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## Collaboration and Transparency: The Oregon Symphony Music Director Search

A Roundtable

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# Collaboration and Transparency: The Oregon Symphony Music Director Search

**I**n the October 2000 issue of *Harmony*, readers were introduced to the successful organization development efforts the Oregon Symphony had undertaken.

During the course of that roundtable, participants discussed briefly the unusual process that was being used in the orchestra's search for a music director to succeed James DePreist, who had announced his decision not to renew his contract when it expired in 2005. DePreist (who is known in Oregon as "Jimmy") has led the Oregon Symphony for more than 20 years.

This past May, the symphony orchestra world learned that the search process had concluded two years earlier than planned, with the appointment of Carlos Kalmar as music director designate. Kalmar will assume the music director position in the 2003-2004 season. The Institute was curious as to how the search process had unfolded since our last conversation and invited members of the search committee to join us for a roundtable discussion. What follows is an edited transcript of that conversation.

**Institute:** We are delighted that you have agreed to share the details of the process the Oregon Symphony used to select a new music director. Let's begin by asking you to introduce yourselves and describe your involvement with the symphony.

**Niel DePonte:** I am the principal percussionist in the orchestra and have been here for 25 years. I was also chair of the orchestra committee, though not on the search committee, at the time James DePreist was selected in 1980, so this was my second music director search.

**Kathryn Gray:** I am a member of the violin section and have played in the orchestra for about 25 years. I served as a member of the search committee that recently selected Carlos Kalmar to be our next music director.

**Lynn Loacker:** I am past chairman of the board and have been on the board for 12 years. This was my first music director search.

**Mary Tooze:** I am currently serving on the foundation board and was a member of this music director search committee. I also served on the symphony board of

directors for seven years in the 1970s and was a member of the search committee that selected Jimmy DePreist.

**Tony Woodcock:** I'm president of the Oregon Symphony, and I've been here nearly four years.

**Institute:** Tony, give our readers a refresher about the formation of the music director search committee.

**Woodcock:** When I arrived at the Oregon Symphony, it was already known that Jimmy was in his last contract extension, which was due to expire in 2005. So, naturally, one of the first questions that I got from everyone was: what are you going to do about a music director search committee? I decided to tackle the question right away, and in December 1998, invited the entire orchestra to have lunch with me. The agenda for that meeting was much broader than just the music director search. As you will recall from our earlier conversation, the board was very interested in improving relations throughout the organization—musicians, board, staff, and foundation. And the music director search committee was certainly part of the conversation.

*“The musicians would be the majority shareholders, holding seven of the thirteen seats on the committee, and . . . the entire orchestra would vote to select its new music director and present that recommendation to the full board for approval.”*

The board agreed with my recommendations and authorized me to offer two things. The musicians would be the majority shareholders, holding seven of the thirteen seats on the committee, and, at the end of the process, the entire orchestra would vote to select its new music director and present that recommendation to the full board for approval.

**Loacker:** Among those who were on the board in 1998, only a few had been involved in the previous music director search. To help us decide where to begin, Tony, who had been through several music director searches before he came to Oregon, explained why musicians have a strong interest in determining who will be their artistic leader. His thoughts made sense to us, and the board agreed that musicians should constitute the majority of the search committee.

**Institute:** Kathryn or Niel, explain how the orchestra selected the seven search committee members.

**DePonte:** The orchestra committee that was in place at the time had very good representation from the various political positions within the orchestra. I would even describe it as an enlightened committee. They saw a need

for balance on the search committee of both the artistic interests of the various sections of the orchestra and the differing points of view that members hold about offstage matters. The orchestra committee put in place an election system that allowed us to accomplish both goals. The orchestra was divided into seven

groups representing a section or collection of sections, and each group elected one member of the search committee.

**Gray:** I would add that the orchestra committee also encouraged several members of the orchestra to nominate themselves. That was an important element in achieving the balances that were required for the process to succeed. I would agree with Niel's description of the orchestra committee as "enlightened." And as the process played out, it was probably fortuitous that our personnel manager, who is also a violinist in the orchestra, was elected to the search committee.

**Woodcock:** The choices for the six other members of the search committee were pretty obvious. Lynn Loacker was the current chair of the association board. Mary Tooze not only represented the leadership of the foundation, but brought long experience, including a previous music director search, and a wonderful knowledge of symphonic music. The marketing director, the general manager, the artistic administrator, and I represented the staff. Jean Vollum, a major supporter who endows the music director chair, served *ex officio*.

**Institute:** One of the first activities of the committee must have been the establishment of search criteria. Describe how the criteria were established, and how each constituency contributed.

**Woodcock:** The committee began its work by brainstorming. We literally wrote down everything we could think of that should be included in the criteria. We came up with a list that remained pretty consistent throughout the search process. We agreed that the new music director must:

- ◆ Inspire the orchestra, board, and staff.
- ◆ Be the orchestra's, therefore the search committee's, preference.
- ◆ Be an experienced music director.
- ◆ Have a depth of knowledge of classical period repertoire.
- ◆ Be a collaborator.
- ◆ Understand the American symphony system and the very strong need to connect with the audience.
- ◆ Be seen as a community leader.

**Gray:** We all recognized that this was an ambitious list. But throughout the process, I think we all understood the centrality of artistic musical excellence, of the inspiration we needed, and the desire to engage someone who would work to take the orchestra to a higher artistic level.

**DePonte:** There was also a mutual education process that took place. The musicians were quite clear about what they thought artistically. They had a good gut sense of what the orchestra needed to move forward artistically and technically. The board had a clear consensus about where the institution needed to go from a business model standpoint. The musicians on the search committee

came to learn, and to share with our colleagues in the full orchestra, that our responsibilities went beyond the characteristics that a music director might exhibit in a rehearsal or concert, and needed to include the overall vision of the institution for which we all work. Both the musicians on the search committee, and the orchestra as a whole, should be credited for making their decision based on a complete body of knowledge about what the institution needed at this time in a music director.

And I want to add one other thing. I don't think an orchestra organization can come to this type of music director search process unless it takes some of the steps we had taken earlier. Those steps had to do with developing trust. For us, the series of steps was quite direct: an inclusive strategic planning process; collective bargaining negotiations using Interest-Based Bargaining techniques; a music director search. But I do not think we could have done this search this way if we had not taken the other steps.

**Institute:** We have learned from some of the background materials that you provided that your initial list included 72 candidates for the music director's position. How was that list established?

**Woodcock:** Absolutely everyone contributed to the list. We threw the gates wide open and asked people to give us their ideas. Contributions came from every constituency. I put those names into three categories. The first I called "Dream On." It included people such as Claudio Abbado, and one or two music directors who have been dead for years! At the other extreme was "You've Got to Be Joking." And, of course, I won't name names there! But in the middle was a central core of terrific talent that we decided to take very seriously.

*"We sought musician-to-musician commentary about artistic areas, orchestra relationships, hiring-firing practices, and artistic growth patterns that each candidate had, or had not, been able to achieve during his or her tenure."*

**Institute:** So the initial list actually shortened itself. Tell us about the due diligence activities you undertook.

**DePonte:** The musicians on the search committee divided up the group of candidates and began calling their musician friends all over the world. We sought musician-to-musician commentary about artistic areas, orchestra relationships, hiring-firing practices, and artistic growth patterns that each candidate had, or had not, been able to achieve during his or her tenure. The phone bills were worthy of note.

**Gray:** The first wave of phone calls also involved many staff members. For example, our artistic administrator called many artists' agents to determine if the candidates were in our financial ballpark, and if they were interested in us. Everyone on the committee did due diligence. Once the list became smaller, we undertook more detailed due diligence. We contacted a variety of constituencies, always looking for a balance of opinions about each

candidate. We went back in time beyond candidates' current positions, in some cases 10 to 12 years, to try to get a complete picture.

**Woodcock:** Our due diligence became incredibly scientific. People devoted a huge amount of time to it. At one point, we realized Kathryn had become nearly a full-time due diligence officer. We used an approach through which everyone received the same questions, which allowed us to research everyone in exactly the same way. The reports that came back to the search committee were incredibly detailed. I should also add that several of us made trips to watch our candidates conduct.

**DePonte:** As the group of candidates became smaller and smaller, whenever we heard anything that was in the negative, we were extremely careful to research any bias that might exist for any reason. Knowing how difficult relations can be at times between musicians and conductors, we took a lot of comments with grains of salt. There is no question that this was a musician-driven process, and musicians' opinions were being filtered in from many, many sources.

When musicians hold the responsibility for an important process, they can be very fair-minded. When they hold the responsibility for artistic leadership, they take that role seriously and are not capricious with their judgments.

**Gray:** And I think it is important to add here that throughout this process, which involved musicians all over the world, there was a very high level of confidentiality. The information that came to us stayed with us. Mary Tooze was very instrumental in making sure we all understood that.

**DePonte:** None of the information that the search committee received went back to the full orchestra. Only when we were ready to present one candidate to the orchestra did we discuss our due diligence, and then in only very general terms.

**Tooze:** If I made one contribution to this process, having served on the previous search committee, it was to help everyone understand that every word that was said in a search committee meeting stayed in that room. There were several other music director searches under way at the same time, and they were being played out on the front pages of the local newspapers. Which I thought was dreadful. We decided we wanted no part of that. For two years, my role was to say to every committee member: say anything you want, but keep it in this room. There was an enormous amount of information—positive and negative—shared in our meetings. And I am very proud to say, not one word did leave the room.

**DePonte:** There is no question that the confidentiality requirement puts stress on the musician members of a search committee. We were often approached by

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members of the orchestra who wanted to know what was going on. You know, the water cooler conversation. We had to be really tough about not talking about any of this, which can create some interesting interactions. On the one hand, the musicians saw us as their representatives. On the other hand, they did not always understand the importance of extreme confidentiality. And our concern for confidentiality included not sharing information with the orchestra committee. The orchestra committee came to understand that they were out of the loop once they empowered a search committee. If any other orchestra wants to undertake a similar search, that's an important point to understand.

*“The orchestra committee came to understand that they were out of the loop once they empowered a search committee.”*

**Institute:** It is our understanding that the Oregon Symphony conducted a very public music director search and involved community members in the process. Tell us about those activities.

**Woodcock:** The involvement of the community was in our thinking right from the word go. To understand that, your readers need to understand our context, that Jimmy DePreist has been the Oregon Symphony's music director for more than 20 years. He is a wonderful local icon. He is synonymous with the orchestra. He has a huge, fantastic personality. We could say, intellectually, in our brochures and in our press releases, that change was

coming. But our big concern was that people would not understand emotionally what was coming. None of our 10 final candidates had previously conducted the orchestra.

We began our community involvement by very publicly declaring who our candidates were. They were listed as candidates in our season brochure. We told the media who they were. We told our colleagues in the industry who the candidates were. And we took a lot of criticism. To go public involved some interesting conversations with artists' managers.

We were quite straightforward from the beginning in working with the artists' managers. A couple of the managers actually came to visit us to learn firsthand what we were doing. And after we sat down together, their response was: yes, this is right for Oregon. The fact that we had 10 candidates says that an orchestra can, indeed, conduct a search in this way. Two other candidates chose not to continue the process because of its public nature, which was fine with us.

We also made it very clear that a candidate's visit was not just a podium stop. It was an interview process. Candidates could expect to be interviewed by the media, be introduced to members of the board, have lunch with both board members and the search committee, and attend postconcert receptions to meet major donors. Our candidates did not have a single spare moment when they reached town. Our assessment was intense both on and off the podium.

**DePonte:** Contemporary music directors need to act in flexible ways to meet the needs of many stakeholders within the orchestra institution. We expect artistic

vision and technical ability, of course. But the new breed of music directors will take advantage of the creative potential of all members of the orchestra institution and find ways for those members to express their creativity in service of both the artistic and strategic goals of the organization.

**Tooze:** Comparing the last search committee on which I served with this one, I have had the opportunity to witness and participate in growth in music democracy. I am not a young woman, and I want to say this is good growth. Perhaps some of the best growth in this country.

**Woodcock:** In terms of involving our community, we went even further. At every single concert that was conducted by one of our music director candidates, over two seasons, we put out an audience survey. We also put the survey on our website. When we began, we had no idea what was going to happen. In fact, the surveys were snapped up like hotcakes. With each conductor's visit, we were getting up to 700 surveys back. Our audience members were taking this seriously. They not only checked off the boxes as we asked, they wrote to us as well. We asked for their opinions, and we received essays and drawings. We had a lot of information.

*"We got comments about everything from baton technique to the styling of the candidate's hair!"*

**Loacker:** We got comments about everything from baton technique to the styling of the candidate's hair!

**Woodcock:** We surveyed the orchestra after every candidate's visit, which provided central information to the search committee. When we compared the orchestra's response to a candidate with the audience's response to the same candidate, we learned that when a conductor excited the orchestra musically, it showed in the audience survey.

**Gray:** That was a wonderful affirmation that we were on the right track. The congruence of the opinions of the orchestra, the audience, the staff, and the search committee gave us a great deal of confidence about what we were doing. There had not been a music director search for a very long time. This process of player involvement was unfamiliar to the orchestra. Tony provided a great deal of leadership. He brought the board along; he set this process in place for every constituency.

**DePonte:** Let's don't shortchange the importance of surveying the orchestra after each candidate's visit. The surveys were quite detailed. They asked all the standard technical questions, but they also invited the orchestra members to give us their comments. Throughout the process, we tabulated the surveys, including pages and pages of comments. It was very important when we came to make a final recommendation that we had both numerical and descriptive data that had been collected immediately after performances.

**Institute:** Were there points along the way when you questioned what you were doing?

**Woodcock:** Absolutely. We knew we were blazing a trail, and we knew there would be risks associated with that.

**Loacker:** From the beginning, we were criticized for undertaking a five-year search process. We were constantly questioned by our colleagues about what we were doing. And yet, we know that in many American orchestras, concerts are being planned, and conductors are being engaged, three years ahead of time. We watched other orchestras announce the appointment of new music directors who would not begin their tenures for three years. So we were able to say that what we were doing wasn't so crazy.

*“Not one of our candidates had conducted here before, and we had no prior relationships built.”*

**Gray:** Because it had been so long since this orchestra had undertaken a music director search, every group involved had a great deal of learning to do. Not one of our candidates had conducted here before, and we had no prior relationships built. The orchestra had not played for such a regular procession of guest conductors.

**DePonte:** There are many orchestras in this country that would contend that having the board lead a music director search is a more efficient process than the one we used. But being more efficient is not necessarily being more effective. Even with the risks that we knew were attached, an open, inclusive process was right for this orchestra.

**Institute:** So you spent two seasons getting to know your candidates. Then, in May 2002, the pace of the process changed. Explain to our readers what transpired.

**Woodcock:** Jimmy DePreist asked to have lunch with our board chair, Jack Wilborn, and me. He offered to consider changing his role with the orchestra if it would be helpful to the search process. He put forward the idea of assuming a new title of music director laureate which would allow us to accelerate the process of finding his successor. Jack and I took his offer to the board and to the search committee, and recommended that each group consider it seriously.

Our search was actually coming along very well. We were at the point of homing in on three final candidates, each of whom, as we knew, was also a candidate elsewhere. We needed to consider whether we could afford the luxury of taking another two years to make up our minds when other orchestras might be better positioned to make a selection. We concluded that Jimmy had provided us with a wonderful opportunity, and that we should take that opportunity and run with it.

**Institute:** We know that in a matter of weeks after you received Jimmy's offer, Carlos Kalmar was named music director designate. That seems amazingly quick work for a symphony orchestra! Again, describe the processes that were used to bring the search to its conclusion.

**Woodcock:** Because we had been so intent on maintaining confidentiality during our search process, we were ironically in the position to be accused of not having communicated. We were suddenly faced with the reality that we needed to speed up communication as if there were no tomorrow.

*“But the most convincing part of that meeting was when the musicians spoke to the board. They spoke with passion. They spoke with commitment. And they spoke with a tremendous sense of responsibility....”*

The first thing that we did was to put the search committee in the same room with the full board. We asked David Hyslop, the president of the Minnesota Orchestra, to join us to facilitate the discussion. David has been through several music director searches, and he did a magnificent job of taking us through the whole process and answering questions. But the most convincing part of that meeting was when the musicians spoke to the board. They spoke with passion. They spoke with commitment. And they spoke with a tremendous sense of responsibility as to what they had been doing and what they were looking for.

**Locker:** Up until that point, the board had been given general progress reports about the process. The joint meeting with the search committee was an opportunity to clarify what had been going on, to give board members the background they needed to feel comfortable and confident that the process had been conducted in a professional manner. Board members asked many questions to satisfy themselves that adequate due diligence had been done. They wanted to determine if those of us on the search committee had learned enough about our candidates, not only on the podium, but as representatives of the orchestra in the community.

I would add that David Hyslop’s participation was most helpful. It was wonderful to have affirmation about our process from an outside source. Not that we don’t trust Tony, but to hear someone who had not been involved in the process tell us that we had done it right was very reassuring.

**DePonte:** It felt very good to be able to engender trust from the board members who had not been part of the search process by letting them ask their questions. Interestingly, we did not talk about individuals in that meeting. We talked only about process. We talked about how the criteria we had established early on played a central role in what we had done. By the end of the meeting, everyone was on board in agreeing that the search committee was on the right path.

**Tooze:** By the end of that meeting, thanks to the very professional presentations that Tony, the musicians, and David Hyslop made, the entire board was comfortable. They felt that they were in the loop enough to be comfortable, and they wanted to be part of bringing the search to a conclusion.

**Woodcock:** Following the search committee’s meeting with the board, we held several major meetings with the orchestra. The first was a press conference on

the stage for Jimmy's announcement of his changing role. Many members of the orchestra were shocked. They had no idea what was coming.

The same day as the press conference, I invited the entire orchestra to have lunch with me. I gave a presentation as to where we were with the search process, and the fact that we were down to three candidates. After nearly one and one-half hours of discussion, the musicians requested another meeting in order to hear more from the search committee members. I agreed to that.

The meeting with the search committee was absolutely seminal. Several of the musicians on the search committee spoke about the process and about what they had spent the past three and one-half years doing. The questions were very direct, and they were answered very honestly. After the meeting, many of the musicians said they now understood what we had been doing. They were relieved and reassured.

At the final meeting, which was to present the search committee's recommendation, we again asked the musicians on the search committee to talk, in a general way, about due diligence, to present a very clear, detailed picture that would then allow the orchestra members to vote. Which they did, affirming the search committee's recommendation.

**Institute:** Kathryn and Niel, describe these meetings from the perspective of musicians who served on the search committee.

*“ In the final analysis, we were fortunate that there was congruence among the recommendation of the search committee, the judgments expressed by orchestra members through the surveys, and the opinions of our audience members. ”*

**Gray:** I would describe both the board meeting and the final meeting with the orchestra as tense and challenging for the committee. Though both groups had information, they were looking for a more personal communication. They needed to hear committee members describe their criteria, their efforts, and show that the process was thorough and exhaustive. They needed to hear that we were passionate about our recommendation. I felt a tremendous responsibility to be convincing in my remarks.

**DePonte:** I would agree with Kathryn that the meetings were tense. That's to be expected when critical decisions are being made that affect large numbers of people. In the final analysis, we were fortunate that there was congruence among the recommendation of the search committee, the judgments expressed by orchestra members through the surveys, and the opinions of our audience members.

**Woodcock:** And, of course, following those meetings, and after the orchestra had taken its vote, as we had planned from the beginning of the process, their recommendation was presented to the full board for approval.

**Institute:** Although, as we have this conversation, it has only been three months since Carlos Kalmar's appointment was announced, what are your assessments of the process as it played out?

**DePonte:** I think we have thoroughly debunked the myth that this kind of process is too cumbersome and won't get the job done. The agility that this organization demonstrated—across every constituency and involving large numbers of people—to bring the process to a conclusion following Jimmy's announcement says loud and clear that an orchestra organization can be simultaneously thorough and quick.

As the process we were using became known in the orchestra industry, we were all told that our transparency would discourage the best conductors from considering the Oregon Symphony. I think we have debunked that myth, too. Truth be told, there are many wonderful, talented conductors out there. We think of our organization as a learning organization, a collaborative organization, and we were not particularly concerned about "losing" someone who did not agree with our modus operandi.

**Woodcock:** There is yet another myth to debunk. We hear too often in this industry that you cannot trust musicians to make the right decision. That if you put musicians in the position we put those on the search committee, they will select the least challenging candidate. Our search committee, in fact, recommended a very challenging candidate. And our orchestra members agreed. I would argue that if you say to the most artistically knowledgeable people in the organization—the musicians—we trust you, it actually makes the chief executive's job much easier. Our musicians delivered! And they delivered at the highest possible level.

*"It was very clear to me, as the board chair when we began this process, that the musicians needed to lead. They needed to be the majority shareholders of the process."*

**DePonte:** The process also affirmed that this is a very confident organization. Management, the board, the foundation, and the musicians share great trust. The "fear factor" is nonexistent here. And it is for those reasons that we could undertake and complete the search in the way we did. That doesn't mean that staff and musicians agree on all matters, but we believe we have a collaborative framework in place for problem solving.

**Tooze:** Having now been involved in two search processes, I must tell you that they were as different as night and day. Though we had a wonderful outcome in the search that resulted in Jimmy's being named music director, in this search, the artistic agenda, not the political agenda, came to the fore. Our musicians put in enormous amounts of time and did so willingly.

**Loacker:** It was very clear to me, as the board chair when we began this process, that the musicians needed to lead. They needed to be the majority shareholders of the process. We nonmusicians on the committee

certainly had roles to play in assessing our candidates against our audience and community criteria, and we did.

**Gray:** In my mind, though the musicians held the majority of the seats on the committee, we did not think of ourselves as having an advantage. To do the job well, we needed the input from each faction. As our search progressed, our understanding and grasp of the issues grew. We all agreed that the search process served us well. We all understand that when we have an excellent musical product, it makes it easier for the board to raise funds, easier for Tony to lead, easier for the marketing and public relations people to sell. An excellent musical product brings people to the concerts and makes the orchestra happy to make great music.

**Woodcock:** Kathryn, while I love what you just said, I think it is important to note that we are not presenting our process as a model for the industry. We are presenting it as a series of experiences. I would hope that other orchestras would cherry-pick our ideas and make them work in their own environments.

**Institute:** Tony, we agree that one needs to understand one's environment in order to design processes that will serve the organization well. Our congratulations to all of you for understanding and acting on that notion. We thank you for sharing your process and experience in great detail. We will continue to follow the Oregon Symphony's progress and wish you well.