

Harmony

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Toward Meaningful Change

by

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Toward Meaningful Change

In 1999, the Andrew W. Mellon Foundation undertook a planned 10-year initiative designed to help a selected group of symphony orchestras examine many aspects of their work. These orchestras are intended to serve as diverse "laboratories" which can address questions important to the field.

The 15 orchestras taking part are: the Baltimore Symphony, the Cleveland Orchestra, Kansas City Symphony, Louisiana Philharmonic, New Jersey Symphony, New Mexico Symphony, Orchestra of St. Luke's, Philadelphia Orchestra, Pittsburgh Symphony, Richmond Symphony, San Francisco Symphony, Seattle Symphony, Saint Louis Symphony, Saint Paul Chamber Orchestra, and Toledo Symphony.

Catherine Maciariello has served as the foundation's program officer for this initiative since its inception. Earlier this year, she addressed a session of the Orchestra Forum held in San Francisco during the American Symphony Orchestra League's annual conference. The Institute is pleased to publish her remarks.

After explaining the roots of the initiative, she spoke of the strategies on which the participating orchestras have focused during the first three years. She then outlined six key questions that run throughout this investigation. She offered her view of progress and challenges, and concluded her remarks by detailing eight beliefs that the experiences to date have confirmed.

The Mellon Foundation's initiative has engaged hundreds of participants in both cross- and single-constituency exploration. We encourage readers who are not members of "Mellon orchestras" to consider how Maciariello's thoughts might apply to their own organizations.

Toward Meaningful Change

Good morning. Often, when we are together like this, we are inclined to congratulate ourselves on our achievements, and to sympathize with each other in the name of camaraderie and mutual support. This is a very good thing. Today, however, our intent is to expose vulnerability, because we believe that an honest consideration of our weaknesses is the first and most important step in eliminating them. So today, we are going to say some things that may surprise you. They may even frighten you or make you angry. You may be inspired by the ideas or resistant to them. Make no mistake: We join you in acknowledging the tremendous contributions orchestras make to the world; in saluting the dedication, professionalism, and passion each of you brings to the field; and in bearing witness to the transformational power of classical music. We believe in all these things or we would not have become so deeply involved with you.

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But self-congratulation is not enough, and we are here to encourage a look at our less attractive, and more vulnerable, side. In the end, it is only by examining and understanding this vulnerability that we can shape a truly distinctive and invigorating future—one that is cognizant of the past, alive with expectation, and relentless in pursuit of excellence. To invert Dickens’s familiar words, “these are the worst of times and the best of times.” In difficulty and stress we find renewal and fortitude, and we implore you in the face of seemingly daunting circumstances to aspire to new vision. This is a really important moment in our history—not one to find us napping in false security or fretting with hopelessness or rummaging around in the familiar territory of tactical short-term decisions, but rather one to unleash our boldest initiatives, our grandest gestures, and our most radical experiments.

The Mellon Foundation’s program for orchestras began in 1999, following an extensive planning period that solicited information and feedback from approximately 100 orchestras, the American Symphony Orchestra League, the

Symphony Orchestra Institute, the American Federation of Musicians (AFM), the International Conference of Symphony and Opera Musicians (ICSOM), and the Regional Orchestra Players Association (ROPA). The program is based on the assumption that there is a positive relationship between effective organizational culture and compelling artistic vision and performance. It is a 10-year initiative designed to help a limited number of symphony orchestras examine their artistic roles and missions, understand the cultural values and behaviors that influence institutional performance, explore their relationships to community and to the art form, experiment with new operational models, and build more effective working relationships among their constituencies.

Understanding that this work is complex and challenging, the foundation has tried to establish a reasonable number of diverse “laboratories” in which important questions can be addressed on behalf of the field. Substantial grants to 15 orchestras over an extended period of time provide orchestras both incentive and flexibility. Regular convening of cross-constituent teams and individual constituency groups (the Orchestra Forum), as well as an exchange program and on-site consultation, help solidify learning within individual orchestras and among the grantee orchestras as a whole. Opportunities such as this one today enable us to share what we have learned with the field and to receive feedback regarding the program’s fundamental ideas, goals, and progress.

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The Quest for Adaptive Change

In our experience so far, we have observed two significant leverage points in the quest for adaptive change in orchestras. By “adaptive change” we mean change that is generally policy-based, structural, and philosophical, and that is undertaken thoughtfully over time in response to a growing understanding of the conditions, community expectations and values, and the economic environment in which orchestras operate. Those leverage points are:

- ◆ the strengthening of internal relations among orchestra constituencies, leading to alignment around an agreed direction, effective communications, and the full deployment of all institutional assets (human and financial) in support of a shared vision; and
- ◆ the quality of constituency leadership, including the ability to create conditions for meaningful change, and the skills needed to enroll colleagues in finding organization-wide solutions to problems.

The long-term impact of the Orchestra Forum—through difficult times like the present, as well as in less turbulent periods when complacency proves

the biggest threat to creativity—will ultimately be measured in terms of its success in stimulating sustained progress in these two areas, in identifying the hard evidence that change has occurred, in generating broad-based interest in the work, and in sharing what is learned with participants across the field, including those in orchestras, service organizations, unions, and others.

In the first three years, the Mellon orchestras have focused on the following strategies:

- ◆ strengthening leadership at all levels within the organization;
- ◆ integrating artistic and institutional planning;
- ◆ creating coordinated programming across all activities of the organization that reflects and advances the organization’s artistic aspirations, develops strong bonds between the orchestra and its community, and advances the art form;
- ◆ developing a lively and diversified work environment that promotes job satisfaction throughout the organization and taps the potential of musicians to act as artistic resources;
- ◆ creating a collaborative organizational culture that promotes alignment around common goals and encourages each constituency to act responsibly to promote those goals in ways that are appropriate to their roles in the organization.

Although these issues touch all orchestras, the foundation understands that the most effective solutions to problems are likely to emerge from an orchestra’s careful examination of its own relationship to its community and markets. Therefore, the program does not seek to intervene directly, but rather to present values, methodologies, and tools that can be used effectively by orchestras to stimulate dialogue, inspire cohesion, and evoke transformation that makes sense for them.

Several key questions run throughout our investigation:

- ◆ Is the American orchestra capable—within the bonds of current organization and practice—of functioning effectively in artistic, financial, and community terms?
- ◆ Are symphony orchestras the best organizations to preserve and advance the classical music tradition?
- ◆ What are the proper roles of creators within the organization?
- ◆ What constitutes effective leadership within symphony orchestras and where does it (or should it) reside? What role does the music director have in advancing the mission of the orchestra and in serving the larger orchestra field?
- ◆ How are local cultural and educational values incorporated into an orchestra’s decision-making? How can an orchestra invite and

foster active participation from its community in order to ensure true relevancy? What does it mean to listen actively to one's community?

- ◆ How do we define excellence and measure success?

Orchestra Forum Content

To create an environment for this kind of exploration, the foundation has brought to the Orchestra Forum renowned speakers, artists, facilitators, and teachers from outside the orchestra field to promote dialogue; identify values and norms; understand organizational myths, behaviors, and culture; conduct systems analysis; contemplate the nature of leadership and the structures that encourage it to emerge; and encourage creative teamwork.

To demonstrate how slow the work can be, it has taken us three years to get to a point where participants no longer object to those who come to the Orchestra Forum with alternative language to describe familiar practice. As institutions (please excuse the generalization), orchestras have not been particularly adaptable. Our systems are rigid, and our practices are entrenched and often antiquated. We are resistant to seeking solutions, learning, or models from outside the field, hiding behind our particular uniqueness and preferring to be precious instead of curious. We are also woefully ignorant of forward-thinking literature about organizational behavior, creativity, leadership, and change, and we are negligent in bringing a theoretical analysis to our own daily operations, finding it easier to do things as we have always done them because such behavior is safe and predictable, even if it is not rewarding and does not maximize organizational performance.

The Orchestra Forum's goal has been to broaden the landscape, to provoke questioning, and to test organizational myths and practices whenever possible. How stimulating might our institutions be if *nothing* were assumed, save service to the art form, quality of performance throughout the organization, and meaningful, rewarding work for all involved? The question we find ourselves asking in this context is, "Can we preserve our wonderful musical traditions while freeing ourselves from the conventions that limit thinking and possibilities, isolate us from our communities, distance us from our artistic centers, and ultimately risk making us irrelevant in a rapidly changing world in which musical innovation is more likely found in other places?"

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The experience of the Orchestra Forum, including a discussion of progress and remaining challenges, is contained in my interim report to foundation trustees, which can be found on our website at < www.mellon.org >, along

with the original document outlining the research that led to the program. Briefly, those accomplishments (what is observable among participating orchestras) and challenges are as follows. Some of the achievements are radical and some are simply tactical adjustments, but *together* they represent an agenda for continued work toward meaningful change.

Progress

- ◆ There is more substantive discussion of institutional values, vision, and strategy, as well as a greater effort to understand the relationship of values to artistic identity and organizational culture.
- ◆ There is a growing sophistication about how to shape organizational culture and a greater desire for organization-wide coaching and learning.
- ◆ There is broader involvement from all constituents in discussion of organizational and artistic issues. In particular, there is a growing respect for the value of musician input, as well as new mechanisms for encouraging participation, rewarding involvement, and providing ongoing professional development in order to strengthen individual commitment and ability.
- ◆ Individuals are feeling more empowered than before, and this is leading to greater participation, organizational and personal enrichment, behavioral change, and an emerging sense of individual responsibility for institutional artistic success.
- ◆ There is more discussion about the value of risk-taking, as well as a general sense that a better way to do things not only exists, but is attainable.
- ◆ Improved communication, dialogue, and cross-constituent work have enabled orchestras to better manage crisis.
- ◆ Enriched planning, more deliberate consideration of community needs, greater involvement of musicians, and more discussion of artistic issues suggest a tentative, but increasing, alignment of artistic initiatives with organizational goals.
- ◆ Orchestras are becoming learning organizations. They are developing an understanding of the value of investing in process to reach important decisions; an appreciation of the time required to change traditional patterns and to build sufficient trust to change organizational culture; a respect for the contributions each constituency can make, as well as the unique perspective each brings to the process; a realization that talk does not necessarily lead to action in the absence of strong leadership; and an awareness of the necessity to manage often diverse and complex expectations in order to be successful.

Challenges

- ◆ An inclusive process is slow, difficult, and messy. The higher the knowledge and awareness, the higher the anxiety.
- ◆ Change is hard. Myths seem impossibly intractable, and in organizations without a strong learning culture, they threaten to undermine good work being done.
- ◆ Participants in the Orchestra Forum have trouble transferring information and learning to their colleagues at home.
- ◆ Achieving alignment between cooperative processes, such as those undertaken as part of the grants, and more traditional processes, such as labor negotiations, is difficult.
- ◆ Most music directors continue to be uninvolved in the process.
- ◆ Creating conditions that stimulate leadership is difficult to sustain when constituencies are unable to let go of traditional roles or to share control.
- ◆ Musicians who assume non-traditional leadership roles must often contend with union distrust and skepticism.
- ◆ The current economic climate is testing the resolve of orchestras to continue such complex and challenging work as pressure to solve short-term financial problems gets in the way of adaptive change meant to achieve long-term results.

The Mellon Foundation's orchestra program is a work in progress, and we have only just begun to undertake some of the most substantive artistic work originally imagined. We have many more questions than answers. Yet the positive results are encouraging, and they provide us with a firm basis for our agenda over the next three years. Specifically, our experience has led us to believe even more strongly that:

- ◆ A high-performance, collaborative culture in which standards of responsibility and excellence resonate through all constituencies maximizes institutional creativity, responsiveness, and performance, both on stage and off.
- ◆ The development of skill sets and ongoing training are necessary to support an organization's capacity to build these working relationships. Involvement builds commitment when systems of reinforcement and training are in place.
- ◆ Personal leadership, including vision and critical thinking, is crucial. Individual talent is not enough. There must be systems in place to foster effective and ongoing dialogue, and it is the responsibility of leaders to develop them.

- ◆ Each constituency must raise its own capacity to provide leadership and guidance within its own group if it hopes to influence and shape organizational performance, long-term vision, or institutional policy.
- ◆ The relationships that are built among constituencies in an effective organization depend on core values and joint aspirations.
- ◆ Opportunities for the interchange of ideas and experiences overcome isolation.
- ◆ Organizations must conduct continued self-assessments and have clear ideas of how to measure their success.
- ◆ Different models can succeed, and orchestras need to be encouraged to think independently.

Change is upon us whether we like it or not. In 50 years, the country's demographics will be completely different. Population centers will shift. Money will be in different hands. Models and practices that were designed 100 years ago will no longer serve us effectively. This may, in fact, be the most inspiring, interesting, challenging, and exciting time in our long and auspicious history. How will we respond? And what legacy will we leave for those who follow us?

We challenge you to make no decision because it is the easy one. Easy decisions *close* doors, but choosing the difficult path or pursuing the big idea leads to growth and opens doors to possibilities we might never otherwise imagine.

Catherine Maciariello is a program officer of the Andrew W. Mellon Foundation.