

Youth Music Diversity, Equity & Inclusion (DEI) Pre-College Pipeline Conference Call
Thursday, December 6, 2018
12:00-1:00pm

In Attendance:

Walter Bitner, Nashville Symphony
Rebecca Bogers, New England Conservatory
Angelica Cortez, Los Angeles Philharmonic
Karen Cueva, Carnegie Hall
Netanel Draiblate, Annapolis Symphony Orchestra
Carol Dunevant, Cincinnati Symphony Orchestra
Helen Eaton, Settlement Music School
Charlie Grode, Merit School of Music
Fiona Harvey, Association of British Orchestras
Corinne Horvath, Richmond Symphony
Denise Kinney, Musicopia and Dancing Classrooms Philly
Susan Lape, Chicago Youth Symphony Orchestras
Patrick Nugent, Annapolis Symphony Orchestra
Jerrod Price, Cleveland Institute of Music
Jessica Schmidt, Orchestrate Inclusion
Stanford Thompson, Play On Philly
Christine Witmer, New England Conservatory
Abigayl Venman, The Sphinx Organization
Najib Wong, Settlement Music School

M I N U T E S

1. Walter Bitner opened the meeting and welcomed the group.
2. Call Overview and Goal – Stanford Thompson
 - a. The goal of the conversation today is about explaining and answering questions concerning the briefing paper and describe the existing collaborative opportunities for programs working with pre-college musicians of color. This will not be a discussion about the details of forming an association, rather a chance to talk about the mechanism of a national collaborative and gauge the level of interest in creating an association/continuing together.
 - b. Stanford Thompson bio: Stanford is a product of the Atlanta Symphony Orchestra Talent Development Program which was established 25 years ago with the specific mission of preparing talented Black and LatinX for admission into the country's top music schools and conservatories. He studied trumpet at The Curtis Institute of Music, performed professionally and went on to establish an El Sistema-inspired program in 2010 that serves almost 500 students on a daily basis, employs 25 Teaching Artists and a professional staff of 12 full-time people. He is a founding member of the Philadelphia Music Alliance for Youth and formally consulted/advised the Boston BEAM and Chicago Musical Pathways initiatives that recently was awarded over \$6M of funding from the Mellon Foundation. He serves

as the Dean of the new Sphinx LEAD (leadership) program and was the Founding Board Chairman of El Sistema USA.

3. Briefing Paper Overview (Briefing Paper attached here) – Stanford Thompson
 - a. It is common for organizations to realize that if they work together there might be opportunities as a collective that they can not experience alone, i.e. mutual learning, mutual advocacy, mutual garnering of funds, mutual development and growth.
 - b. This is already happening in cities like Philadelphia, Chicago and Boston and between cities like Nashville and Atlanta.
 - c. The briefing paper outlines the opportunities for us to gather and gain national attention, funding, expertise, and shared learning by coming together and details how the association will speak on behalf of everyone. The association would be governed and led by policies set by participating organizations themselves.
4. Bridge Concept Overview (Updated Bridge Concept attached here) – Stanford Thompson
 - a. In collaboration with the New World Symphony, Stan worked with colleagues Shea Scruggs and Weston Sprott to map out the journey any musician takes from the moment they play their first notes to earning tenure in a professional American orchestra. Instead of a pipeline, they envisioned an eight-lane bridge that travels over the pathway forged by musicians of color in order to accommodate the traffic our organizations are creating. The Briefing Paper and the Bridge Concept complement each other.
 - b. The journey is separated into five phases: 1) Entry and Early Years, 2) High School and Pre-College, 3) College/Conservatory, 4) Pre-Professional, and 5) Young Professional.
 - c. For each phase on the bridge, there are five needs that must be in alignment to help propel the musician to the next phase (in no order of priority):
 - i. Psychological and Behavioral Preparation - to mentally prepare musicians of color to navigate obstacles that disproportionately affect them
 - ii. Technical Training - to ensure mastery of the fundamental building blocks of professional musicianship
 - iii. Logistical and Financial - family support and high costs
 - iv. Organizational - Is equity and alignment present in the organizations the musician of color seek to inhabit?
 - v. Talent Identification and Opportunities - identifying, evaluating and recruiting musicians of color
5. Briefing Paper Review
 - a. Ten shared goals are point of departure for conversation:
 - i. Improve the caliber and impact of services delivered by the constituent members.
 - ii. Improve opportunities for member funding and growth.
 - iii. Create a vehicle for shared advocacy in public or private arena.
 - iv. Save costs through creation of economies of scale.
 - v. Promote shared standards of operational performance.
 - vi. Expand public awareness and branding.
 - vii. Create opportunities for shared learning and evaluation.
 - viii. Create efficient organizational vehicles for shared action.
 - ix. Effectively and efficiently mediate differences.
 - x. Create platforms for engagement of differing kinds of constituent members.

- b. Basic building blocks of associations - Stan noted that we are not yet certain that we need to create another collective. If yes, there would be a period of six months to draft and vet components such as guiding principles, membership, mission, name, rules of governance. Building blocks:
 - i. Membership
 - ii. Leadership
 - iii. Administration
 - iv. Governance
 - c. Steps to ensure that as many ideas as possible are considered while creating an organization profile:
 - i. Sharing information
 - ii. Conduct a drafting meeting over two days
 - iii. Have people committed by the end of the meeting
 - iv. This process will take a tremendous amount of work and collaboration. The Philadelphia collective is already seeing wonderful results.
 - d. Comments/Questions
 - i. Patrick Nugent: Question - Is there a reason not do this under the umbrella of The League? Answer – A new non-profit may not need to be created. It would be great if a partner presented itself that everyone can agree on.
 - ii. Denise Kinney: Comment – In Musicopia’s experience, combining organizational efficiencies gives a huge boost to sustainability. Response – Agreed. Though a collective does not necessarily mean “cost savings.” We would need to be smart about decision-making.
 - iii. Rebecca Bogers: Comment – We could not be doing this work in Boston now without the help of Philadelphia. We need to be sure that we do not duplicate work. Together we can move forward much faster.
6. Next Steps
- a. The most time intensive part of this process will be attaining buy-in and clarity.
 - b. There will be a series of conference calls for this next work. Today’s call is not about details.
 - c. Minutes will be distributed.
 - d. After the series of conference calls, an in-person meeting will be scheduled to create guiding documents to help put the collective into motion, i.e. implementation plan, infrastructure. This will take place early summer, late fall.
 - e. There is a major national funder interested in seeing what we produce with a possible gift between \$500K - \$2M.
 - f. We will also need to consider how conservatories need to support this effort.
 - g. Rebecca Bogers: Question – Would it be helpful for us to create and circulate a list of questions and concerns that we should be responding to? Response – Stan agrees. The January call and the Sphinx Conference will also be opportunities to further discuss questions/concerns. Stan will create a Google doc and circulate on the Air Table platform.
 - h. Fiona Harvey: Question – Is it better to keep this effort as a network as opposed to a formal organization? Response - We will add this to the list of questions. Stan commented that either way, he is certain we will continue the informal relationship and sharing that has been happening for years.
 - i. We will create an additional document to store answers/decisions to the questions/concerns. We will be working to create a clear pathway forward.

- j. Walter Bitner: FYI - The Nashville Symphony's computer network has been compromised by hackers, therefore new, intensive security has been put in place. Many of Walter's emails are going to spam. If he does not respond to an email in a reasonable amount of time please follow-up with him.
- k. Walter Bitner: Comment – We want to be sure that the collective allows the members to continue to pursue their own agendas. How do we maintain the integrity of a network but still include all and allow voices to be heard? Response – Perhaps having core and auxiliary members is a way to accomplish this balance.
- l. Charlie Grode: Comment – Let's go through the process and the process will play itself out. Let's not be dissuaded by the daunting nature of the work.

Next Conference Call: January 10, 2019

Case for Founding

When a significant number of individual organizations believe that they can create added value by working together to achieve shared goals, they often form into a special kind of coalition known as a Business League (aka “Professional” or “Trade” Association). Such professional organizations are typically organized to promote one or more of the following shared goals:

1. Improve the caliber and impact of services delivered by the constituent members;
2. Improve opportunities for member funding and growth;
3. Create a vehicle for shared advocacy in public or private arenas;
4. Save costs through creation of economies of scale;
5. Promote shared standards of operational performance;
6. Expand public awareness and branding;
7. Create opportunities for shared learning and evaluation;
8. Create efficient organizational vehicles for shared action;
9. Effectively and efficiently mediate differences;
10. Create platforms for engagement of differing kinds of constituent members.

If such a coalition were formed by a group of music education and presenting organizations (hereafter referred to as the National Pre-College Pipeline Programs Network), examples of the goals outlined above might include:

1. Improve the caliber and impact of services delivered by the constituent members;
 - a. Shared libraries of curriculum and activities;
 - b. Shared training programs on cultural competency and strategic guidance on creating new diversity and inclusion initiatives;
2. Improve opportunities for member funding and growth;
 - a. Joint applications to large national funders (such as Mellon and Ford Foundations) that would not normally fund smaller entities;
 - b. Creation of a “start-up” fund which could help with the incubation costs of new initiatives;
 - c. Evaluating the local landscape for most logical and potentially fertile locations for new programs;
 - d. Evaluate requests by communities for strategic expertise relative to start-up and potential partnership opportunities;
3. Create a vehicle for shared advocacy in public or private arenas;
 - a. Shared advocacy for new policies (at the music camp and collegiate levels) that will foster musicians of color interests;
 - b. Create a unified voice advocating for new sources of philanthropic funding;
4. Save costs through creation of economies of scale;
 - a. Musicians participating in multiple initiatives across the country (for example, summer camps);
 - b. Organizations leveraging their human and financial resources reserved for

- similar activities;
- c. Joint purchasing of instruments, consulting and evaluation services;
- d. Shared use of common data software platforms;
- 5. Promote shared standards of operational performance;
 - a. Establishment of voluntary standards of operation that can be verified and lead to expanded funding and support (a so-called “certification process”);
 - b. Promulgation of “best practices” that lead to improved outcomes
- 6. Expand public awareness and branding;
 - a. Template website, brochure, and grant development;
 - b. Shared public awareness campaigns;
 - c. Shared publication of communication tools;
 - d. Social networking campaigns.
- 7. Create opportunities for shared learning and evaluation;
 - a. Shared elements for data collection and outcomes measurement;
 - b. Joint collaboration with major researchers interested in evaluation;
 - c. Libraries of references and data on program efficacy that can be used for local grant applications;
 - d. Support of professional conferences designed to promote organizational growth and learning;
- 8. Create efficient organizational vehicles for shared action;
 - a. Fostering development of specific national collaborations and shared advocacy across the field;
 - b. Development of local and regional learning structures for organizations and communities interested in improving diversity;
 - c. Creating links between programs across different phases of “The Bridge”
- 9. Effectively and efficiently mediate differences;
 - a. Creating an organized and effective way to bring together organizations of different origin, location, target communities, funding sources, size, activities, into shared action
- 10. Create platform for engagement of differing kinds of constituent members.
 - a. Creating an opportunity for shared engagement of youth music organizations, along with universities/conservatories, post-graduate training institutions, professional orchestras, current professional musicians who support diversity and inclusion, supporters of all of the above.

Basic Building Blocks of Associations

Professional associations are created by their core members. A group of likely core members comes together to propose a draft set of guiding principles which are then shared with a much larger group of potential members. Over time, these guiding principles evolve into organizational structures such as the charter, articles of incorporation, and bylaws and guiding principles will evolve into vision, mission, and value statements that allow the new association to be formed and positioned to acquire tax exempt status if not incubated in an existing organization.

Membership

In order to assure that an association is developed in the most powerful and democratic way, core membership should be defined in a manner that engages the largest number of members possible who possess enough shared characteristics to permit them to operate in a reasonably unified way. In other words, if the membership criteria are defined too narrowly, there will be too few members to accrue significant benefits through association; if the criteria are defined too loosely, the membership will not be able to come to consensus on priorities and actions.

Membership is typically defined as at least “core” and “auxiliary”. In other words, the association would have at its core, the organizations that are doing comparable work (i.e. mentoring and training musicians) and would be largely owned and governed by these organizations. The core organizations would grant membership rights to the “auxiliary” organizations in a manner that most facilitated their shared work, (for example, organizations might have shared rights to participate and vote on committees designing and implementing performance related activities, but might not have the right to vote on who could/or could not be the next president of the board; friends of the coalition might have the right to attend conferences and get mailings, but not have voting rights). In this manner, “classes” of members are typically defined and each class of members has a logical set of membership rights granted to them by the core.

Leadership

The association is owned by all its members and under the rules outlined in the bylaws, the membership typically elects a Board of Directors (or Steering Committee) that is at least majority-comprised of representative core member organizations. The association may decide to allow non-core members on the board as well and the number and nature of these additional board members are also specified by the by-laws. So, for example, it is not uncommon to allow the Executive Director of the association (the association’s paid administrative leader) to have a voting seat on the Board; it is not uncommon to have specific institutional partners named as having the right to appoint a representative to the board. However, at least majority control is maintained by core members.

Administration

Associations are usually developed by volunteers (most commonly core members) who then hire, as soon as possible, paid staff. One of the traditional roles of the board is to hire, supervise, and routinely evaluate an Executive Director, who then hires additional staff and operates the association in conformance with board wishes and approved budget.

Governance

The Board (or steering committee), usually working in committees, will then set about the on-going work of serving the membership by establishing strategic priorities such as those outlined at the beginning of this brief, overseeing and participating in the execution of these strategies, ensuring that the association is delivering the mission outlined in its

Articles of Incorporation, and that it is financially sound and meeting all financial requirements of the IRS and all funding bodies.

The board members themselves are usually elected by vote of the entire membership and board leaders are elected by the board or the membership, depending on the bylaws.

Initial Steps for Interested Parties

The following will outline a possible series we could take to begin development of the association. However, before discussing tactics, it is important to note a few principles that are usually helpful in such an endeavor.

Guiding Principles

First, the goal should be to create a “big tent”, meaning the type of core membership previously described that is as large and inclusive as possible, while being limited to agencies that can reasonably be assumed to have fairly aligned work and goals. Concerns about inclusion of organizations that do not share the same core work, or inclusion of individual/non-organizational members, can be readily addressed by broadening the “big tent” with further levels of membership designed for additional interested parties.

In order to develop the “big tent”, care should be taken to use development terms that are inclusive. Neutral terms standing as proxy for the name of the association, for example, are recommended during the development process so that issues regarding who is/is not within the tent can be prescribed by group process and not biased ahead of that process.¹

The development process itself should be open and inclusive. Individual organizations are not likely to join a membership organization perceived to have been developed by a cabal or small group of perceived “insiders”. In a membership organization, all members are owners and insiders and therefore must be included (as much as feasible) in all stages of the development process. Therefore, strategy for association development, planning meetings and their minutes, development documents- in short, all steps of the organization process, should be kept completely transparent and open to input.

There should be no preconceived notions or commitments by anyone in the planning process about any individual or organization’s future role in the association. Such notions or commitments completely negate the power of the association itself and engender distrust in its development. All parties must come to the development table willing to accept the final decisions of the membership regarding the future leadership and membership of the organization. Therefore, no agent in the development process should be surfaced as a putative board officer, board member, executive director, or membership organization; no partner organization may be promised any particular role in the future organization until the membership as a whole agrees.

¹ For example, some potential organizations might initially rule themselves out of participation if certain terms were used before the group as a whole could decide the membership it was seeking.

Possible Initial Development Steps

There are many completely legitimate paths to development of a coalition, however most organizations of this nature begin with a group of interested parties sharing similar core membership qualities coming together to share their interest in the potential formation of a coalition. This group, ideally, would represent some of the variability inherent in potential core members' business models, constituencies, ownership structures, geography. Usually this type of development group is fewer than twenty volunteers and its primary goal is to:

1. Bring about a future convening (physical, telephonic, or digital) of as many of the potential core members as possible;
 - a. Assure the convening is well-represented by diverse organizations;
 - b. Assure that the convening is openly advertised, transparent, and inclusive.
2. Develop for the convening, a "Point of Departure" document, outlining:
 - a. The desires of the group to create a coalition,
 - b. The reasons for the development of the coalition,
 - c. A proposed process for moving beyond the convening to actually develop such a coalition;
 - d. The basic principles of operation under which the successor steps will be conducted (e.g. nature of communications and oversight between future developers and the larger group).

During the convening, reactions are obtained to all the points above and approval is solicited to move ahead.² Convening members should indicate their future willingness to participate in/support the development of the Coalition. The larger group should decide any and all principle parties who will act on behalf of the larger group; it should not be presumed that the initial development group will become the second-stage "Coalition Development Group".

Then, after the convening, the newly endorsed "Coalition Development Group" should move on to develop guiding principle documents that would include definitions of proposed membership, auxiliary membership, board structure, key elements of governance, and organization management. All these guiding documents would be circulated to the larger membership for input and approval until they could be finalized as the By-laws.

Most of this development work is done on a voluntary basis by the "Coalition Development Group" and other volunteers. Sometimes the work is partially funded by small philanthropic contributions or contributions by future members.

Once founding documents are approved, members then officially join the Coalition, board elections are held and officers named as specified in the by-laws and all official

² Such convenings are typically facilitated by an able and objective party who can make sure that deliverables are assured and conversations are inclusive.

National Pre-College Pipeline Programs Network

Suggestions for Action - CONFIDENTIAL DRAFT

Prepared by Stanford Thompson – September 2018

incorporation papers are filed. Among the early next steps for the new board is development of funding requests to obtain seed capital for staff.

Summary

Although these steps may seem extensive and onerous, it is important to remember that professional coalitions, leagues, networks, associations, are developed all the time. Almost all business sectors (both non-profit and for-profit) and recognized professions have gone through the process of developing them and the reason for this is because they create significant value for members. There are almost 73,000 associations in the US today (National Center for Charitable Statistics 2011) and there is no doubt that the opportunity for the youth musicians of color we serve (and hope to serve!) would be greatly enhanced by our increase of clout, funding, support, community awareness, outcomes, and impact.

	Entry & Early Years Phase 1	High School + Pre-College Phase 2	College + Conservatory Phase 3	Pre-Professional Phase 4	Young Professional Phase 5
Psychological & Behavioral Preparation (a) To mentally prepare musicians of color to navigate obstacles that disproportionately affect them.	Challenge: It is difficult for young people of color to see themselves as professional classical musicians as compared to a professional NFL, MLB, or NBA player.	Challenge: Counselors & parents have limited pre-college knowledge of the process to become a professional musician.	Challenge: Student retention and academic support. Equipping students with the social and organizational vocabulary needed to identify the challenges they face.	Challenge: Training mentors to how to offer holistic mentorship.	Challenge: Matching musicians with the right help at the right time, properly calibrated to their unique professional situation.
	Resource: Role Models; parents, primary instrument teachers, ensemble directors, school administrators; Parent2Parent networking	Resource: Campus Visits; Scholarships; Financial Aid consultations; Application consultants; Summer Music Festivals ; Family Engagement and Support;	Resource: Early access to career planning; Reading Lists; Professional Development programs; Summer Music Festivals; Programs like Posse could be re-purposed to a classical context.	Resource: Mentor matching; placement in Fellowships; graduate programs;	Resource: Mentors; fellow musicians; Music Directors; Executive Directors; Personnel managers; sports psychologists; Professional Development programs
Technical Training (b) To ensure mastery of the fundamental building blocks of professional musicianship	Challenge: Systematically identifying so many students to provide music study or supplementary music coaching (May have to limit scope to Sistema programs)	Challenge: Liability hurdles exist for bringing together High School students for coaching programs.	Challenge: Getting buy-in from all stakeholders at the institutional level (faculty, staff, administration)	Challenge: Coverage in this area is strong. Challenges are to align this Phase with phases that precede and follow it .	Challenge: The learning curve of a professional orchestral schedule is steep
	Resource: Lessons and fundamentals early on; Summer Festivals	Resource: Audition preparation; Summer Festivals and Pre-College programs	Resource: Professional audition preparation; Summer Music Festivals; Ear Training	Resource: Intensive audition preparation; 1 on 1 sessions; mock auditions, etc.	Resource: Mentors continue professional development; fellow musicians providing frequent and specific feedback
Logistical & Financial (c) Costs, Scheduling	Challenge: Financial constraints can manifest directly and indirectly (as in the form of parental involvement).	Challenge: It is costly to make college visits, attend auditions and get informed, timely consultation about on selecting a college/conservatory.	Challenge: Resources must complement--but not replace--those provided by colleges/conservatories.	Challenge: Auditions are costly in terms of time, travel expense, access to coaching/preparation resources	Challenge: Survey and Questionnaires required to determine challenges
	Resource: Funds to help with instrument purchases, Lessons, exposure to experiences.	Resource: Audition stipends; Audition by Consortium; Family Engagement and Support; Parent2Parent networking;	Resource: Support for instrument upgrades; travel resources	Resource: Travel, lodging, instrument, resume support	Resource: Mentors; Personnel Managers
Organizational (d) Is equity and alignment present in the organization the musicians of color seek to inhabit? How can those organizations be supported?	Challenge: The needs of Sistema inspired programs and school music programs vary so one size will not fit all. Preference for monetary or in-kind donations depends on the organization and context.	Challenge: Applicants of color get lost in the application process view as viable recruitment prospects from an enrollment/financial aid perspective? Offset the counterintuitive effects of tuition discounting	Challenge: Shared governance and tuition discounting complicate efforts to recruit and enroll students of color.	Challenge: The audition paradigms (unscreened finals) and overall recruitment practices in the field undermine diversity and inclusion efforts.	Challenge: Many orchestras lack a Human Resources manager. Has unconscious bias and/or inherent racism been discussed at the organizational level?
	Resource: Sistema programs; Public, private, charter schools; Funders: Large Foundations, Corporate, Private Donors, Smaller Foundations can structure gifts and grants such that organizations effectively prioritize alignment with diversity	Resource: Admissions officers; Administrators; Funders: Large Foundations, Corporate, Private Donors, Smaller Foundations can structure gifts and grants such that organizations effectively prioritize alignment with diversity	Resource: Mentors; Faculty and Administrative advisors Funders: Large Foundations, Corporate, Private Donors, Smaller Foundations can structure gifts and grants such that organizations effectively prioritize alignment with diversity	Resource: Music Directors; League of American Orchestra ; Orchestra managers, staff, Boards; Orchestra committees/CBAs; Funders	Resource: Corporate, Music Directors, Boards, Orchestra Committee/CBAs; Funders
Talent Identification & Opportunity (e) Identifying, evaluating and recruiting musicians of color	Challenge: Marketing new opportunities to large and diverse populations is challenging.	Challenge: Marketing new opportunities to large and diverse populations is challenging.	Challenges: Retention; identifying when a student is struggling. Intervention and support on a time horizon that is meaningful to the student.	Challenge: Recruitment practices are minimal industry wide—applicants come to them. Orchestras/Colleges struggle to recruit.	Challenge: Musicians who come through the pipeline must continue to help nourish it.
	Resource: Sistema programs; All-State, All-County music programs; State Music Educator Associations; Magnet Schools; Summer Music Festivals	Resource: College Fairs; High School music rosters; Sistema Programs; Sphinx Competition; NASM (National Association of Schools of Music) & ICCAM (International Consortium); Pre-College programs (Juilliard, Bard, New England, Curtis, etc...)	Resource: Faculty, Administrators; Academic advising resources	Resource: League of American Orchestras; College/Conservatory; Individual orchestras	Resource: Musicians of Color begin to mentor their younger colleagues.