

# National Instrumentalist Mentoring and Advancement Network Convening

Hosted by



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PAUL M. ANGELL  
FAMILY FOUNDATION

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**Play On Philly**

**November 15 & 16, 2019**  
**Cincinnati, OH**

# Event Information

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## Photography:

**Mark Lyons**  
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## Catering:

**Kate's Catering**

### Friday Night Dinner:

**Transept**  
1205 Elm St  
Cincinnati, OH 45202

## Performances:

### Friday – Opening Luncheon

**Daniel Dorsey**, cello (Nouveau)  
**Jacob Miller**, piano

### Saturday – CSO American Life Concert

**Thomas Wilkins**, conductor  
**Louis Schwizgebel**, piano

## Thanks to:

**Jonathan Martin**, President, CSO  
**Robert McGrath**, Vice President and  
General Manager, CSO  
**Hannah Johnson**, Director of Special Events  
**Kelly Barefield**, Intern  
**Jobelle Mesa**, Intern

### CSO Education and Community Engagement Staff:

**Ahmad Mayes**  
**Carol Dunevant**  
**Becky Spiewak**  
**Tiffany Cooper**

Dear Friends of NIMAN:

Since I was twelve years old, I wanted nothing more than to become a principal trumpeter in a major American orchestra. Participating in summer programs like Interlochen Arts Camp, receiving support from programs like the Atlanta Symphony Orchestra Talent Development Program, and making lifelong friends in ensembles like the Atlanta Youth Wind Symphony helped inspire me to become the best trumpet player I could.

However, my postsecondary school experiences shed light on how far the goal post actually was when all of my advancement and mentoring opportunities were not in alignment. The support structures I had were not adequate for the new challenges I faced as a student in a demanding conservatory environment. While I received the best education available in our field, there were still obstacles I could not overcome.

In countless discussions with my colleagues of color who have successfully traveled the entire span of the bridge, the common thread through their experiences is the marriage of hard work in the practice room and consistent shepherding by organizations and mentors through challenges that affect musicians of color disproportionately from their white counterparts.

I believe by finding ways for organizations and mentors to align their resources and share common goals, we can together create a level playing field for all musicians. Thank you for joining this important conversation in Cincinnati and for your continued partnership in the years to come.

Sincerely,



Stanford Thompson

Volunteer, National Instrumentalist Mentorship and Advancement Network

Founder & Executive Director, Play On Philly



# Schedule of Events

## Friday, November 15

## WILKS STUDIO

- 11:30 AM Check-in
- 12:30 PM Opening Luncheon
- 12:40 PM Welcoming Remarks *Jonathan Martin*  
*Tchaikovsky* Pezzo Capriccioso Op. 62  
*Daniel Dorsey*, cello
- 12:55 PM Remarks *Stanford Thompson*
- 1:20 PM Break
- 1:30 PM Keynote Speaker *Thomas Wilkins*
- 2:00 PM Panel Discussion: Exploring the “Bridge”  
*Denielle Wilson*, cellist, CSO/CCM Fellow, ASO TDP alumnus  
*Chaz Salazar*, flutist, CCM AD student  
*Ian Saunders*, double bassist, CSO/CCM alumnus  
*Ahmad Mayes*, facilitator
- 3:00 PM Group Photo & Break
- 3:30 PM Working Session 1
- 5:30 PM Break
- 6:30 PM Cocktails & **TRANSEPT**
- 7:15 PM Dinner 1205 Elm St, Cincinnati, OH 45202

## Saturday, November 16

## CORBETT TOWER

- 8:45 AM Continental Breakfast
- 9:30 AM Working Session 2
- 12:30 PM Lunch on Your Own
- 2:00 PM Working Session 3
- 4:30 PM Ratification of Plans for Association
- 5:30 PM Dinner on your own
- 8:00 PM Concert

# Keynote Speaker: **Thomas Wilkins**



Thomas Wilkins is Music Director of the Omaha Symphony; a position he has held since 2005. Additionally, he is Principal Conductor of the Hollywood Bowl Orchestra, the Boston Symphony's Artistic Advisor, Education and Community Engagement, and holds Indiana University's Henry A. Upper Chair of Orchestral Conducting established by the late Barbara and David Jacobs as a part of that University's "Matching the Promise Campaign." Past positions have included resident conductor of the Detroit Symphony and Florida Orchestra (Tampa Bay), and associate conductor of the Richmond (VA) Symphony. He also has served on the music faculties of North Park University (Chicago), the University of Tennessee in Chattanooga, and Virginia Commonwealth University in Richmond.

Devoted to promoting a life-long enthusiasm for music, Thomas Wilkins brings energy and commitment to audiences of all ages. He is hailed as a master at communicating and connecting with audiences. Following his highly successful first season with the Boston Symphony, the Boston Globe named him among the "Best People and Ideas of 2011." In 2014, Wilkins received the prestigious "Outstanding Artist" award at the Nebraska Governor's Arts Awards, for his significant contribution to music in the state while in 2018 Thomas Wilkins received the Leonard Bernstein Lifetime Achievement Award for the Elevation of Music in Society conferred by Boston's Longy School of Music. And in 2019 the Virginia Symphony bestowed Thomas Wilkins with their annual Dreamer Award.

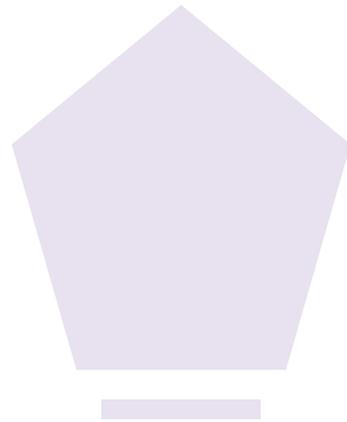
During his conducting career, he has led orchestras throughout the United States, including the New York Philharmonic, the Chicago Symphony, the Los Angeles Philharmonic, the Cincinnati Symphony and the National Symphony—all of which he returned to guest conduct in 2019. Additionally, he has guest conducted the Philadelphia and Cleveland Orchestras, the Symphonies of Atlanta, Dallas, Houston, Baltimore, San Diego and Utah, and the Buffalo and Rochester Philharmonics, as well as at the Grant Park Music Festival in Chicago.

His commitment to community has been demonstrated by his participation on several boards of directors, including the Greater Omaha Chamber of Commerce, the Charles Drew Health Center (Omaha), the Center Against Spouse Abuse in Tampa Bay, and the Museum of Fine Arts as well as the Academy Preparatory Center both in St. Petersburg, FL. Currently he serves as chairman of the board for the Raymond James Charitable Endowment Fund and as national ambassador for the non-profit World Pediatric Project headquartered in Richmond, VA, which provides children throughout Central America and the Caribbean with critical surgical and diagnostic care.

A native of Norfolk, VA, Thomas Wilkins is a graduate of the Shenandoah Conservatory of Music and the New England Conservatory of Music in Boston. He and his wife Sheri-Lee, are the proud parents of twin daughters, Erica and Nicole.

# Keynote Performer: **Daniel Dorsey**

Daniel Dorsey , cellist, age 16, has been a member of CSYO Nouveau Pre-Conservatory for three years. He started playing cello at the age of nine and studies privately with Dr. Sarah Kim, Executive Director of the Cincinnati Young Artists and coached by Alan Rafferty, cellist with the Cincinnati Symphony Orchestra. Currently, Daniel is co-principal cellist of the Cincinnati Symphony Youth Orchestra Philharmonic. He has been a recipient of the CSO Norman E. Johns Chair Award (2017-2018 and 2018-2019). During the summer, he has attended the Sphinx Performance Academy, Green Mountain Chamber Music Festival, and Bowdoin International Music Festival. Daniel's most recent accomplishments include earning principal seat for the Ohio Music Educators Association (OMEA) Southwest Regional Orchestra - Fall 2018 and being one of the youngest high school students to qualify for OMEA All State Orchestra - Spring 2019 and 2020. Daniel was recently named Winner of the David Pierson Concerto Competition and will make his solo debut with the Dayton Philharmonic Orchestra in Oct. 2019. He has appeared in masterclasses with renowned cellists Allan Harris, Hans Jorgen Jensen, and Brannon Cho. He is currently a junior at St. Xavier High School earning first honors and awarded outstanding math student in his class. Daniel plans to pursue a college degree and career in music.



## Panelist: **Denielle Wilson**



Denielle Wilson, 23, is a cellist from Lithonia, Georgia. She completed an undergraduate degree at Northwestern University in 2017, having majored in cello performance and music education. Her musical mentors have included Hans Jørgen Jensen, Joel Dallow, and Nan Kimberling. She has spent summers at the Meadowmount School of Music, Bowdoin Music Festival, Aspen Music Festival and School, and the Grant Park Music Festival. She plays in a piano trio with her siblings, and they enjoy sharing classical and religious music with their local community.

## Panelist: **Chaz Salazar**



Mexican-American flutist Chaz Salazar has served as the flute instructor for Harmony Project Phoenix, a non-profit music program inspired by Venezuela's esteemed *El Sistema* youth orchestra program. Chaz received his early formal musical training from a similar program called Rosie's House: A Music Academy for Children which provides free music lessons to under-resourced youth. He has maintained an active performance schedule throughout the greater Phoenix area as a part of the in-home chamber music series, *An Evening of Music* and served on the board of the Arizona Flute Society for 6 years. Recently, Chaz has been the recipient of audition grants from the National Alliance for Audition Support (NAAS) through the Sphinx Organization. The NAAS is an unprecedented initiative to increase diversity in American orchestras by providing Black and Latinx musicians mentoring, audition preparation, financial support, and audition previews.

A civically-minded and community-engaged musician, Chaz believes in the power of music as a catalyst for positive social change. He earned both his Bachelor's and Master's degrees in Flute Performance from Arizona State University, the latter degree as a Reach for the Stars Fellow. Chaz is currently attending the Cincinnati Conservatory of Music (CCM) in the Artist Diploma program under the mentorship of Demarre McGill, Principal Flutist of the Seattle Symphony. Chaz's other influential teachers include Judy Conrad, Brian Gordon, Elizabeth Buck, and Marco Granados.

## Panelist: Ian Saunders

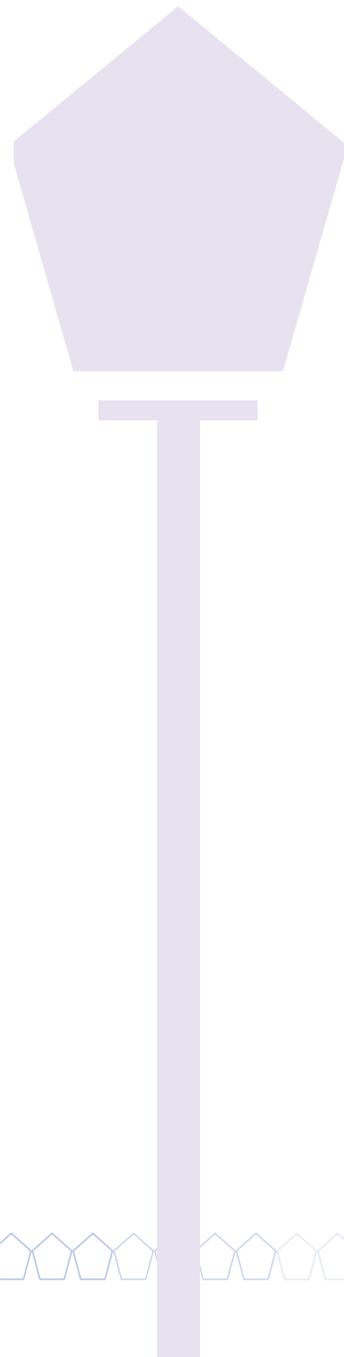
A multi-faceted musician, Ian Saunders enjoys an exciting career as a sought-after bassist and educator. The Virginia native began his studies with Christopher White, principal bassist of the Virginia Symphony, in his hometown of Norfolk. Within a year he received his first major scholarship from R&B legend Ben E. King. Saunders completed his bachelor's degree under the tutelage of renowned bassist Robert Nairn at the Pennsylvania State University. As an undergraduate, he took part in several world premieres by the prolific Finnish composer Teppo Hauto-Aho.

Saunders continued his graduate studies under Nairn while fulfilling numerous professional engagements with the Williamsport Symphony, Penn's Woods Festival Orchestra, Ballet Theatre of Central Pa and Manassas Ballet Theatre bass sections. In addition, he served as principal bassist of the Penn Centre Orchestra, Nittany Valley Symphony and Altoona Symphony.

In 2016, he received his doctorate from the University of Maryland while studying with Robert Oppelt, principal bassist of the National Symphony Orchestra. Saunders is currently in demand within the competitive Baltimore and DC freelance community, most notably as the bassist for the critically acclaimed Post-Classical Ensemble. In addition, he has also performed with the National Philharmonic and the Collaborative Artist of Baltimore. In March 2016, he was featured on WBJC 91.5 Baltimore performing Guillaume Connesson's Sextuor. Furthermore, he has fulfilled engagements abroad in Canada, Mexico and the Bahamas as well as across America in renowned concert halls including the Kennedy Center, Heinz Hall and Carnegie Hall.

Outside of the classical world, Saunders has been invited to participate in orchestras backing Bootsy Collins, Kansas and hip-hop artist Thee Phantom. He can also be seen in the nationally televised special *Cherish the Ladies: An Irish Homecoming*, backing the Irish super group Cherish the Ladies. The program was nationally syndicated on PBS in 2013.

As an educator, Saunders recently served as the interim double bass professor at Penn State. In addition, he has taught classes at the University of Maryland, Juniata College in Huntingdon, PA, and St. Mary's College of Maryland. Saunders also spends his summers as the Associate Dean of Students at the Eastern Music Festival in Greensboro, NC.



# Participants

Lucinda Ali-Landing	<i>Executive Director</i>	Hyde Park Suzuki Institute
Jamie Allen	<i>Director of Education</i>	Dallas Symphony Orchestra
Emily Wren Baxter	<i>Volunteer</i>	NIMAN
Naimah Bilal	<i>Director of Board Relations</i>	University of Cincinnati Foundation
Pam Blaine	<i>Chief of Education and Community Engagement</i>	
Rebecca Bogers	<i>Dean and Director</i>	Houston Symphony
Abra Bush	<i>Senior Associate Dean of Institute Studies</i>	New England Conservatory Preparatory School
Ann Cushing-Reid	<i>Interim Director Preparatory and Community Engagement Division</i>	The Peabody Institute at Johns Hopkins University
Hilary Dow Ward	<i>Managing Director</i>	University of Cincinnati College - Conservatory of Music
Carol Dunevant	<i>Instructional Programs Manager</i>	Sewanee Summer Music Festival
Angelica Durrell	<i>Founder and Executive Director</i>	Cincinnati Symphony Orchestra
Cassidy Fitzpatrick	<i>Vice President for Musician Advancement</i>	INTEMPO
Joyce Griggs	<i>Executive Vice President and Provost</i>	New World Symphony
Charlie Grode	<i>President &amp; Executive Director</i>	Manhattan School of Music
Emily Heckel	<i>Manager, NSO and Music Education</i>	Merit School of Music
Marshall Hughes	<i>Manager Boston BEAM</i>	National Symphony Orchestra
Jacqueline Jove	<i>Director of Education</i>	Boston BEAM
Joan Katz Napoli	<i>Senior Director of Education and Community Management</i>	Sphinx
Emily Lair	<i>Education Project Manager</i>	Cleveland Orchestra
Andrew Lee	<i>Artistic Director</i>	Los Angeles Philharmonic
James Lee III	<i>Composer/Associate Professor of Theory</i>	DC Strings Workshop
Katherine Drago Luellen	<i>Executive Dean of Enrollment</i>	Morgan State University
Jonathan Martin	<i>President</i>	Interlochen Center for the Arts
Ahmad Mayes	<i>Director of Education and Community Engagement</i>	Cincinnati Symphony Orchestra
Robert McGrath	<i>Vice President and General Manager</i>	Cincinnati Symphony Orchestra
Kimberly McLemore	<i>Director of Education and Community Engagement</i>	
Christopher J. Mossey	<i>VP for Institutional Advancement</i>	Nashville Symphony
Toni S. Paz	<i>Certified Fund Raising Executive</i>	Curtis Institute of Music
Suzanne Perrino	<i>Senior Vice President of Learning &amp; Community Engagement</i>	
Stanley Romanstein	<i>Dean</i>	Pittsburgh Symphony Orchestra
Chaz Salazar	<i>Artist Diploma Student</i>	University of Cincinnati College - Conservatory of Music
Christina Salgado	<i>Equity, Diversity, Inclusion, and Belonging Program Manager</i>	University of Cincinnati College - Conservatory of Music, NIMAN Panelist
Ian Saunders	<i>CSO/CCM Diversity Fellow</i>	
Richard Scerbo	<i>Director</i>	The Juilliard School
Elizabeth Schurgin	<i>Executive Director</i>	NIMAN Panelist
Geoffrey Scott	<i>Director of Music Admissions</i>	National Orchestral Institute
Steven Slaff	<i>Managing Director</i>	DC Youth Orchestra Program
Weston Sprott	<i>Dean of Preparatory Division</i>	Rice University - Shepherd School
Johnnia Stigall	<i>Manager of Pre-College &amp; Pathways Programs</i>	Chautauqua Symphony Orchestra
Adrienne Thompson	<i>Project Director</i>	The Juilliard School
Stanford Thompson	<i>Founder and Executive Director</i>	
Angelica Tran	<i>Coordinator, Artist Training Programs</i>	Cleveland Institute of Music
Henry Valoris	<i>Dean of Performance and Production Operations</i>	Chicago Musical Pathways Initiative
Denielle Wilson	<i>CSO/CCM Diversity Fellow</i>	Play On Philly
Najib Wong	<i>Manager</i>	Carnegie Hall
Karen Yair	<i>Vice President, Knowledge, Learning and Leadership</i>	Manhattan School of Music
		NIMAN Panelist
		Philadelphia Music Alliance for Youth Artists Initiative
		League of American Orchestras

# Bridge Matrix

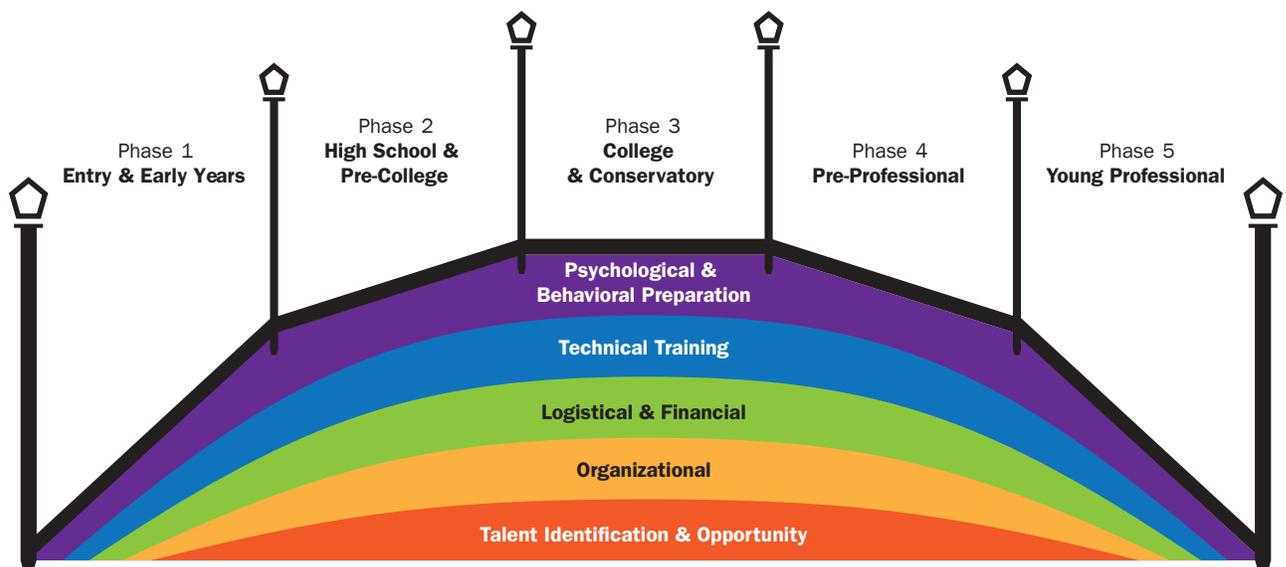
	Entry and Early Years	High School / Pre-College	College / Conservatory	Pre-Professional	Young Professional
<p><b>Psychological &amp; Behavioral Preparation</b></p> <p>To mentally prepare musicians of color to navigate obstacles that disproportionately affect them</p>	<p><b>Challenge:</b> Are there psychological components (as opposed to socio-economic) affecting participation in classical music at this phase?</p> <p><b>Resource:</b> Inspiration/Role Models; Encouragement from parents, primary instrument teachers, ensemble directors, school administrators</p>	<p><b>Challenge:</b> Ineffective/Unintentionally negative Guidance Counselors: Do musicians have access to pre-college advising that empowers rather than dissuades them?</p> <p><b>Resource:</b> Campus Visits; Scholarships; Financial Aid Consultations; Application Consultants; Summer Music Camps</p>	<p><b>Challenge:</b> Retention – Can programs like Posse be re-purposed to our context? Do young musicians have the social/organizational vocabulary needed to identify the challenges they face?</p> <p><b>Resource:</b> Early access to career planning; Summer Music Festivals</p>	<p><b>Challenge:</b> Will mentors themselves have the wherewithal to offer holistic mentorship?</p> <p><b>Resource:</b> Mentor matching; Placement in Fellowships; Graduate programs</p>	<p><b>Challenge:</b> How do we ensure that musicians get the right coaching, at the right time, properly calibrated to their unique professional situation?</p> <p><b>Resource:</b> Mentors; fellow musicians; Music Directors; Executive Directors; Personnel managers; sports psychologist</p>
<p><b>Technical Training</b></p> <p>To ensure mastery of the fundamental building blocks of professional musicianship</p>	<p><b>Challenge:</b> Can students outside of Sistema-inspired programs be systematically reached or would this coaching be limited to Sistema participants?</p> <p><b>Resource:</b> Lessons and fundamentals early on; Summer Camps and Pre-College</p>	<p><b>Challenge:</b> How can this be done efficiently? What liability hurdles exist for bringing together High School students?</p> <p><b>Resource:</b> Audition preparation; Summer Camps and Pre-College programs (Encore String Camp; Curtis Summerfest; Itasca Summer Music Academy)</p>	<p><b>Challenge:</b> Can we get buy-in from all stakeholders at the institutional level (faculty, staff, administration)</p> <p><b>Resource:</b>professional audition preparation; Summer Music Festivals</p>	<p><b>Challenge:</b> Is there new ground to cover here or are existing resources/practices enough?</p> <p><b>Resource:</b> Intensive audition preparation; 1-on-1 sessions; mock auditions, etc.</p>	<p><b>Challenge:</b> How will the learning curve of weekly performances be acclimated? Are there skills that can be developed earlier on the bridge?</p> <p><b>Resource:</b> Mentors continue professional development; fellow musicians providing frequent and specific feedback</p>
<p><b>Logistical &amp; Financial</b></p> <p>To support families and the high costs of pursuing a career as a professional classical musician</p>	<p><b>Challenge:</b> Do we have good data on what it costs to provide musical training from Middle School through High School?</p> <p><b>Resource:</b> What funds exist to help with instrument purchases? Lessons? Is there buy-in from parents?</p>	<p><b>Challenge:</b> Could Admissions teams from various schools come together and audition students of color at the same time?</p> <p><b>Resource:</b> Audition stipends; Audition by Consortium</p>	<p><b>Challenge:</b> How can resources complement instead of replacing those provided by college/conservatory?</p> <p><b>Resource:</b> Instrument support; travel resources</p>	<p><b>Challenge:</b> How much does it cost to take an audition? How many on auditions on average does it take?</p> <p><b>Resource:</b> Travel, lodging, instrument, resume support</p>	<p><b>Challenge:</b> What, if any, additional costs or logistical support do hired musicians of color face?</p> <p><b>Resource:</b> Mentors; fellow musicians; Music Directors; sports psychologists</p>
<p><b>Organizational</b></p> <p>To promote equity in, ensure alignment of and provide support to the organizations the musicians of color seek to participate in</p>	<p><b>Challenge:</b> Given that these programs are the beginning of the bridge, how can we support them most effectively?</p> <p><b>Resource:</b> Sistema programs; Public, private, charter schools</p>	<p><b>Challenge:</b> Do college/conservatories view as viable recruitment prospects from an enrollment/financial aid perspective? Does tuition discounting disincentivize recruitment of these applicants?</p> <p><b>Resource:</b> Admissions officers; Administrators</p>	<p><b>Challenge:</b> Will shared governance and tuition discounting make it difficult for institutions to be responsive to musicians of color?</p> <p><b>Resource:</b> Mentors; Faculty and Administrative advisors</p>	<p><b>Challenge:</b> Does the audition and recruitment process undermine diversity and inclusion efforts?</p> <p><b>Resource:</b> Music Directors; League of American Orchestras; Orchestra managers; staff; Boards; Orchestra committees/CBAs</p>	<p><b>Challenge:</b> Are the review processes transparent enough? What proactive retention programs exist? Many orchestras lack a Human Resources manager. Has unconscious bias been discussed at the organizational level?</p> <p><b>Resource:</b> Music Directors; Boards; Orchestra Committee/CBAs</p>
<p><b>Talent Identification &amp; Opportunity</b></p> <p>Identifying, evaluating and recruiting musicians of color</p>	<p><b>Challenge:</b> How do you market to/communicate with this population? How big is it? 100k-300k students?</p> <p><b>Resource:</b> Sistema programs; All-State, All-County music programs; State Music Educator Associations; Magnet Schools</p>	<p><b>Challenge:</b> How can we reach all of these students? Could a special college fair be organized to make recruitment more efficient?</p> <p><b>Resource:</b> College Fairs; High School music rosters; Sistema Programs; Sphinx Competition; NSM &amp; ICCAM, etc.</p>	<p><b>Challenges:</b> Retention is a challenge: How do we identify when a student is struggling? Can we intervene and support on a time horizon that is meaningful to the student?</p> <p><b>Resource:</b> Faculty; Administrators; Academic advising resources</p>	<p><b>Challenge:</b> Recruitment practices are minimal industry wide—applicants come to them. Can diverse candidates be proactively sought?</p> <p><b>Resource:</b> League; College/Conservatory; Individual orchestras</p>	<p><b>Challenge:</b>How can we ensure that musicians who travel across the bridge continue to help nourish it?</p> <p><b>Resource:</b> Musicians of Color become mentors themselves</p>

# Bridge Plan: Genesis and Overview

## Genesis

In November 2015, Stanford Thompson, Founder and Executive Director of Play On Philly (POP) met with Howard Herring, President and CEO of the New World Symphony (NWS). Aware that American professional orchestras are not addressing diversity and inclusion to their detriment, they began to explore options for changing the situation. After many years of programs, fellowships, millions of dollars spent and countless hours of effort, only 1.8% of the nation's orchestras' musicians are black and 2.5% are Hispanic. By contrast, the nation is growing increasingly diverse: in fact, in many parts of the United States, the term "minority" for populations of color is now statistically incorrect. It stands to reason that diversity on stage and on boards/administration will increase the ability to reach more communities, will expand and diversify their audiences, will potentially provide access to new funding.

In March 2016, NWS Executive Vice President and Provost John Kieser and the Musician Advancement team convened a group of students, administrators and professionals from around the country to discuss solutions. At the League of American Orchestras (LAO) conference in June, a half-day working session was held where Stanford and Howard led a working group that addressed the creation of a national network of organizations working collaboratively to solve diversity and inclusion issues in the field. On September 21 and 22, 2016, the Knight Foundation and New World Symphony convened a meeting of musicians, administrators from best practices of programs, schools of music, orchestras and pre-college music educators. The purpose was to design a national instrumentalist mentoring and audition training initiative that was inspired by the LAO conference sessions on diversity.



# Bridge Plan

At all these meetings, the issues raised could be grouped under the issue of cultural equity. Americans for the Arts describes cultural equity as embodying the values, policies, and practices that ensure that all people—including but not limited to those who have been historically underrepresented based on race/ethnicity, age, ability, sexual orientation, gender, socioeconomic status, geography, citizenship status, or religion—are represented in the development of arts policy; the support of artists; the nurturing of accessible, thriving venues for expression; and the fair distribution of programmatic, financial, and informational resources. Their “Statement on Cultural Equity” of May 23, 2016 stated, “Cultural equity is critical to the long-term viability of the arts sector.”

It became clear at these convening that a solution needed to include two parallel paths. The first is teaching and mentoring the student and training and mentoring the young professional with the goal is to widen the pathway for musicians of color so they can be successful in the field. In essence, building a bridge consisting of phases from pre-student to professional and establishing piers to support the span of the bridge. The second is overcoming inherent and sometimes unconscious racism in orchestras with the goal of creating a level playing field for all musicians. The National Instrumentalist Mentoring and Advancement Network is a call to action – how can your organizations be one of the piers and what can you contribute?

### Concepts

Shea Scruggs, an advocate and participant in all three of the above convening, created a matrix that divided the early life (or the bridge span) of a musician into five pivotal points or phases and each phase into five attributes. This matrix provides the detail and context to the concepts outlined below. It is clear that all institutions involved with the bridge and the pillars that support the span need to work as a networked consortium. The journey across the span from one institution to another is critical in widening the path for talented musicians of color.

### Entry and Early Years – Phase 1

The first pillar is the entry point – In-School and After-School programs, El Sistema programs and community music schools – that provide exposure to classical music and get them started. From these programs, a certain number of musicians will be identified or self-identify for the step into Phase 1. Essential in this phase is the support of the musician’s family and mentors will be encouraged to interact with the families where possible to provide an example of music as a viable career choice. Students should have access to peer support and mentoring groups provided by member organizations.



## Genesis and Overview

### **High School and Pre-College – Phase 2**

A pillar made up of the District/State Ensembles, private junior youth ensembles that these musicians can join to further their experiences, supports this part of the span. During this phase, there is a continuation of the program of Phase 1 with an addition of guidance for post-high school and summer opportunities. Training and preparation for college auditions will be of utmost importance during this phase to ensure that musicians are competitive for entry into the best collegiate programs. In some cases, acquiring a better instrument will help facilitate the musician's development.

### **College and Conservatory – Phase 3**

This phase is one of the most crucial times for musicians to receive a level of training that facilitates their forward momentum towards becoming a professional musician. Our collective goal in this phase is to expand the pool from which top colleges and universities can recruit outstanding young musicians from diverse backgrounds; to help these institutions build more inclusive campus environments so that they can be more welcoming for people from all backgrounds; and to ensure that the musicians persist in their musical studies and graduate so they can be prepared for a professional career.

### **Pre-Professional – Phase 4**

The fourth pillar consists of various programs such as the New World Symphony, Summer Music Festivals like Tanglewood and Aspen, Manhattan School of Music Orchestral Training Program, Sphinx Connect, Chicago Civic Orchestra, Symphony in C, Project Inclusion, National Alliance for Audition Support, etc. The training and mentoring musicians receive from faculty and staff plays a key role in the successful pursuit of professional jobs.

As to the audition process itself, there is a need to keep these completely blind right through to the finals. During the convening of September 2016, there was compelling evidence that those orchestras that have completely blind auditions seem to award more positions to musicians of color.

### **Young Professional – Phase 5**

At each convening, musicians shared their stories of the racial obstacles they had to overcome as students and young professionals. These were in addition to inherent feelings that they needed to be better in every way than their white counterparts. A mistake would count against them far greater than if a white musician had made that same mistake. Obstacles ranged from access to opportunities/socioeconomic situations to outright sabotage.



## Case for Founding

– prepared by Stanford Thompson

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:

- ◆ Improve the caliber and impact of services delivered by the constituent members;
- ◆ Improve opportunities for member funding and growth;
- ◆ Create a vehicle for shared advocacy in public or private arenas;
- ◆ Save costs through creation of economies of scale;
- ◆ Promote shared standards of operational performance;
- ◆ Expand public awareness and branding;
- ◆ Create opportunities for shared learning and evaluation;
- ◆ Create efficient organizational vehicles for shared action;
- ◆ Effectively and efficiently mediate differences;
- ◆ 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:

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

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- ◆ Promote shared standards of operational performance;
  - ◆ Establish voluntary standards of operation that can be verified and lead to expanded funding and support (a so-called “certification process”);
  - ◆ Promulgate “best practices” that lead to improved outcomes;
- ◆ Expand public awareness and branding;
  - ◆ Template website, brochure, and grant development;
  - ◆ Shared public awareness campaigns;
  - ◆ Shared publication of communication tools;
  - ◆ Social networking campaigns;
- ◆ Create opportunities for shared learning and evaluation;
  - ◆ Shared elements for data collection and outcomes measurement;
  - ◆ Joint collaboration with major researchers interested in evaluation;
  - ◆ Libraries of references and data on program efficacy that can be used for local grant applications;
  - ◆ Support of professional conferences designed to promote organizational growth and learning;
- ◆ Create efficient organizational vehicles for shared action;
  - ◆ Foster development of specific national collaborations and shared advocacy across the field;
  - ◆ Develop local and regional learning structures for organizations and communities interested in improving diversity;
  - ◆ Create links between programs across different phases of “The Bridge”;
- ◆ Effectively and efficiently mediate differences;
  - ◆ Create an organized and effective way to bring together organizations of different origin, location, target communities, funding sources, size, activities, into shared action;
- ◆ Create platform for engagement of differing kinds of constituent members;
  - ◆ Create 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



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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.

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### **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 pre-scribed by group process and not biased ahead of that process.<sup>1</sup>

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.

### **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:

- ◆ Bring about a future convening (physical, telephonic, or digital) of as many of the potential core members as possible;
  - ◆ Assure the convening is well-represented by diverse organizations;
  - ◆ Assure that the convening is openly advertised, transparent, and inclusive.

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<sup>1</sup> 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.



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- ◆ Develop for the convening a “Point of Departure” document, outlining:
  - ◆ The desires of the group to create a coalition,
  - ◆ The reasons for the development of the coalition,
  - ◆ A proposed process for moving beyond the convening to actually develop such a coalition;
  - ◆ 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.<sup>2</sup> 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 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.

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

## Next Steps

– prepared by Stanford Thompson

### Getting Started Developing a Formal Network

Networks (Associations) of this nature are typically developed in stages. Below is given a general outline of a pathway this collective could take, and the content developed within each stage.

#### Stage One – Development of Guiding Principles and Documents

In this stage, a small group of leaders with shared interest in founding the Network come together to draft a core set of guiding principles for the collective including:

**Definition of Core Membership** – What is the primary mission of the organizations represented by core members? What is their target population served? What are their shared fundamental elements of intervention/approach?

**Definitions of Auxiliary Membership** – Will there be additional allowed members beyond core membership? What will the categories of these additional members be?

**Mission of Association** – What is the primary purpose of the Network?

**Name** – What should the Network be called?

**General Governance** – What will be the voting rights of each category of Network membership? What will be the size and general composition of the governing board?

#### Stage Two – Vetting Draft Principles and Documents

In this stage, draft principles and documents are circulated to all potential members of the Network for comment and feedback. This may be done electronically, but is enhanced, where possible, by facilitated large-group discussion. There may be multiple iterations of revision between Stage One and Stage Two until it appears that the majority of potential members endorse the guiding principles and documents.

#### Stage Three – Development of By-laws

Using the above principles (and with ultimate assistance from an attorney) the leadership group will develop a draft set of by-laws for the Network. Such by-laws will codify the items outlined in Stage One and will also include (and not be limited to):

**Further Definition of Board Membership** – Board terms and qualifications.

**Nomination and Approval of Board Members** – Rules as to how the membership and/or board members bring forward, review, and install new board members.

**Board Officers** – Titles, responsibilities, and terms of board officers.

**Committees of the Board** – Composition and responsibilities of Standing Committees and rules for their appointment and operation. Rules for appointment and oversight of Ad Hoc Committees.



## Next Steps

**Dues** – Rules for levying and approving of membership dues.

**Budgetary Approval and Oversight** – Responsibilities of board and full membership for approval and oversight of budgets.

**Other Basic Requirements as Desired and Deemed Necessary** – This may include rights/responsibilities of members and/or board to hire the executive officer of the Network, additional guiding statements (e.g. vision and values statements), etc.

### **Stage Four – Vetting the Draft By-laws**

In keeping with the transparency deployed in Stage Two, draft by-laws will usually be circulated to all potential members for comment and feedback. This can again be done electronically and enhanced by group meeting. This process is done both to potentially improve the by-laws, but also to be sure that a perceived majority of potential members would be likely, when they came to a vote, to approve the by-laws.

### **Stage Five – Development of Initial Operating Plan**

Either after Stage Four, or if additional volunteer leaders are available, in parallel with Stage Three, a Network Implementation Plan is drafted including recommendations for:

**Location of Network Offices**

**Initial Staffing Plan and Budget**

Budget to include recommendations for initial funding strategy and dues

**Initial Workplan/Strategy** – Including short-term goals for Network ramp-up, operations, and member service.

### **Stage Six – Vetting of Draft Initial Operating Plan**

Again, either in conjunction with, or in succession to Stage Four, feedback from the potential full membership is sought for the draft operating plan. If it appears that there is majority agreement on the initial operating plan, the project is, when final rendition of by-laws is complete, moved to the next stage.

### **Stage Seven – Registration of Membership and Votes of Ratification**

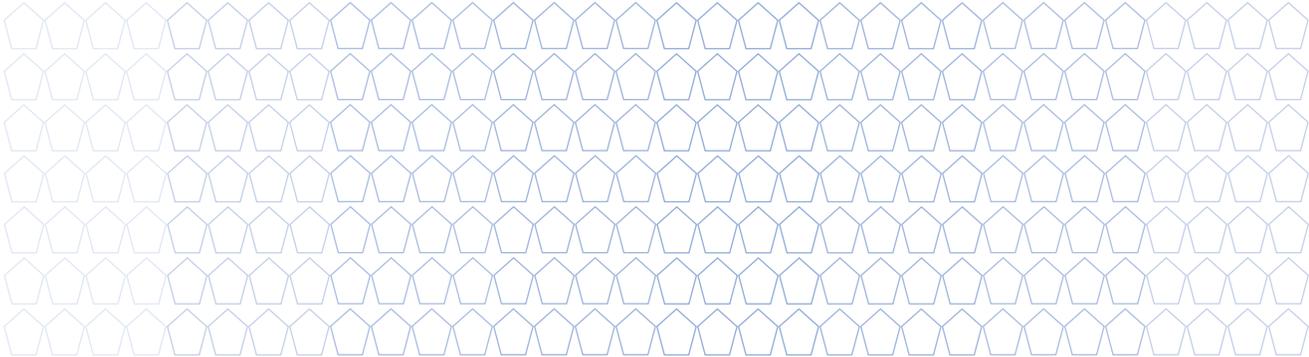
At this stage, all members who believe they meet the qualifications for membership specified in the by-laws, register themselves as qualified members. After the registration is complete, a vote is held to approve the by-laws. When the by-laws are approved, the membership then follows the procedures specified in the by-laws to nominate and approve the new board members and officers for the Network. When that is done, tax-exempt incorporation papers are filed (if the Network isn't incubated in an existing non-profit organization), the Network is registered with home offices in a given state but with a national charter, and the Network proceeds to open for business. After this, the Network moves on to implement the initial operating plan.



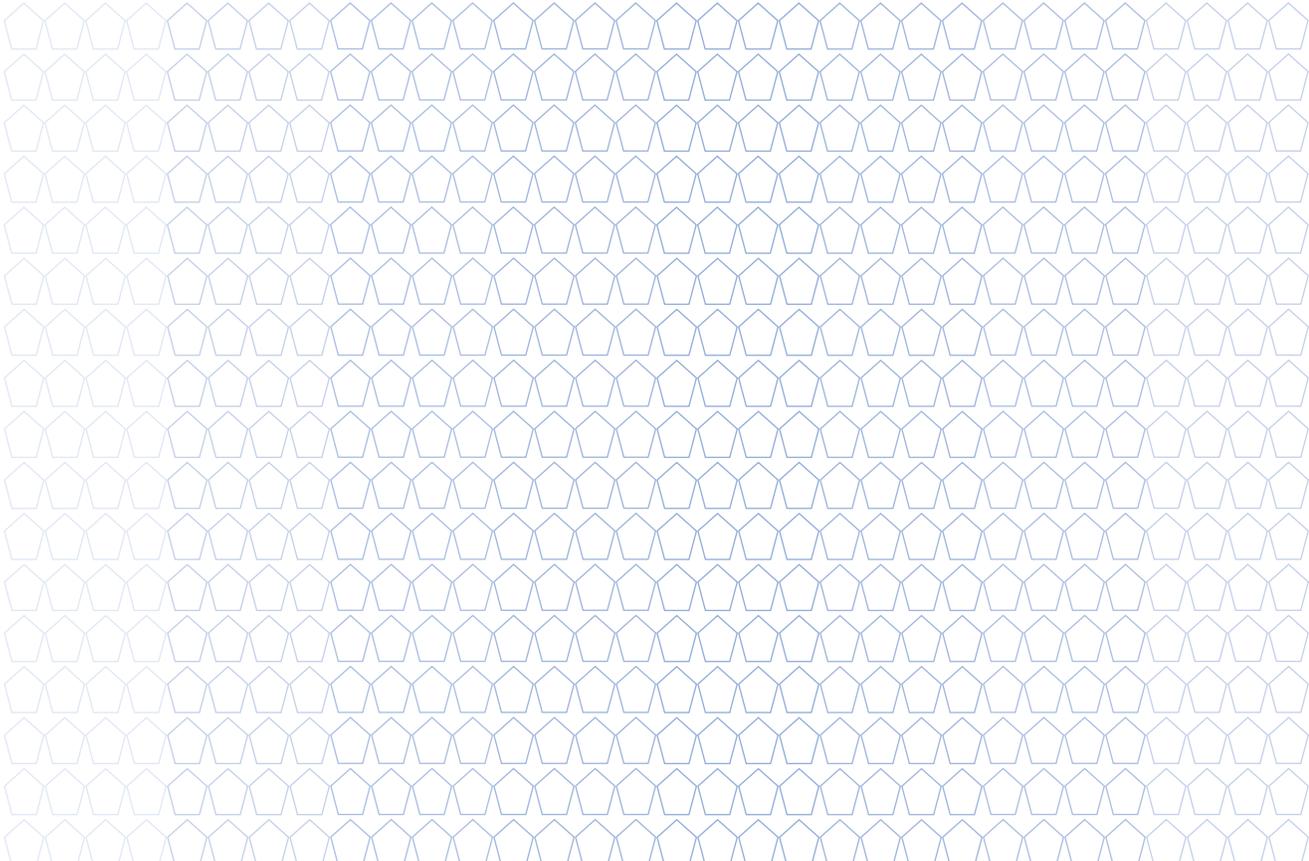
# Notes







**National Instrumentalist Mentoring  
and Advancement Network Convening**



**November 15 & 16, 2019**

**Cincinnati, OH**

