

# The Diversity Challenge: “Building the Plan”

January 26, 2017

Association of British Orchestras Conference  
Bournemouth, England

Jessica Schmidt  
*Orchestrate Inclusion*

# Introduction

- ◆ Session Focus:
  - ◆ Presentation of one D&I planning framework via the current story of the New Jersey Symphony Orchestra
  - ◆ Exploration of transferrable lessons learned

# Benefits of D&I Planning

- ◆ Builds internal “understanding, ownership, and engagement”
- ◆ Avoids “program only” D&I efforts
- ◆ Addresses the interconnected whole
- ◆ Creates a proactive and sustainable D&I culture
- ◆ Allows the organization to share unified plans, credibly and consistently

# Plan to Plan!

- ◆ Take a deliberate, intentional approach to D&I
- ◆ Process of aligning mission, values, and culture across the organization with D&I in mind
- ◆ D&I work cannot live in isolation!

# New Jersey Symphony Orchestra D&I Planning Process

# U.S. Orchestra Context

- ◆ Massive demographic changes
- ◆ Rise of D&I-related programs
- ◆ Increasing philanthropic focus on D&I
- ◆ Lack of strategic frameworks for this work

# NJSO Situational Analysis

- ◆ Unique traits of the NJSO:
  - ◆ 29 week orchestra
  - ◆ Players from across the region
  - ◆ State-wide representation

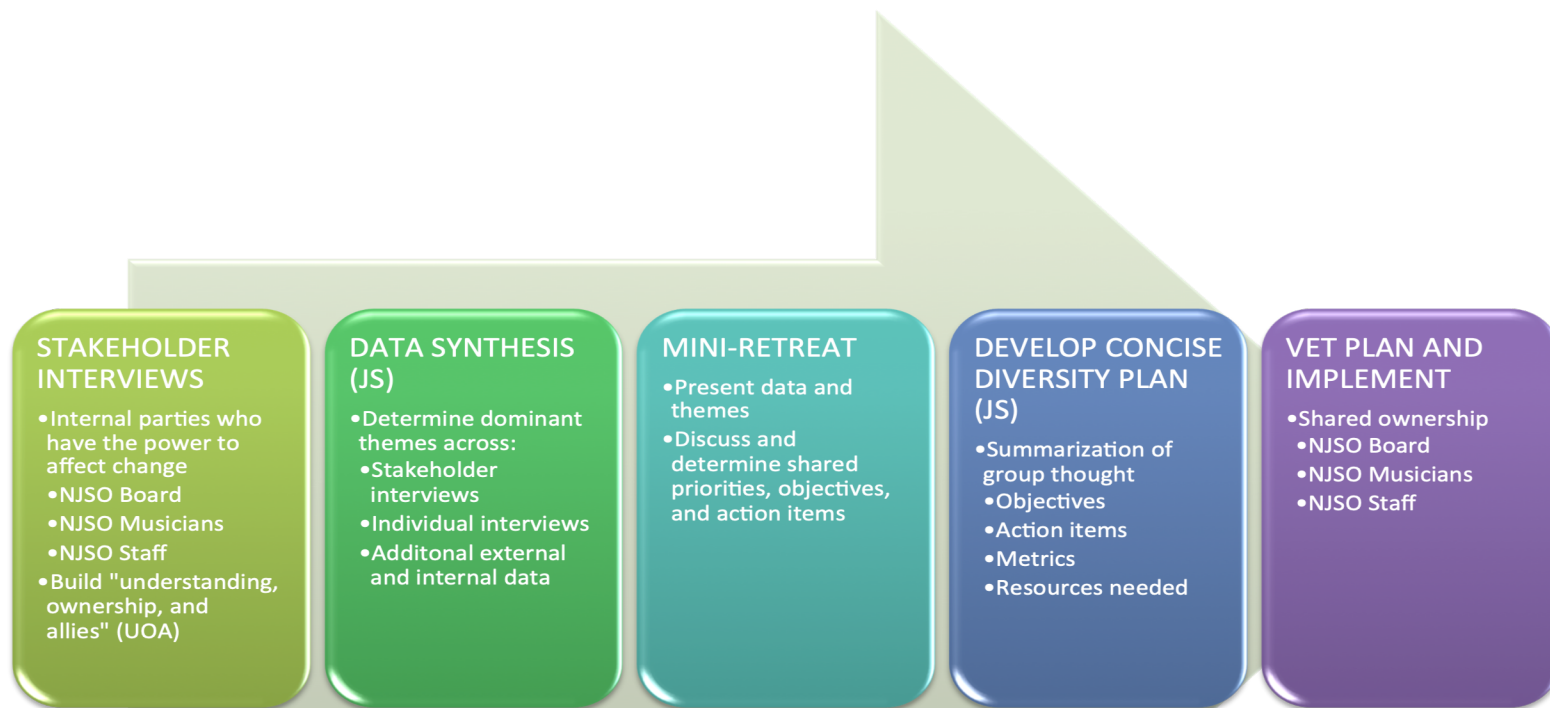
# NJSO: Years of Building D&I Momentum

- ◆ Musician participation in League's D&I Task Force
- ◆ Internal understanding of “why” around D&I
- ◆ Ally-building process



# NJSO D&I Task Force

- ◆ Formed in 2015
- ◆ Board, Staff and Musicians
- ◆ 2016- Task Force engages external advisor



Stakeholder  
Interviews

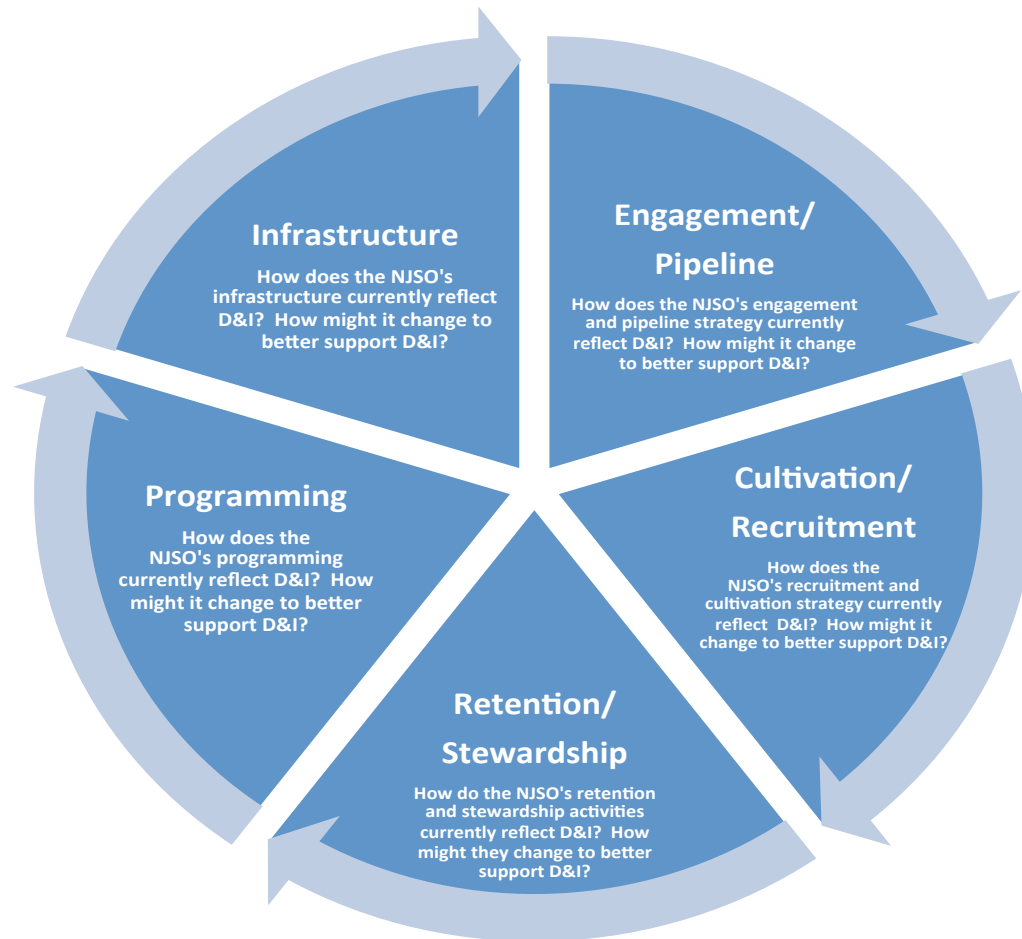
# Stakeholder Interviews

Participants included:

- ◆ 5 NJSO Board Members (4 of whom are members of the NJSO Executive Committee)
- ◆ 7 NJSO Musicians (including Orchestra Committee Chair)
- ◆ 19 NJSO Staff Members (including Interim President and CEO)
- ◆ 4 External Members of the Education Committee
- ◆ Incoming NJSO Music Director, Xian Zhang

*A total of 36 individuals were engaged via the internal stakeholder interview process*

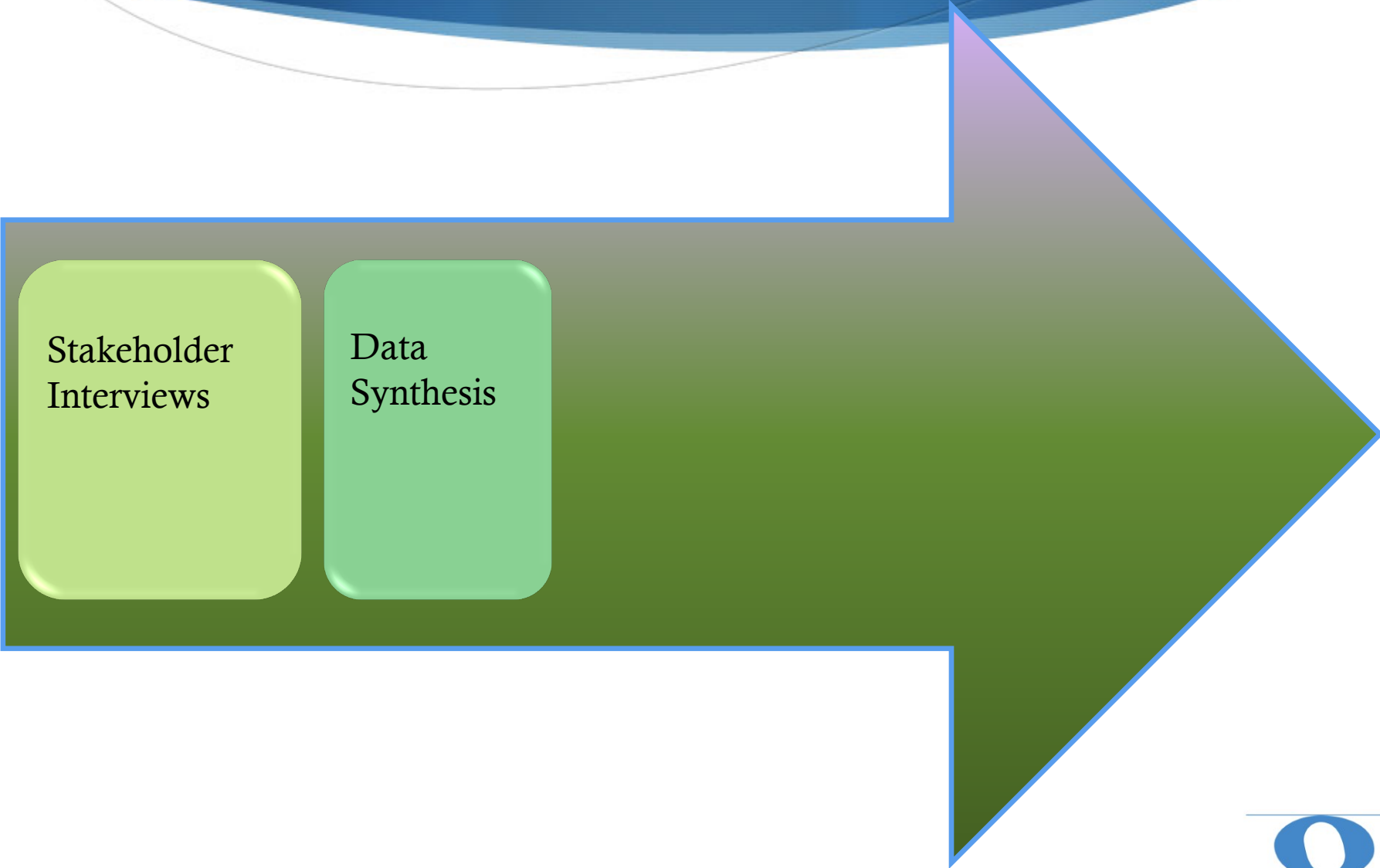
## NJSO D&I Stakeholder Conversations: Key Consideration Areas



Jessica Schmidt, 2016

“Diversity= The Mix Inclusion= Making the Mix Work”

NJSO Definition of Diversity Includes:  
race/ethnic background, age, gender, geography, socioeconomic status, physical and mental ability, sexual identification, family status, religion/faith



Stakeholder  
Interviews

Data  
Synthesis

# Result of Internal Stakeholder Interviews

- ◆ 13 Page Summary Report
- ◆ 8 Emerging Action Areas

## NJSO Diversity and Inclusion Planning

Emerging  
Action Areas-  
DRAFT

Propel D&I Momentum  
from Within the Board

Create Supportive Entry  
Pipelines- Onstage D&I

Position NJSO  
Education and  
Community  
Engagement as an  
Internal D&I Model

Capitalize on State  
Breadth and Newark  
Depth

Create Space and  
Resources for Staff R&D

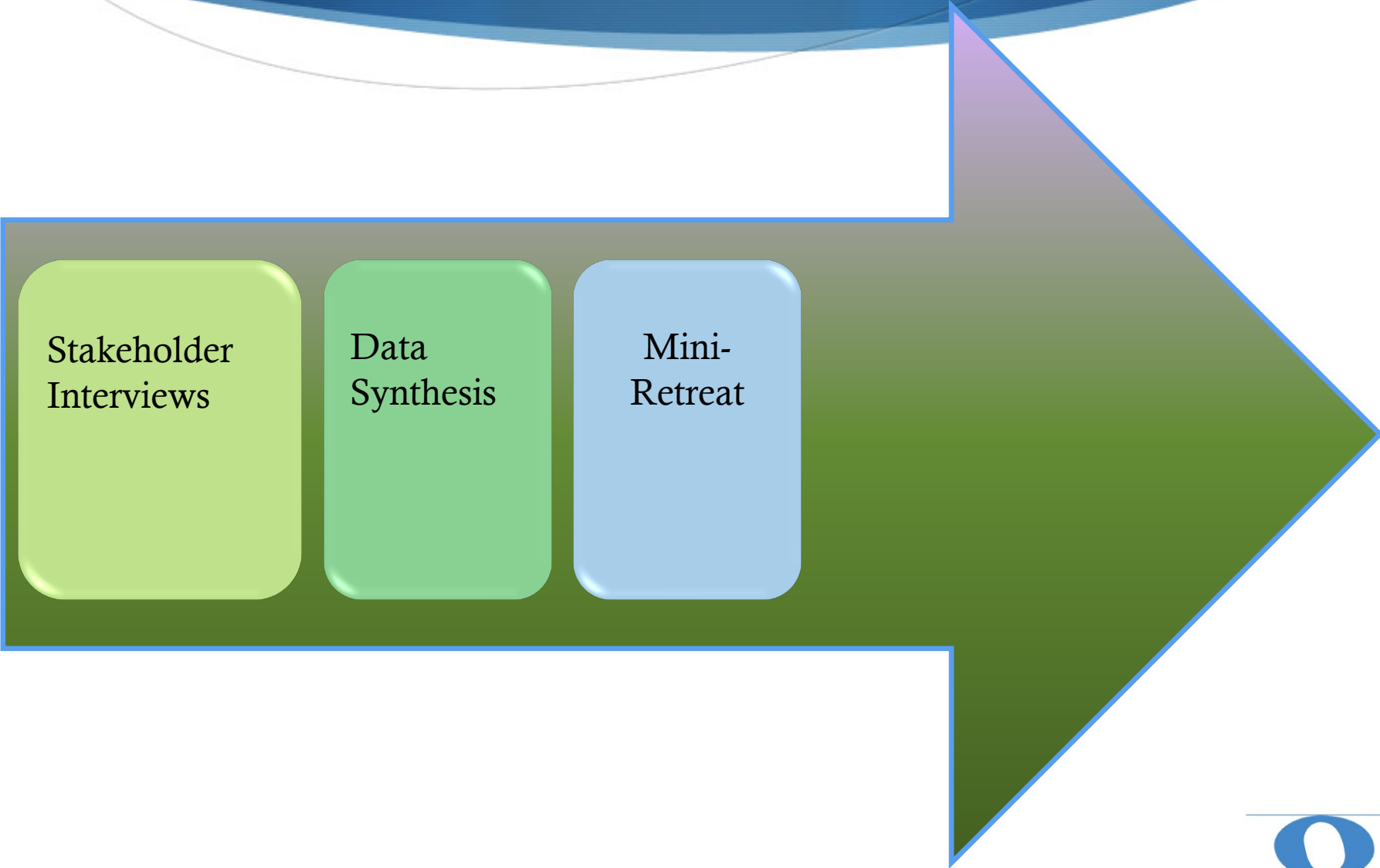
Build D&I-Focused  
Audience Development  
and Engagement  
Opportunities

Develop Internal D&I  
Learning Opportunities  
and Resources

Share the "Wins"/Align  
Internal Efforts

March, 2016  
Jessica Schmidt





Stakeholder  
Interviews

Data  
Synthesis

Mini-  
Retreat

# NJSO: Statement of Beliefs Creation

- ◆ D&I Task Force polled for input
- ◆ Written by a small group
- ◆ Discussed within the NJSO D&I Task Force
- ◆ Thesis for plan; constantly evolving

# NJSO D&I Statement of Beliefs (January, 2017)

## D&I Focus:

...explaining to an **external** audience why a commitment to D&I is important for the organization

## D&I Commitment:

...explaining to an **internal** audience why a commitment to D&I is important for the organization

## D&I Vision Statement:

...how would the **future** look if the NJSO succeeded in D&I efforts?

# NJSO D&I Statement of Beliefs (January, 2017)

## Diversity and Inclusion Definition:

*“For the New Jersey Symphony Orchestra, a commitment to diversity represents an intention to honor and actively seek the inclusion and involvement of the broadest possible representation of our community. This includes consideration of race, ethnicity and cultural background, gender, sexual orientation, age, socio-economic status, varying abilities, education, geography, family status, and religion.”*

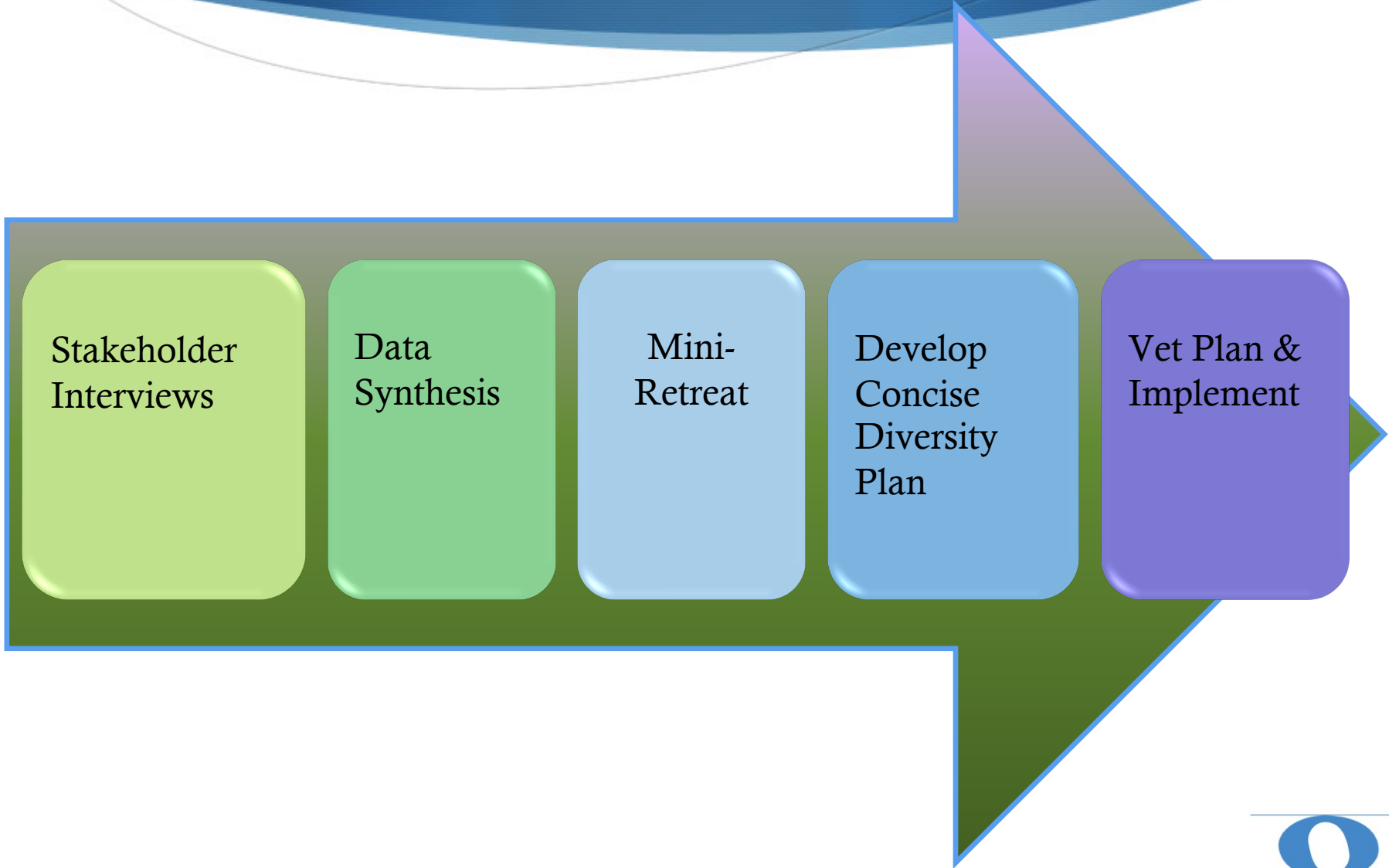
# NJSO: May 20 Retreat

- ◆ Primary Retreat Goals:
  - ◆ Identify and recommend priority action areas
  - ◆ Begin discussion of potential action items

# NJSO: May 20 Retreat

## Key Components

- ◆ Pre-retreat “homework”
- ◆ Small group breakouts
- ◆ Small group report-outs
- ◆ Facilitated full group discussion



Stakeholder  
Interviews

Data  
Synthesis

Mini-  
Retreat

Develop  
Concise  
Diversity  
Plan

Vet Plan &  
Implement

# Develop D&I Plan

- ◆ June, 2016
- ◆ Synthesized retreat data into a 20 page summary document



# Plan Structure

Four parts: “Why”, “Who”, “How”, and “What”

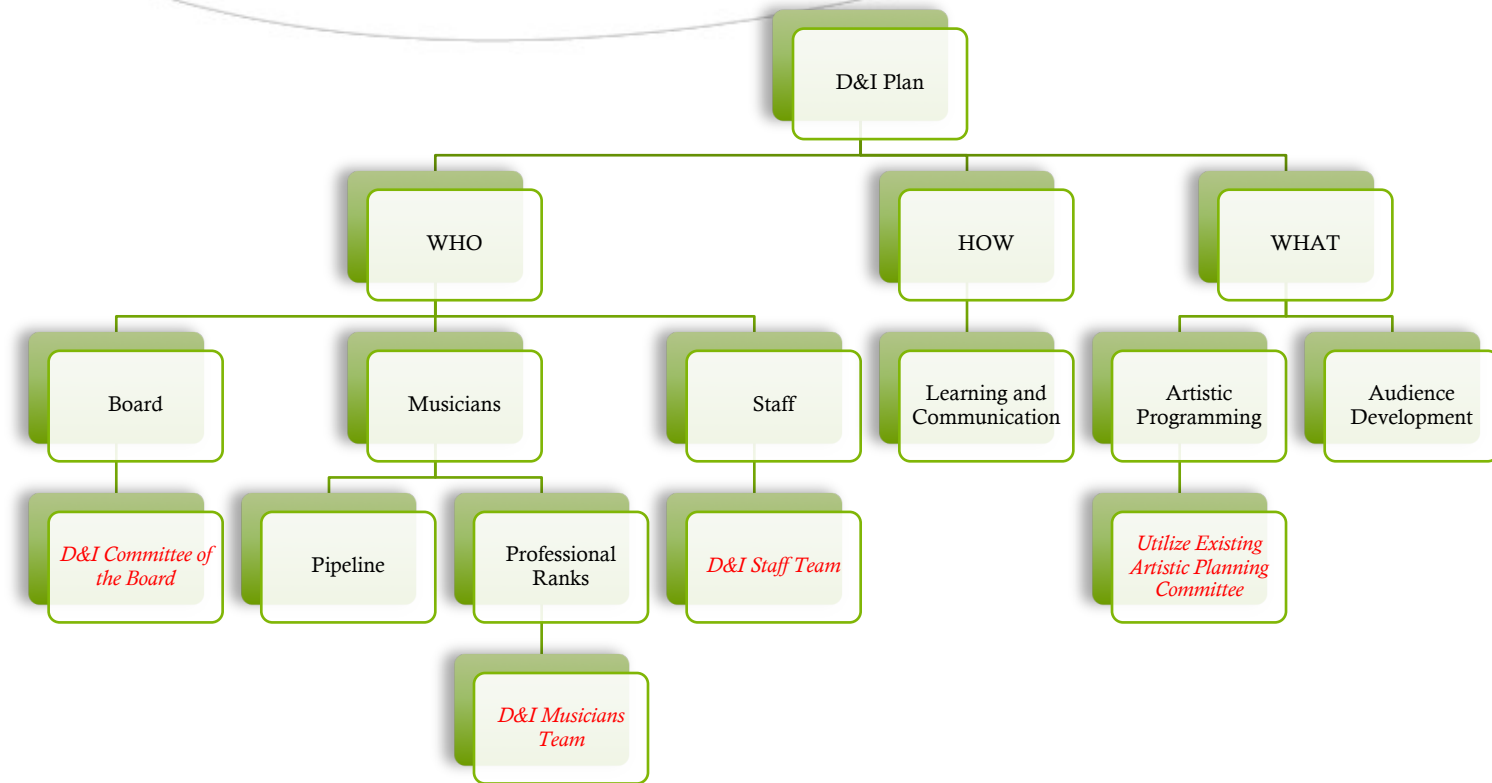
- ◆ “Why”: D&I Focus, Definition, Commitment, Vision Statement
- ◆ “Who”: Board, Musicians (2 parts), Staff
- ◆ “How”: Learning and Communication
- ◆ “What”: Artistic Programming, Audience Development

# Summary of Seven Goals

An overarching goal and several action items define each of the seven focus areas:

- ◆ Board
- ◆ Musicians (2 parts)
- ◆ Staff
- ◆ Learning and Communication
- ◆ Artistic Programming,
- ◆ Audience Development

# Functional Teams



# Implementation Status

- ◆ D&I Board Committee has been formed
- ◆ Board and Staff functional teams have been formed
- ◆ Musician communication continues to grow
- ◆ Demographic survey developed and administered to Staff  
(Musicians and Board to come)

# Next Steps in Implementation

- ◆ Metrics/timelines- set by functional teams
- ◆ Ultimate goal in the NJSO's D&I practice is culture change

# “Wins” via the NJSO D&I Planning Process

- ◆ Universal institutional interest
- ◆ Power of bringing board, musicians and staff together for conversation
- ◆ Recognition that D&I is part of the DNA of the organization

# Transferrable Learnings

# Transferrable Learnings: from Bob Wagner, NJSO Musician

- ◆ Communication is central to the process
- ◆ Leave space for dialogue
- ◆ Accept the long, slow process of building engagement



# Transferrable Learnings- from Susan Stucker, COO

- ◆ Create shared ownership- board, musicians, staff
- ◆ Financial support is necessary for this work to commence
- ◆ Look for existing allies within the organization
- ◆ Don't underestimate the time or resource commitment necessary to move this work forward
- ◆ Involve an external facilitator/consultant

# Transferrable Learnings- from Jessica Schmidt, consultant

- ◆ Define D&I broadly
- ◆ Build opportunities for meaningful participation
- ◆ Realize that every organization's D&I story will be different
- ◆ Set the long-term goal of culture change
- ◆ Look for internal wins and outstanding models already present within your orchestra

# Questions and Discussion

Jessica Schmidt:  
[jessicaschmidt43@gmail.com](mailto:jessicaschmidt43@gmail.com)

[orchestrateinclusion.com](http://orchestrateinclusion.com)