettered enjoyment of both work and play.

All the organization’s most important work is done in cross-constituent teams or task forces. “They can go on forever and drive you crazy,” says one staff member, but clearly it is a joyful madness. People do not always walk away agreeing, but they have learned to disagree. Meetings mean learning, as do “conversation room” encounters. Communication at the ASO is surprisingly direct. People talk at once in meetings, and voices rise and fall with passion and humor. Dialogue is intelligent and intellectual, but it is also informed with the speakers’ genuine beliefs in the importance of what they are saying and doing at any moment.

Usually the work begins with a game challenge: “We need to go over here, and we don’t know how.” It is a deeply personal process, and everyone “has his or her skin in the game.” All constituents share an assumption that the sum is greater than the parts, and they focus on the big issues, working

hard to keep their individual issues or positions in check. At the same time, they are expected to bring their own ideas and contributions to the table. Participants join discussions as equals—regardless of their titles or roles within the organization. What is important and valued is creativity. The core belief is that group creative solutions are better than those generated in isolation, and that real creative consensus emerges from the free expression of ideas by individuals within the group.

This kind of freedom would not be productive or even possible without a high degree of transparency and authenticity—not to mention camaraderie, compassion, trust, and respect. The ASO shares all its information, including financial data, personal and organizational successes and failures, worries and concerns. Open sharing of challenges and difficulties makes it easier for the organization to celebrate achievements, and it deepens the appreciation of the individual contributions to organizational success.

At the ASO there is no difference between personal and office posture. One senior staff member says, “I tell prospective employees, you will not live a life here where you go home and you are one kind of person and then you come to work and you have to be someone else.” Another adds that in many organizations “you just go to work and the president doesn’t even know your name. But I get a personal phone call when I am going through something, and that is a big deal to me.” People are willing to expose themselves and their ideas because they know they are respected

and trusted. Diversity of opinion is extremely important to the ASO. As one musician says, “I am glad that an orchestra is big enough and varied enough to accommodate eccentrics. They can spur you to think differently.”

This brutal honesty rarely violates implied boundaries. Says one ASO member, “We are animated and we can be very forceful, but it’s always bounded by a sense of respect.” This can be a risky personal environment, but people embrace the risk because they know they are cared for. The culture also flourishes because there is an abundance of fun and a conscious focus on humor and celebration. “If you don’t have a good sense of humor, and if you cannot appreciate someone who might be sarcastic or crude at times, then we’re probably not going to get along,” says one staff member. “You can never have enough celebration,” says Vulgamore.

When describing how the ASO leadership functions in this culture, ASO leaders compare themselves to traffic controllers. Organizational activity is moved by a series of trains—all running at the same time on multiple tracks at different speeds—and some trains are further ahead or carry more cargo than others. Leaders do not drive the trains but continually assess and reassess progress, evaluating what has been accomplished and what still needs to be done. They respond by sending some trains back out, holding some trains in the station for a period of time, or changing the speed of the trains in order to ensure that they all arrive at the right stations at the right time and with their cargo intact.

Culture in Action: The War Room

The ASO’s War Room (a reference to the 1964 film *Dr. Strangelove*) is a model of the ASO culture in action. It is a process and a place where strategic programming decisions are made and where organizational visioning occurs. First established in 2000, the War Room brings together the Creative Partnership Team (president, music director, principal guest conductor) with department heads, artistic personnel, and others to ensure that programming choices represent the full range of the ASO’s mission and priorities. All season programming is done in the War Room. Discussions also cover artistic needs and priorities, marketing and fundraising issues, education and community goals, budgetary implications, and other issues—all viewed together organically and contextually to enable the ASO to translate its strategy into high-impact results. The ASO also devotes time in the War Room to larger topics, such as touring, commissioning, “blue-sky” brainstorming, and other macro-level activities.

Season planning at the ASO begins 24–36 months in advance. To start the process, BHAGS—Big, Hairy, Audacious Goals, a term coined by business consultant Jim Collins—are posted on a planning grid, and ideas begin to flow, including ideas from individual team members as well as “Spano’s Specials.” The War Room meets monthly—usually for four or five hours—and there can be as many as 20 people working simultaneously to program a season. There are agendas,

assignments, preparatory work to be done, and schedules to maintain. Although the conversations may be wildly open and the process almost uncomfortably free-flowing, War Room activity is propelled by deadlines and getting the job done.

The War Room team works together to design a season that is vetted through multiple lenses: What would be a great concert and what does that mean? Will it sell? Does it fit into the orchestra's artistic appetite for the year? How does it fit with previous and future seasons? Will it contribute to the orchestra's artistic growth? Does it sufficiently stretch and challenge everyone in the organization? Will it build stakeholder and audience commitment? How is it balanced with other things chronologically in the season? From both a sales and artistic point of view, how can the team construct a season that will permit the greatest possible institutional success? How should the organization best use its

financial resources for library costs, grand rights (legal permissions for dramatic performances), production expenses, etc.? What are the really important choices and trade-offs to be made? There is an underpinning of improvisation to the process, with variations emerging from fundamental organizational themes, and with participants "riffing" off each other's ideas to create new insights, deeper meaning, and more interesting programmatic combinations.

The War Room has been described as a laboratory in which a multi-talented group of high achievers pour their ideas into one decision-making centrifuge. They share with others what they know and believe. Then they work towards decisions that reflect shared understanding as well as individual perspectives. As ASO Artistic Advisor Evans Mirageas explains, "I would love to show you the final markup version of any one season to demonstrate how sometimes a program changes 20 or 25 times before it is finalized. That means that the program in the end is the result of a tremendous amount of care and devotion to its creation."

The War Room is an intense experience, an environment where almost "anything goes." It is also hard work.

"You do the best you can, and by and large everybody brings something to the table even on a bad day"

To make it successful participants must be passionate, knowledgeable, fiercely committed to their ideas, and tough. They must be quick-thinking, able, and self-confident enough to be inquisitive—even argumentative—in the moment. They also have to be humble. With 20 high-powered, competent individuals all vying for influence and input, emotions can surge and tempers can flare. There is a good amount of yelling and sometimes even tears. "If you bring a bad idea to the table, you are going to get shelled without hesitation," says one participant, "and you have to be okay with that." Says another, "This is a humbling business even when you think you know what you're doing. It takes a bit of a thick skin."

Participants in the War Room also must be thoroughly prepared. If someone hasn't brought expected information to the table, "there can be a total meltdown and it can be ugly," says Vulgamore. "We started to have pre-War Rooms to make sure we were ready because when you get Robert [Spano] in there you want it to be the most creative, functional, and efficient that it can be....but sometimes no one can save you." The environment is not punitive, but it can be embarrassing if you don't carry your weight. "You just have to adapt, and we power through it," says one participant. "You do the best you can, and by and large everybody brings something to the table even on a bad day."



Former Atlanta Symphony Orchestra President and CEO Allison Vulgamore leads a War Room discussion

Although the Music Director brings his own musical agenda to the table, he participates as a member of the programming team rather than delivering a season of programs for the group to discuss. "My ideas get altered all the time," says Spano, "which is why this process is so valuable. If my decisions and understanding of things were not changed or influenced by other people, then there would be no point in talking to them." At the same time, Spano, like his teammates, does not defer easily to pressure that is not backed up by reason, facts and incisive argument. Together Spano and other War Room participants elevate the conversation well beyond the lowest common denominator of many group processes, creating a more clearly defined artistic profile, and solidifying the ASO's collaborative culture.

Senior leaders consciously aim to demystify the War Room. Being part of a meeting doesn't make anyone more or less important. Anyone may be called into the War Room to address an issue if he or she has relevant and valid information that will inform critical decisions. What is important is getting the right people in the room, giving them the right information, empowering them to aim high, and reminding them that great things will come through the process.

Developing Readiness: Key Enablers of Cultural Change

Allison Vulgamore clearly had the professional credentials to lead the ASO through a tricky transition, but when she took the top executive job at the ASO, she was as yet untested in that role. A trained musician and student of voice, Vulgamore had served as artistic administrator and general manager of the National Symphony Orchestra, as well as general manager of the



New York Philharmonic. Her career began at The Philadelphia Orchestra (where she recently returned as president and CEO). What the board of the ASO perhaps only sensed was that in Vulgamore it had found the energy, youthfulness, and curiosity of an emerging national leader whose experience and instincts told her that the orchestra "could pull itself back together only through a process" rather than through top-down enforcement of an artistic and management platform. In hiring Vulgamore and in trusting her collaborative impulses, the board took its first and most fundamental step toward lifting the orchestra out of crisis mode, solving systemic problems, and improving institutional performance across multiple dimensions.

Many conditions can create opportunities for cultural change. In the case of the ASO, four conditions came directly into play: a financial and cultural crisis that made change both urgent and

imperative; artistic and administrative leadership transitions at the top that provided opportunities to embrace a new style and approach; a history of organizational responsiveness to ambitious and creative leaders; and the ASO's geographic location, which gave it the space and safety to go against the grain without attracting too much attention at early critical stages of its experiment. While conditions may differ in other orchestras, the challenge to all leaders is to recognize when conditions are right to act boldly and make a leap of faith in a new direction, even if it is impossible to know at the outset where that leap might land them.

Such conditions are risk-enablers, and risk-taking is critical to all organizational change initiatives. For organizations seeking to understand and leverage their own conditions to embark on such a journey, the ASO experience illuminates numerous universal enablers, or success factors, that promote the development of a collaborative culture.

ASO Principal Guest Conductor Donald Runnicles, former President and CEO Allison Vulgamore, and Music Director Robert Spano at Verizon Wireless Amphitheatre at Encore Park in Alpharetta, GA

Modeling Behavior at the Top

Without board endorsement and participation, cultural change at the ASO would never have happened. The board actively supports the new culture by sharing its table with others, increasing its participation and work load, and focusing on its own learning and maturity as a governing body. ASO senior leaders model collaboration at all times, serving as a hub or epicenter of their own circle with vibrant collaborative activities constantly overlapping and permeating departmental boundaries. The shared artistic leadership model, one of the first in the orchestra industry, best exemplifies teamwork, inclusion and open communication. The stylistic personality of the three collaborative partners (music director, principal guest conductor, and CEO) is bursting with vitality and *joie de vivre*. The music director and the principal guest conductor also model collaboration. While handling their own individual responsibilities, they readily share the limelight in order to execute artistic programs, consulting with each other on all artistic matters and participating in a wide range of non-musical institutional activities.

Vulgamore and Spano, in particular, brought leadership characteristics that enable collaboration. Vulgamore describes herself as “being myself and being fully present” at all times. She insists on open doors. She has high expectations and is extremely demanding, but she is a self-described “spiritual” person who manifests sympathy, understands human needs, and is not afraid to acknowledge her own vulnerability. Spano’s demand



If leaders give people the right information and a context for examining it, they will get the right decisions.

for excellence and commitment is leavened with charm, enthusiasm and a down-to-earth demeanor. In meetings and in the War Room, he quickly changes from maestro to equal collaborator on any assignment or project, inspiring others to contribute their best ideas. Like Vulgamore, he “doesn’t make you feel like you are being judged in every single presentation you make,” and he sets aside time to work through issues sufficiently to achieve the best results.

Hiring the Right People

An individual’s fit within any organization will be determined by the culture, but leaders must clearly

understand what they are looking for and why. Chemistry matters as much as credentials, regardless of the role in the organization. The ASO hires overachievers. An intense interview process screens potential employees for their compatibility with the organization, and those who are comfortable within the culture generally stay a minimum of five years. Not surprisingly, self-motivated extroverts with strong personalities are usually at home at the ASO. A readiness to learn and grow, a comfort with complexity and ambiguity, and a genuine appreciation of eccentrics are also defining characteristics.

Remembering the Artistic Imperative

The desire to maintain the highest possible artistic standards motivates everyone at the ASO, and it imbues their work with a sense of purpose, discipline and cooperation. The Creative Partnership Team actively engages musicians and the audience to explore a creative programming mix, recording opportunities and interdisciplinary projects. The War Room keeps programming focused on institutional mission and goals. To increase diversity in the orchestra field, the Talent Development Program supports artistic training for young African-American and Latino student musicians. In Theater of a Concert, the orchestra works with installation artists to present a unique mix of musical pro-

gramming and visual enhancements that engage multiple senses to help deepen appreciation and understanding of the music. The Atlanta School of Composers, now celebrating its 10th season, is a multi-year partnership with four composers (Michael Gandolfi, Osvaldo Golijov, Jennifer Higdon, and Christopher Theofanidis) that reflects the ASO's commitment to championing new music and ensures that the creation of music is as important to the organization as performance.

Numerous Grammy Awards, the 2007 ASCAP Award for commitment to new American music, and a prestigious Mellon Foundation grant to support creative projects testify to the ASO's contributions to its art form. In 2008, Spano was named "Conductor of the Year" by *Musical America*.

Outlining Clear Values and Principles

For innovation to succeed, the principles that drive an organization's culture must be explicitly stated and universally embraced. The ASO identifies several guiding principles that support its culture:

- Leaders are the first to tell important news, good or bad. They do not delegate its delivery or blind-side their colleagues.
- When things are going badly, it is critical to stay focused on goals, to maintain a clear sense of purpose and direction, and to ensure good communication and direction.
- If leaders give people the right information and a context for examining it, they will get the right decisions.
- If leaders keep their door open, people will come in and share a wealth of important information. Lots of problems can be avoided this way.

→ Big egos and self-confidence are assets, but selfish actions and the urge to control others undermine collaboration.

→ Be patient. Manage the delays. Tolerate failure. Always seek alignment. Building culture is done one small step at a time. It is hard work and takes time.

Managing the Culture Through Good Leadership Practices

Sound leadership practices that are purposefully monitored and based on clearly stated principles help to manage and fuel the ASO's collaborative culture. Among the core practices at the ASO are:

- Articulating a clear vision for the organization that is easy to imagine and communicate, and that can spark motivation and employee commitment, align projects, and create rationale for changes
- Visioning far into the future, continually revisiting and examining personal and collective mission, and encouraging employees to imagine and dream about what *could be* at the same time that they are dealing with what *is*
- Thinking freely and holistically—reconciling opposing views, balancing long-term wish lists with short-term goals, looking for synergies, and seeking to understand consequences of actions throughout the organization
- Reviewing and updating progress regularly to enhance understanding and increase ownership
- Investing time, energy and other resources in generating ideas and building consensus, and establishing a sense of urgency and excitement that draws people out of their comfort zone
- Focusing on people by demonstrating genuine interest in differing opinions, being as flexible as possible in accommodating individual needs, expecting and rewarding active participation, publicly recognizing individual success, tolerating emotions, and engaging others beyond the "usual suspects" in artistic decision-making
- Actively engaging musicians in all aspects of organizational life
- Embracing and facilitating challenging situations, enabling debate and frank discussion, welcoming noise and conflict, tolerating uncertainty and ambiguity, and unlocking people's capacity to thrive on complexity and diversity
- Using creative and non-linear tools in meetings, such as models, mock-ups, sketches story-telling, mind-mapping, etc. to prototype new solutions that arise from empathy, intuition, imagination and idealism and that stimulate innovation and change
- Developing individual and organizational knowledge and capabilities
- Talking about the culture and developing a common language to describe it
- "Walking the Talk" by demonstrating consistent behaviors, inspiring people through personal example, taking responsibility for one's own participation, and doing what needs to be done

Establishing Systems and Processes

The ASO describes itself as an incubator—a place where a network of creators and collaborators recognizes the inherent value of ideas, and works to overcome external and internal resistance to them. The incubator nurtures and nourishes emerging ideas, products and technologies that are not yet ready for adoption, investing both intellectual and financial resources in their development.

ASO leaders purposefully monitor organizational culture and ensure that internal structures validate and reinforce it. The New Era Team, established in 2003, is a cross-constituent task force that includes members of the board, the musicians of the orchestra, and staff. The New Era Team meets four times per year. Its charge is to develop a deep understanding of ASO operations; to study and debate pertinent issues; to vigorously explore viable solutions to problems; and to make specific recommendations to the Executive Committee for implementation. The Joint Cooperative Council meets quarterly and ensures ongoing communication among musicians, the

music director, and other constituents. The Dream Team addresses orchestra financial health on a monthly basis, using business modeling to make predictions and consider consequences. Its mandate is to make the ASO's "dreams" come true. Numerous cross-constituent task forces are assembled on an ad hoc basis to focus on specific initiatives. The collective bargaining process is forthright and constructive, with a focus on transparency, information-sharing, constructive evaluation of needs and possibilities, and timely completion. Musicians actively participate in all aspects of ASO life. They populate cross-constituent teams and task forces, attend annual retreats, and have a voice in artistic planning.

THREE STEPS FORWARD

Impact and Learning

The ASO's achievements in the last decade reflect unprecedented growth in the artistic, organizational, and community arenas. During this time, the orchestra engaged in innovative artistic transitions and collaborative partnerships, undertook major fundraising and revenue expansion efforts, and created inventive community engagement and training programs while building a culture of constant collaboration among the organization's diverse constituents. This unique orchestra model has resulted in exceptional balance on stage, internally, at the negotiating table, and in the community.

A fundamental crisis in institutional performance drove the ASO to change its culture, and today, many of the orchestra's achievements in other areas can be attributed to its new approach to process and to the ever-increasing impact of its developing culture. Reaching collective bargaining agreements with musicians collaboratively and early became standard

practice. New financial modeling and research tools improved decision-making. The War Room enriched the orchestra's programming and helped focus its artistic identity. The orchestra successfully balanced its budget, increased ticket sales, expanded its donor base, continued successful national and international concert appearances, and made distinguished recordings. When it purchased the national telemarketing firm SD&A, the ASO also began to diversify its business model. The ASO's leadership continues to ensure that cross-constituent decision-making is standard practice throughout the organization, including in major searches, program planning for the new concert hall, negotiating labor agreements, engaging new communities, approaching new donors, and understanding audience patterns—in short for every major issue or decision the organization faces.

Certainly, the organization believes that its collaborative culture positively affects artistic performance. "The orchestra plays well because it is happy....and it is happy because [people] are passionately committed to what they are doing," says one ASO member. Musicians, in particular, make a correlation between the culture and their performance. The art, they say, "flows freely and we can make better music. There is no 'us vs. them' to hold us back." Composers say that

Reaching collective bargaining agreements with musicians collaboratively and early became standard practice

musicians who are happy and satisfied tend to practice more and devote more time to learning new music. They can “hear the difference” in the orchestra’s playing.

The new culture has had a profound impact on individuals, improving their morale, encouraging their personal growth, giving them the authority to speak for themselves, and liberating them to think creatively. The requirements of constant interaction help advance both social and professional skills—communication, negotiation, listening, and analysis. People claim to have gained greater ability to confront conflicts, make difficult decisions, and to reflect on their own behavior. Because new employees are given major responsibilities at the outset, it is easy for new leaders to emerge and find a place in the organization. “I find my relationship with the orchestra very rewarding and special. I have never had anything like it in my life, and I can’t tell you how much I value it,”

says Spano. A composer adds, “[musicians] have really shaped the way I write music. They keep coming back to me and I go back to them: ‘It does or it doesn’t work. Try this.’ The mentality is definitely very professional. They try very hard to have an influence on what is being done.”

The culture also influences organizational behavior and promotes innovation. Throughout the ASO people believe that the culture of inclusion, cross-pollination and transparency creates fertile ground for individual and collective creativity, stimulates bold thinking, and raises the capacity of the organization to solve complex problems. A focus on process rather than rules and procedures strengthens direct lines of communication, but it also creates a nexus of informal lines of communication—defined but not codified—that

When multiple voices are heard, unethical or unconstructive behaviors are less likely to get traction



Members of the ASO’s Talent Development Program play at a Board Meeting at Verizon Wireless Amphitheatre at Encore Park

Music Director Robert Spano conducts the Atlanta Symphony Chamber Chorus in a Theater of a Concert Production of St. John's Passion at Atlanta Symphony Hall

reinforces the process. A healthy offline capacity to communicate improves online communication. There are hardly any surprises when it comes time to make decisions.

The lesson of the ASO experience suggests that if an organization wants to be an innovator (and wants innovations to stick), it must engage all its human resources in a spirit of collaboration and shared purpose. An inclusive process also reinforces good business ethics. When multiple voices are heard, unethical or unconstructive behaviors are less likely to get traction, and the power of the group holds participants accountable to the established norms—assuming, of course, that those norms and principles have been clearly defined and are universally understood.

To innovate, an organization must build a culture of innovation systematically and incrementally over time, and that means keeping the organization in a perpetual state of reinvention. Radical ideas must be the norm, not the exception. Having more vision than the organization can implement is a good thing. It gives people a framework for creating new goals and keeps the organization focused on achievement. It is impossible to innovate without first



providing the framework to enable it, but once that framework is working the experience for participants is infectious and dramatic. People working together with a sense of play and delight on something they perceive to be both important and transformative, will drive innovative practice.

In this culture, leaders need to know when to step back and let the process evolve, giving employees the latitude to find their own solutions while looking for potential obstacles and impediments as well as for opportunities to accelerate the process. It may look like chaos, but it is not, and it requires high tolerance and discipline to manage well. Part of that discipline applies to the preparation for the work. This work must be meaningful and purposeful, and participants must believe that what they do will have powerful

implications for the organization's future. Preparing for this work requires thinking before doing.

Perhaps the most significant outcome of the ASO's cultural journey is that it has transformed itself into a learning organization. It learns from outsiders and peers. It learns from fellow arts organizations. It learns from its community and its social and cultural environment. But most of all it learns from itself. Readiness and opportunism are key and cherished values. Leaders and others must be ready to learn from any new situation, even if it is negative. Innovations can and do fail, and it is

critical for leaders to be able to distill learning even in the midst of discomfort. Spotting these learning moments while the process is unfolding (and translating that learning into action) is an important system skill. Culture must be constantly nurtured and reignited. Like a flywheel, collaboration builds momentum with very small inputs, but it can release large amounts of stored energy when needed. Institutional leaders must know how to spark spontaneous brilliance and invite unplanned moments of courage.

THE CONTINUING JOURNEY

Future Plans and Aspirations

The ASO depends on the synergies embedded in its collaborative culture. With lots of work to do and many challenges ahead, the orchestra's belief in the systemic relationship between culture and problem-solving will be continually tested. Giving life to new music and space to composers, challenging and educating audiences through new program formats, building its new concert hall, and engaging the city of Atlanta in a multitude of partnerships that would solidify the orchestra's role in the community are just a few of the tasks ahead.

The ASO has had great success in institutionalizing its culture, but it knows it faces a multitude of challenges. How can it build the idea of a strong collaborative culture into a brand for the orchestra? How can it better integrate new employees into the culture? How must it balance the time required for the group process with the demands of fixed deadlines? How can it manage the employee workload and maintain a reasonable work-life balance? How can it make certain that the systems in place for managing the organization's creative chaos don't become so heavily focused on completing tasks that they result in missed opportunities? Finally, how can it ensure that the culture is sustainable even when current leaders are no longer with the organization? What will happen, for example, now that Vulgamore has moved on, or when Spano leaves? It's a question that worries all institutional leaders. But on this issue, there is cause for comfort. When Vulgamore went on sabbatical for six months, she had no contact with the organization, and the ASO believes that as staff and board stepped in to fill the gap created by her absence, the organization became stronger. "Things are sustainable if they transform, change, grow and alter the course," says Spano. Recognizing patterns that no longer work and letting new patterns emerge perhaps may be the most critical challenge for the ASO.

Radical ideas must be the norm, not the exception. Having more vision than the organization can implement is a good thing.



the road less traveled: toward a new foundation

Building a House of Innovation

Perhaps the most fundamental characteristic guiding the innovative journeys of the five creative orchestras in this study is their awareness of the need for constant evolution. They know their work is not finished. All five are deeply process-oriented and have improved their capacity to embrace organizational complexity and ambiguity. Functional silos do not—as they once did—define the visioning, goal-setting, decision-making, and implementation activities within their organizations. While functional responsibilities still exist, it is to produce efficiency and accountability.

These orchestras also model organizational approaches that are curious and learning-based, disciplined, and highly intellectual. They have developed new language to describe their work—language that distinguishes their cultures, builds ownership, fosters inclusion, and promotes shared understanding. They question closely held and conventional assumptions and they purposefully and intentionally blur traditional roles—which means taking risks. Indeed, risk-taking is fundamental to their strategies, and they invest financial and human resources in experimentation.

All five orchestras pay close attention to internal culture and work consciously to ensure that it enables rather than impedes vision. They think long-term while insisting on prudence in the present. They are flexible, alert to opportunities, and self-aware. They build evaluation criteria and assessment practices into their planning and execution. Above all, they focus on the human factor. The well-being and satisfaction of the organization's stakeholders are critically important, and while institutional life is intense and demanding, it is also joyful.

THE INNOVATION MODEL

House of Innovation

Fearless Journeys: Innovation in Five American Orchestras tells the stories of five orchestras and their successful modeling of new innovative practices. Their innovations originated under varied circumstances, sought to affect different areas of orchestra practice, followed multiple implementation paths, and achieved varied results. Despite these differences, however, several factors are consistent among the orchestras, and their experiences serve to inform, inspire, and reinforce efforts underway in orchestras across the country.

The structure of innovation is consistent among all the orchestras studied. *Leadership and vision* give shape, protection, and safety to ground-breaking work. An *open artistic model*, *prolific partnerships*, and *effective integration* act as supporting pillars. Underlying and sustaining it all is a foundation of artistic excellence that provides the fundamental strength to think and behave in new ways.

A Committed Team of Leaders

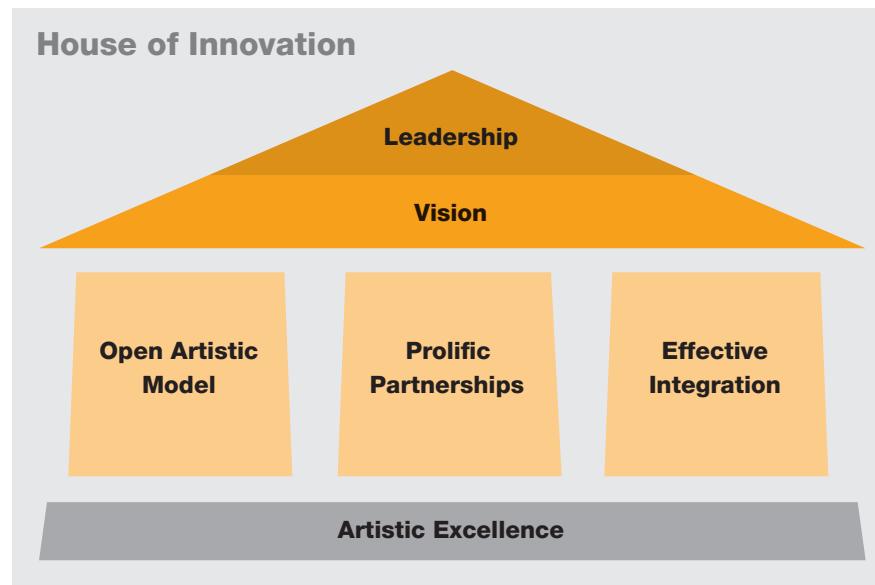
The desire and capacity to lead innovation were central to innovation success in each of the five orchestras studied. The top executive, chairman of the board, and the artistic leader(s) were key enablers, together forming a powerful triad of architects for developing and realizing innovative design within the organization. This close-knit inner leadership circle shared a common vision and enforced institutional values and artistic integrity with intent and rigor. They were in constant

communication—vigorously interactive, and aligned and additive in their views, ideas, actions, and efforts. Even though the roles at the top were distinct, leaders often intentionally blurred role boundaries to enhance collaboration and stimulate input. During this process, each of the top roles evolved to become less conventional and more flexible. Honest about recognizing their own limitations, the leadership team often brought in external collaborators who contributed specialized expertise or academic knowledge.

These leadership teams—the Creative Leadership Team in Atlanta; Pacific Symphony's model of music director, executive director, and artistic advisor; the Los Angeles Philharmonic's team of music director, president, and director of artistic planning, for example—were augmented by sub-groups of leaders that were integral to advanc-

ing the artistic agenda. The Saint Paul Chamber Orchestra's Artistic Planning and Artistic Personnel Committees, the Atlanta Symphony Orchestra's War Room participants, groups of musicians in the Memphis Symphony Orchestra who took responsibility for community programming, and cross-constituent teams tackling specific tasks in all the orchestras became crucial contributors to artistic leadership. The capacity of these organizations to support clearly recognized leaders at the top while creating a more diffuse system of inclusive organizational leadership brought substance and sustainability to innovative practice.

Leadership continuity at the top of the organization was critical to enabling and sustaining innovation in these organizations. The multi-year collaboration between board leaders, the top executive, and the artistic director(s)—and their shared views about institutional direction—focused



Leaders lifted the spirits of their people from daily activities towards aspirations

and strengthened the organizations internally and clarified their identities or brands externally. Leadership continuity ensured consistent vision and execution, careful monitoring and evaluation, and regular adjustments and realignment. Continuity for these organizations meant not only that leaders had sufficient longevity to understand each other and to work efficiently together, but also that when leadership transitions did occur, the organization knew exactly what it needed to continue its momentum. Carl St.Clair and John Forsyte, for example, have worked together for ten years. Allison Vulgamore led the Atlanta Symphony for 15 years, working with Robert Spano for the last eight. Esa-Pekka Salonen was music director in Los Angeles for 17 years. Deborah Borda worked with Salonen for nine years and now is carrying that legacy forward in her new relationship with Gustavo Dudamel. Bruce Coppock and Lowell Noteboom worked side by side in Saint Paul for nearly ten years, and they handed off the orchestra's new artistic model to Sarah Lutman and Erwin Kelen without a hitch.

Executive Leadership

Clear vision and decisive actions were hallmarks of successful executive leaders in all five orchestras. The CEO and his or her team worked closely with artistic leaders and with the board to articulate, communicate, and execute

the orchestra's innovative artistic goals. They focused people on the future—encouraging them to be farsighted in their outlook while insisting that they be efficient and productive in the short term. Leaders lifted the spirits of their people from daily activities towards aspirations. They conducted regular updates on long-term plans to affirm priorities and maintain momentum. They skillfully translated abstract concepts into the specific action steps that would lead to dream fulfillment.

These leaders were primarily externally oriented. They monitored, and learned from the business environment within and outside the industry, and considered best practices and innovations in the business environment for their internal application. They pushed people to think and learn outside the orchestra's walls. The transparency principle guided their leadership actions, and they apprised constituents of information in a timely manner, engaging them fully in executing the orchestra's vision. In addition to striving for institutional relevance and artistic excellence, they used financial forecasting and multiple scenario considerations to look way ahead to ensure the financial viability of the organization.

These leaders had the ability to manage complex non-linear processes that involved multiple constituencies. They had the ability to see the entire system, the keenness to recognize synergies as they emerged, the ability to create reciprocity within the system,

the insight to know when one small intervention could create an important tipping point, and the patience to step away so that others could engage more deeply. They possessed deep intuition, strong analytical skills, and an understanding of intended and unintended consequences. They could change course when necessary, find new strategic paths to get past obstacles (both real and imagined), and give credit to others for institutional accomplishments.

Resilience, open-mindedness, self-confidence, and tolerance for risks were also common traits of these leaders. Their passion for and commitment to the institution were essential to getting others to follow—even when there was “too much vision” or when staff felt as if they were “drinking from a fire hose.” Most important, these leaders were fearless; they initiated innovations that departed from and often greatly disagreed with industry traditions. Assuming, as they did in Los Angeles, that contemporary music was a taste for the masses was generally anathema to the industry. Taking the music outside the MSO’s concert hall to teach corporate folks how to team better or lead more effectively could have been seen as “corrupting” the product. Altering performances in Orange County by adding a rich context around the music to illuminate composers’ intentions or historical circumstances could have been considered “dumbing down” or selling out. When the SPCO questioned the role of the mighty music director and distributed responsibility for artistic decisions

to musicians, there was surprise in the industry. In Atlanta, building a highly inclusive orchestra culture where all decisions, including artistic ones, are made by cross-constituent teams might have meant real war in other places.

Board Leadership

In each of the five orchestras, the board was also a critical enabler of innovation. Recognizing the wealth of expertise in their orchestras' board-rooms, executive leaders challenged board members to step up and play a major role. They turned to their members' business experiences, financial acumen, organizational skills, knowledge of art and history, and advocacy and mentoring capabilities, uncovering previously untapped assets for their organizations. The deep involvement of these board members in orchestra life enabled the organizations to take smart risks with regard to innovation.

Aside from building a compelling vision for the orchestra and committing financial resources, these visionary board members understood that innovation in their orchestras was not just nice to have but a key organizational asset. As these boards advocated making the orchestras more relevant to the diverse communities, they began changing their own composition, reflecting a diverse mix of skills, interests, backgrounds, and aspirations. When deeply engaged in taking their organizations in new directions, they changed their own behaviors. They adopted rigorous operating and governance practices to strengthen their own performance. They transformed themselves from relaxed social groups to responsible and active governing bodies. They

became forward-looking working boards that, while retaining their governing responsibilities, engaged with other constituents on specific tasks to secure the orchestras' present and transform their futures. They said "yes" to more work, more time, and larger contributions.

Artistic Leadership

Because they embody their orchestras' core institutional purpose, artistic leaders in the five orchestras were critical to success. These cases clearly demonstrate that the conversation around the role of the music director increasingly is being invigorated by significant new experience. Those in the industry who believe that the old model of the strong maestro is on its last legs need only look to the success in Los Angeles to see that the model still has vibrant life in it. Those who believe that decentralizing artistic power means the death of artistic quality can turn to Saint Paul for a different lesson. Two things are certain, however, if the experience of these five orchestras is indeed representative: The unquestioned vesting of complete power and authority in a single artistic leader is becoming a thing of the past; and the lack of a single all-powerful artistic *leader* does not signify the lack of artistic *leadership*.

Even in the orchestras with a strong music director, there was a shared view that artistic leadership has become more complex, requiring knowledge and skills beyond music. In these five orchestras, as in others across the country, artistic leadership is multi-faceted. Good leadership

involves setting a long-term strategic artistic vision; executing the work by presenting products and offerings, new and old, that meet the highest artistic standards; leading artists by motivating musicians and a variety of collaborators to contribute their best efforts to both content and process; inspiring the entire organization by working closely with the executive leadership team and with the board to align institutional practice and artistic vision; and acting as the orchestra's ambassador in the community by building partnerships and raising funds.

Even in the most innovative orchestras, very few music directors score high on all the above criteria. In the five orchestras studied, however, the artistic leaders (whether a music director, a team of artistic leaders, or a group of musicians) shared a complementary

Even in the orchestras with a strong music director, there was a shared view that artistic leadership has become more complex, requiring knowledge and skills beyond music

commitment to high artistic standards and a belief in the responsibility of the institution to its community. They were, therefore, flexible in how they thought about this relationship, and they adapted themselves to an organizational vision that asked, “How do we create a decision-making model that will serve both interests effectively?” The structural answers varied, but artistic leaders shared several important things in common: they involved others in the discussion of artistic goals and strategy, programming, and delivery. They had an abiding respect for the audience and the cultural framework in which their orchestras were working.

Artistic leaders also pushed the boundaries of the art form—intelligently, rigorously, and without shame—believing that symphonic music is a living, growing and ever-changing body of work rather than a static repository of masterpieces. They believed not only in the curatorial responsibility of their work, but also in their responsibility as incubators of discovery. They involved creators and other artists in imagining what this new art form might look like. They believed in learning and in the process of discovery through music.

Driven by an Expansive Vision

A deep dissatisfaction with the status quo was the motivating factor behind building a compelling and far-sighted vision in these orchestras. Even when organizational dissatisfaction arose from financial distress, it was fueled by

something much deeper: the desire to rekindle a sense of purpose, relevancy, and artistic achievement. From this search for identity came five compelling, if different, visions—sometimes clear at the outset, sometimes taking shape over time, but always evolving in response to changing conditions and increasing knowledge.

In these organizations, effective visioning did not start and stop at the top, but rather was spread across the organization and built into the institution’s culture—not serendipitously, but methodically, strategically, and purposefully. Leaders constantly imagined and re-imagined the vision—providing strong and powerful images of the future that sparked motivation, aligned ongoing projects, informed assessment of progress, and spurred innovation. Constant envisioning of the future by cross-constituent teams generated positive energy and motivated individual performance. Having a “big vision”—perhaps too big for the organization at the time—created unprecedented synergies among con-

**Effective
visioning did
not start and
stop at the top,
but rather was
spread across
the organization
and built into
the institution’s
culture**

The SPCO performs at Wooddale Church



stituents, led to shared responsibility and accountability, and stimulated positive energy and learning. The result was a culture of questioning and inquiry that improved the orchestras’ capacity to imagine and realize their long-term aspirations.

Projecting far into the future was typically a means of stimulating imagination and liberating participants from current political interests or conflicts. The SPCO and ASO, for example, envisioned their orchestras’ future as much as 15 years ahead. The idea of *what we want to be* became a beacon throughout the implementation of subsequent innovative endeavors. In all the orchestras, long-term planning, rooted in a clear vision, also contributed to organizational health and stability, in part because the organizations were clear about what the vision would cost and because they committed to ensuring adequate resources to support the vision. They used their plans as blueprints for what



was needed rather than allowing a lack of resources to undermine a compelling vision. It was this approach that enabled the Los Angeles Philharmonic to say, “We simply do not cut identity programming.” Without this inculcation of vision into the organization’s conscious decision-making processes, innovation would never have taken root.

How vision was communicated in these orchestras is instructive. Strong, visionary leaders clearly articulated (through formal and informal channels) the future in a way that was easy to understand and easy to communicate to others. In Memphis, it was responsible citizenship through “artistically engaging community partnerships”—simple to understand and simple to explain. In Saint Paul, the orchestra used a framework of “*what* we play, *with whom* we play, *where* we play and *how* we play” to redefine itself as “America’s Chamber Orchestra.” Again, a simple idea to embrace and promote. In Atlanta, the War Room became a clearly understood metaphor for total organizational collaboration. In Los Angeles and Orange County, the orchestras rallied around living artists and unique multi-disciplinary projects to fulfill goals of identity, innovation, and excellence, establishing context for musical ideas, and redefining the

concert experience for performers and audiences. While implementing vision is never easy, it is first important to put words to it. If it can be named, it can be understood. If it can be understood, it can be done. The more people are able to talk about the vision, the more often they do so. The more often they talk about it, the greater stake they have in it and the more they feel responsible for its success.

An important shift occurred (and is occurring) in the five orchestras with regard to leadership transitions: they are becoming much more consciously and closely tied to institutional vision. In Atlanta, the search committee looked for a music director who would be a collaborator because it was necessary to reinforce the blossoming culture. A decade ago the SPCO looked for a leader who would help the orchestra imagine a future based on a clear set of institutional priorities, and when he left, the organization sought someone to lead the continuing evolution, not to change course. In Los Angeles, the transition between music directors was smooth and celebratory because Gustavo Dudamel was clearly seen as enriching and continuing the legacy of the past two decades. In Memphis, the choice of Mei-Ann Chen supports the orchestra’s citizenship role. The boards of these orchestras have taken increased responsibility for perpetuating the institutional vision rather than ceding it to outsiders or newcomers. Musicians, too, are finding they have an important voice in selecting leaders who are compatible with long-term institutional vision.

Fueled by an Open Artistic Model

Each orchestra in this study was driven by an open artistic model. In some cases, the orchestras focused on changing the artistic decision-making process to involve a wider circle of constituents in the artistic planning and programming process. At the SPCO, these changes resulted in actual structural changes within the organization to give musicians authority over artistic matters, including hiring their Artistic Partners. The SPCO created a more open audition process as well, developing new ways to identify musicians’ fit with the orchestra. In Memphis, musicians took charge of designing the community engagement programs.

In other cases, the structural changes were not so dramatic, but the decision-making process changed nonetheless, linking it carefully to institutional mission and goals. In Los Angeles, the music director programs the season with the president and the vice president for artistic planning. The orchestra engages festival curators to develop the aesthetic framework for the orchestra’s identity programs. Atlanta’s War Room engages as many as 20 people in an organic conversation aimed at creating a season program that is both closely related to the orchestra’s identity and serves a variety of cross-departmental needs. Gone are the days in these innovative orchestras when the music director

delivered a season of programs and the rest of the organization busied itself with selling it.

Not only did these orchestras develop new decision-making structures and procedures; they also began thinking of the core repertoire in more open ways. They expanded it to focus increasingly on contemporary music, surrounded performances with contextual material, and undertook creative multi-disciplinary projects that pushed the boundaries of the art form. Pacific Symphony's American Composers Festival and Young Composers Competition, Atlanta's Theater of a Concert, and novel projects in Los Angeles and Saint Paul brought new meaning to the classical repertoire and enriched the concert experience in unexpected ways. In Memphis, "open" meant thinking about ways to use the artistic talents embedded in the organization for new purposes such as corporate training and community engagement. In Saint Paul, the performance experience for musicians was expanded, allowing for musician-led concerts. The critical point is that in all these orchestras, conventional beliefs about artistic leaderships and decisions were questioned, refuted, and significantly changed. The result was new life and energy throughout the organization.

In many cases, these orchestras opened themselves to outside artistic influences—a historian and scholar at Pacific Symphony, corporate curriculum writers in Memphis, composers and other artist curators in Los Angeles, Artistic Partners in Saint Paul—as a way to strengthen and

inform new artistic activity. The range of internal and external influences on artistic decisions varied widely, from simple informational input to an elaborate process involving multiple constituents. But the inclusion of unusual suspects enlivened the internal life of all of the organizations and broadened thinking among all internal constituencies. Thinking about the contemporary social context for the orchestra's work, the composition and needs of unique communities, the sophistication of audiences, musicians' preferences, and the challenges of marketing and development—all as part of a conversation about the art—inspired a level of understanding and commitment that had not existed previously in the orchestras. Over and over again, people within these orchestras report improved job satisfaction and an increased sense of ownership of the orchestra's core product.

One of the critical results of this new openness appears to be the recognition of the audience as central partners in the orchestra's creative life. The orchestras in this study have changed their language when talking about their audiences. By thinking of audiences as intellectually curious, innately adventuresome, and open to experi-

One of the critical results of this new openness appears to be the recognition of the audience as central partners in the orchestra's creative life



mentation, the orchestras themselves have become more risk-tolerant, allowing them in turn to lead taste and influence responses from the audience.

Coordinated by an Explicit Integrator

In each of these five orchestras, more decentralized decision-making led to important changes in staffing structure. The need for accurate and timely communication, the inclination to think more organically, and the complexity of engaging multiple viewpoints on a variety of issues rendered the historic model of deep functional expertise (marketing, fundraising, artistic planning) obsolete. The orchestras had to think differently about how to create efficiency in a more open model. Innovation, they learned, required effective integration across these functional silos to ensure the development of robust products and processes, as well as the adherence to the core mission.

The orchestras were successful in managing innovation because they recognized the need for someone to coordinate activity, sustain momentum, and move people and processes forward—and they clearly delegated this responsibility to a member of the team. In Los Angeles and Memphis this became the chief operating officer. At Pacific Symphony it was the director of operations. The SPCO relies on its artistic committees whose work is coordinated by the director of artistic

planning. In Atlanta, the role is increasingly filled by the director of strategic planning engagement. Whatever the structure, however, the integrator was armed with real power and influence. He or she sat at the top table and had access to both information and the organization's top leaders. The integrator often was assigned responsibility for new processes (partnership development at the MSO) or organizational structures (the ASO's War Room). While the innovation management aspect of the role has yet to be formalized, the experiences of these orchestras make it clear that the integrator must be in place at the outset of the innovation process, not brought on for implementation.

The innovation czars or, more frequently, czarinas, in these five orchestras had to be as fearless and single-minded as their chief executive colleagues. Throughout the gestation and implementation of new ideas, they had the tough job of making sure that execution was smooth and that final outcomes were successful. They were always at the hub of innovation activity and, like their bosses, they had to have the capacity to see the big picture. Often empowered to make decisions, they possessed all the pertinent information; disseminated data and responded to requests; made the grand execution plans and assigned tasks accordingly; fixed glitches and made repairs. They connected their orchestras' discrete departments while seeking constant guidance and approval from the executive leader. They were both the glue that held the work together and the disruptor who kept departmental boundaries permeable. Often they were described as the go-to person who was responsible for fulfilling the organization's complex

operational needs, but also for supporting people emotionally when the going got tough.

The integrators filled the role of manager while the chief executive was busy leading. Extremely detail-oriented, they all had strong management skills, and they knew how to listen actively and intervene effectively in times of controversy. They facilitated discussions and helped groups reach agreement. They set boundaries that ensured both individual comfort and team effectiveness.

Prolific Use of Partnerships

These innovative orchestras demonstrated a strong capacity to build creative partnerships with other artists, arts institutions, academics, corporations, educational institutions, hospitals, and other community organizations. Partnerships were sometimes formed through long-term relationships and sometimes arranged to execute specific projects. Some involved external collaborators and others internal teams. In all cases, however, the successful partnerships in these orchestras were reciprocal, based on mutual respect and interests, and idea-based. They were established for cultural and identity purposes, fueled by artistic creativity and invention, and key to helping organizations push past

constraining orthodoxies. Partners often helped the organizations see how their core artistic values could be enhanced and clarified through dynamic collaborations with others.

In all five orchestras, partnerships with a wide range of artists and scholars helped shape the direction and execution of artistic projects. Partnering with collaborators across multiple art disciplines stretched the artistry beyond its traditional boundaries, making the experience more fulfilling for orchestra musicians, guest artists and audiences. The SPCO's Artistic Partners, the MSO's work with teaching artist Eric Booth, Pacific Symphony's long-term relationship with Joseph Horowitz, and the Los Angeles Philharmonic's curatorial approach to its identity programming all demonstrate the effectiveness of widening the artistic family. Peter Sellars' role as artist-in-residence in Los Angeles has resulted in four theatrical stage productions, including the renowned *Tristan Project*. In his new role as creative chair, composer John Adams will expand the Philharmonic's artistic capacity even further. In Atlanta, the four composers who participate in the Atlanta School of Composers play an integral role in the orchestra's artistic life, working with staff, artistic leaders, and musicians. The ASO also has an ongoing and long-term relationship with artistic advisor Evans Mirageas,

whose expertise lends additional strength to the organization's planning and artistic profile.

Partnerships with academic institutions, corporations, and media organizations were also effective for these orchestras. The ASO partners with Georgia State University, the Rialto Performing Arts Center, and the Sphinx Organization to provide expanded educational opportunities for talented young musicians. Pacific Symphony collaborates regularly with universities to augment its annual festivals, and it is working to explore new ways in which universities could work with the orchestra to educate future audiences, develop theme-based curricula, and serve as incubators of new strategies and ideas. The SPCO developed substantial partnerships with the University of Chicago and with the University of Minnesota, and it has an ongoing partnership with Minnesota Public Radio. Building creative, artistically engaging partnerships with corporations was critical to the MSO's community partnership program, and its experience with FedEx set a standard for future collaborations. The material developed in partnership with FedEx gave the orchestra a firm start on building a corporate training curriculum.

All five orchestras in the study relied on significant education and community-based partnerships to advance their visions. Pacific Symphony's multi-faceted education program involves local schools, youth orchestras, and programs for teachers. Educational partners work with the orchestra as core partners in developing curriculum, artistic focus, and outcomes. The Los Angeles Philharmonic serves 120,000 children annually, and with Dudamel's arrival and the founding of the YOLA, the Philharmonic is on its way to setting a new standard for addressing the cultural needs of its community and for engaging young people in the performance of classical music. In Memphis, the continuing partnership with Soulsville demonstrates how mentoring and music are powerfully entwined. In Atlanta, the orchestra's Talent Development Program supports young African-American and Latino student musicians through private coaching, mentoring, and performance. The SPCO works with a range of community groups to offer discount tickets to its performances, and it has an ongoing partnership with the Jeremiah Program, a project committed to helping low-income single mothers complete post-secondary education. The SPCO offers music education to children, helping non-traditional families ground themselves in the rich traditions of classical music.

Foundation of Artistic Excellence

In each of these five diverse cases, the foundation supporting all innovative activity was a devotion to music, a commitment to excellence, and the desire to be linked with the outstanding tradition of impeccable quality nurtured by orchestras everywhere. To everyone engaged in artistic planning, what happened on stage was the most important measure of the strength of the orchestra's creative ideas and its success in connecting to its audi-

Partners often helped the organizations see how their core artistic values could be enhanced and clarified through dynamic collaborations with others

ence. All five orchestras connected artistic quality to mission—clearly and definitively. Their artistic agendas were characterized by virtuosity, innovation, and ambition. The orchestras shared a profound understanding that only great experiences bring people to the concert halls, and they opened their eyes and ears in the process of discovering a new range and diversity of artistic experiences.

As a rule, these orchestras tended to approach traditional works in a novel way—through contextual programming, festivals, juxtaposition, commentary, and other approaches that helped audiences experience masterpieces through a new lens. They also commissioned new works and introduced novel inter-disciplinary elements into their performances. They opened up discussion and decision-making to others besides the music director, fostering a greater commitment among stakeholders to the artistic life of the organization. These orchestras understood that without a foundation built on artistic excellence, meaningful collaboration throughout the organization would not be possible. Working together artistically gave these orchestras a new ability to manage conflict, new pathways to nurture leadership, and more solid ownership of the orchestra's mission.

It led to continuity of leadership, longer staff tenures, and easier leadership transitions.

The Road Less Traveled: Choices that Make the Difference

Throughout their journeys, these five orchestras made distinct choices. As a result, they learned, grew in both stature and competence, and projected a stronger identity or brand to their communities. What did they learn? Fundamentally, these pioneers agree that building a culture that embraces and encourages innovation is slow, hard work. The commitment must be steadfast and the discipline exact. Leaders must be purposeful and confident. Expectations must be clear, and everyone must understand how they fit into the picture, what their individual and group responsibilities are, and how they can make a difference to the institutional vision. They must be engaged in meaningful work. Having the right people—those who fit the organization's culture—is critical. Board passion adds great value to the process of innovation by setting high standards, providing resources, helping avoid pitfalls, and focusing the organization in both the present and the future.

Constant visioning informs and nurtures innovation. Thinking in broad system-based ways enables quick response and meaningful intervention. Collaborative processes enhance creativity. Musicians and other creative artists are deeply important to the entire process. Without their ownership and sincere engagement—regardless of the role they are asked to play—art-based innovation is doomed to fail.

Innovation must be organic to the organization's vision, and every enhancement must add value to the orchestra's artistic life, to the commu-

These orchestras understood that without a foundation built on artistic excellence, meaningful collaboration throughout the organization would not be possible

nity's involvement with the orchestra, and to the field's learning. These orchestras demonstrate the critical importance of understanding the cultural context in which they work. Their sense of responsibility drives them to take risks in the name of greater learning, and careful measuring of outcomes helps them refine strategic options.

The most fundamental choice these orchestras made was, in fact, *to choose*. To choose challenging questions over accepted practice. To choose bold action over cautious response. To choose organizational integration over functional distinctions. To choose openness over exclusion. To choose to be leaders instead of followers. And to choose new models over the status quo. For them—and for other orchestras that are in the middle of their own journeys—these choices are making all the difference.

Acknowledgements

The League of American Orchestras expresses its appreciation to the many people whose participation and support made this project possible—with particular thanks to project leader Atul Kanagat, author Lela Tepavac, PhD, and editor Catherine Maciariello for their exemplary work and dedication to this project.

We especially wish to thank the following individuals at the five participating orchestras for their support and time throughout the entire research process.

Atlanta Symphony Orchestra

Allison Vulgamore, former President and CEO
Don Fox, Interim CEO, former Executive Vice President for Business Operations and CFO

Los Angeles Philharmonic

Deborah Borda, President and CEO
Arvind Manocha, Chief Operating Officer

Memphis Symphony Orchestra

Ryan Fleur, President and CEO
Lisa Dixon, Chief Operating Officer

Pacific Symphony

John Forsyte, President

The Saint Paul Chamber Orchestra

Sarah Lutman, President and Managing Director
Bruce Coppock, former President and Managing Director

Project Steering Committee

Ryan Fleur, President and CEO, Memphis Symphony Orchestra
Robert Levine, Principal Viola, Milwaukee Symphony Orchestra / President, Local 8 AFM / League of American Orchestras Board of Directors
Arvind Manocha, Chief Operating Officer, Los Angeles Philharmonic
Ari Solotoff, Executive Director, Portland Symphony Orchestra
Steven J. Tepper, Associate Director, Curb Center for Art, Enterprise, and Public Policy, Vanderbilt University

Research Advisory Council

Marian Godfrey, Program Director for Culture, PEW Charitable Trusts, Council Chair

Alberta Arthurs, League of American Orchestras Board of Directors
Alan Brown, Principal, WolfBrown
Deborah Rutter, President, Chicago Symphony Orchestra
Paul DiMaggio, Research Director, Center for Arts and Cultural Policy Studies, Princeton University
Ryan Fleur, President and CEO, Memphis Symphony Orchestra
Robert Levine, Principal Viola, Milwaukee Symphony Orchestra / President, Local 8 AFM / League of American Orchestras Board of Directors

Arvind Manocha, Chief Operating Officer, Los Angeles Philharmonic

Heather Noonan, Vice President, Advocacy, League of American Orchestras

Jesse Rosen, President and CEO, League of American Orchestras

David Snead, Vice President, Marketing, New York Philharmonic

Ari Solotoff, Executive Director, Portland Symphony Orchestra

Steven J. Tepper, Associate Director, Curb Center for Art, Enterprise, and Public Policy, Vanderbilt University

Robert Wagner, Principal Bassoon, New Jersey Symphony Orchestra, League of American Orchestras Board of Directors

Albert K. Webster, League of American Orchestras Board of Directors

Allison Vulgamore, President and CEO, The Philadelphia Orchestra

League of American Orchestras Staff

Research and Development Department

Jeffrey Bladt, Research and Development Associate

Atul Kanagat, former Vice President, Research and Development

Elyse Kantrowitz, Manager, Research and Development

Jan Wilson, Director, Knowledge Center

Symphony Magazine Editorial Staff

Chester Lane, Senior Editor

Jennifer Melick, Managing Editor

Robert Sandla, Editor in Chief

Ian VanderMeulen, Assistant Editor

Innovation Project Leader

Atul Kanagat, former Vice President, Research and Development

Innovation Project Executive Editor

Judith Kurnick, Vice President, Strategic Communications



Gustavo Dudamel

photo credits

Brandon Dill

contents

pages 26, 31, 34, 35, 38, 39

Ashley Frew

inside cover

Spencer Gordon, iStockPhoto

front cover

Scott Heppell

pages 28, 32

Nick Koon

pages 40, 45, 46

Chris Lee

page 80

Bill Lisenby

page 83

Mathew Imaging

pages 12, 15, 16, 19, 20, 24, 97

inside back cover

Pacific Symphony

pages 10, 42, 43, 44, 45, 47, 54, 87

back cover

Rat Race Studios

pages 56, 59, 64, 90

Jeff Roffman

pages 72, 78, 79

Sarah Rubinstein

pages 7, 61, 62, 68, 71

Jose Francisco Salgado

page 45

JD Scott

page 84

Stan Sholik

page 53

Aysha Siddique

page 74

Eric Stoner

page 50

Andy Templeton

page 48



“ Fearless Journeys: Innovation in Five American Orchestras is a courageous book.

Contrary to popular opinion that orchestras are organizational dinosaurs, this book instead highlights five symphony orchestras that serve as models for organizational innovation. The book screams out: ‘If these institutions can do it, then surely innovation is possible in other fields,’ especially those less hampered by rigid hierarchies, large and expensive facilities, inflexible union contracts, inefficient cost structures, and the ‘dead hand’ of tradition. This book demonstrates that with visionary leadership, an open creative process, long-term thinking, and continuous monitoring and coordination, any organization can successfully innovate and remain competitive in a changing environment.”

Steven J. Tepper

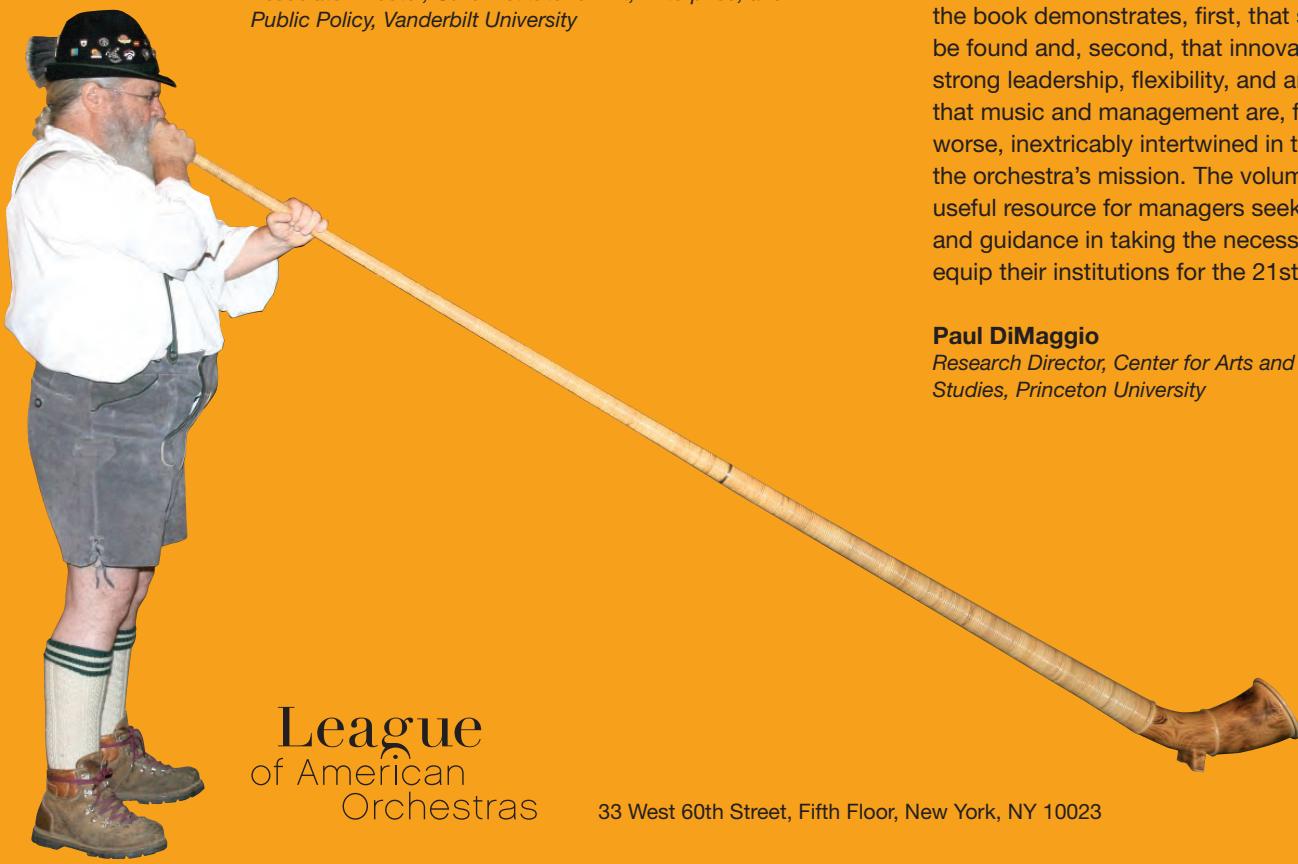
Associate Director, Curb Institute for Art, Enterprise, and Public Policy, Vanderbilt University

“ Fearless Journeys provides insightful accounts of several orchestras that have found innovative solutions to challenges that all orchestras face.

Drawing on interviews with scores of participants, the book demonstrates, first, that solutions can be found and, second, that innovation requires strong leadership, flexibility, and an understanding that music and management are, for better or worse, inextricably intertwined in the pursuit of the orchestra’s mission. The volume will be a useful resource for managers seeking courage and guidance in taking the necessary steps to equip their institutions for the 21st century.”

Paul DiMaggio

Research Director, Center for Arts and Cultural Policy Studies, Princeton University



League
of American
Orchestras

33 West 60th Street, Fifth Floor, New York, NY 10023