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Building an Institution: The New Jersey Symphony Orchestra



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Building an Institution: The New Jersey Symphony Orchestra

Four and one-half years ago, in *Harmony* #4 (April 1997), we featured a roundtable discussion with members of the New Jersey Symphony Orchestra (NJSO). In a preamble to the discussion, we presented a brief history of the orchestra, including some of the trials the organization had endured, and outlined the elements that contributed to the NJSO's 1991 "turning point." Readers who would like to refresh their memories of that discussion are invited to visit the Symphony Orchestra Institute's Web site at <www.soi.org> and follow the *Harmony* link.

In a brief coda to the 1997 roundtable, the Institute offered the following thought:

It is generally agreed that the NJSO would not exist today without the new levels of communication, involvement, participation, trust, and leadership initiated five years ago. Long-standing and high orchestral artistry continues to be a primary asset. As a total organization, the NJSO appears ready for its large external challenges. It is a reasonable bet that this organization will be successful.

Was it a reasonable bet? The Institute recently held an update roundtable discussion with NJSO musicians, staff, and board members, several of whom had participated in the original conversation. An edited transcript of the roundtable follows.

Institute: Please introduce yourselves and describe your roles with the New Jersey Symphony Orchestra.

Victor Bauer: I am a trustee of the orchestra and vice chairman for finance. I have been a trustee for about nine years.

Karl Herman: I am principal clarinet and have been a member of the orchestra since 1979.

Victor Parsonnet: I have been chairman of the board for 10 years and have served a total of 15 years on the board.

Jonathan Spitz: I am principal cello and have been a member of the orchestra since 1984.

Susan Stucker: I joined the orchestra in 1989 in operations and am now general manager.

Karen Swanson: I joined the orchestra right out of school in 1986 in operations. I have served in a number of positions, including general manager, and am currently director of development and external affairs.

Lawrence Tamburri: I have been the executive director of the NJSO since 1992.

Christine Terhune: I am a violist in the orchestra and am completing my 25th year.

Bob Wagner: I am principal bassoon and chairman of the orchestra committee. I joined the orchestra in 1979.

Institute: So let's just jump right in. What do you consider to be the most important things that have happened since you last shared your thoughts?

Parsonnet: The most important thing that has happened was the opening of the New Jersey Performing Arts Center. The opportunity for the orchestra to perform in a marvelous hall has created enthusiasm at all levels. The move changed the perception of the NJSO in the community, the size of our audiences, the number of our subscribers, and the quality of the orchestra.

Institute: In our 1997 roundtable, you were all anticipating the move, but you expressed some anxiety about what would actually happen.

Parsonnet: One of the anxieties was whether the audience would show up. And the audience has shown up big time. In the first three years, three million people have come into the city for various concerts and events at the Performing Arts Center. The city of Newark is exploding around the center. There are new restaurants. A park is being built along the river. There is so much happening and it all relates to the opening of the building.

Institute: From an organizational point of view, have things been equally positive since our last conversation?

Tamburri: Organizationally, two important things have transpired. Right before the opening of the hall, we settled on a new three-year players' agreement and last year we settled on another three-year contract, which would be interesting to talk about. The NJSO is also one of the original seven orchestras selected to receive important funding from the Mellon Foundation's Orchestra Forum program, and that grant and the work the orchestras are doing has accelerated the levels of cooperation within the organization.

Wagner: Interestingly, the *Harmony* roundtable itself has had an effect on our organization. Other orchestras learned a lot about what we had been through, what we were facing at the time, and how we had resolved things to that point. Ironically, I was chair of the orchestra committee when we last talked and I am again. Many of my fellow orchestra committee chairs around the country have been in touch with me to talk about what we do in the NJSO. That helps me keep things in perspective as we try to take our organization to new levels.

Institute: Larry, you mentioned that you have completed two three-year musicians' contracts since we last talked. Let's explore those processes.

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Tamburri: The year the hall opened was going to be the first year of a new agreement with the orchestra. Traditionally, that would have given the musicians excellent leverage by waiting until the very last moment to begin serious negotiations. But that's not what happened. The musicians actually came to us early on and wanted to negotiate because there were so many other things we wanted to accomplish in moving to the new hall. We had very good discussions during the negotiations and were able to announce at our last subscription concert in May 1997—three months before the contract was up at the end of August—that we had reached a three-year agreement.

The process worked well and actually set the stage for our more recent negotiations which occurred 18 months ago.

Wagner: Larry, I think it is important to give *Harmony* readers the background for our negotiations. There is no question that our conversations were stimulated by the fact that four of us—two staff members and two musicians—had just attended an American Symphony Orchestra League Leadership Academy at Lake Arrowhead, California. We had a positive experience in which we forged substantial bonds. Then we literally came off the mountain and went right to the negotiating room. All four of us had experienced something that we needed to share with our colleagues during the negotiating process.

Institute: Explain to us who was in the room and how you proceeded.

Wagner: There were seven members of the union committee plus the president of our union local. Larry, Karen (Swanson), and Susan (Stucker) were there from the staff, and Victor (Bauer) was there from the board. Victor had been part of the negotiations three years earlier and we found it valuable to have him there because we were actually talking with the board more directly. And Victor also always keeps us on process and on task.

There were no lawyers in the room, a decision to which we all agreed before the process began. There was also no table in the room. We found that we would rather sit in a circle without a table because we could share things more openly, not feeling that we constantly needed to make sure that an opinion expressed was from either the staff or the musician side of a table. We started our discussions by focusing on the major issues our organization was facing.

Bauer: It really was a rather unique process. I have been involved in all kinds of negotiations in corporate life, and this one was different in that, from the start, it was very collegial. We had several sessions in which we talked about the

general, overall future of our orchestra, what our problems are, and what we wanted to accomplish. At the same time, small groups—usually one staff member and one musician—were asked to address specific items, write some language, and be prepared to present the ideas later to the larger group.

On virtually the last day, when we really got down to talking numbers, we were all of the same mind on the nuts and bolts of the finances of the contract, and it did not take long.

Tamburri: We had a signed agreement in December 1999, eight months before the current agreement expired.

Terhune: I want to underscore the importance of having been part of such a successful experience. Having been here 25 years, I've seen the dark side of what life in an organization can be like. We need to help others understand the importance of learning to bring conversations down to a more human level and really work on that level. While not everybody is on board yet, the fact that we have started to work in this way and shown it to be successful is important. It is something viable and we can take it further into the organization.

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Wagner: There is one final thought that I would like to add. Our union local president attended every session with us. After six sessions in which we had discussed issues, but negotiated nothing, he took me aside to express his disappointment with the way things were going. He thought we were probably wasting our time and wouldn't get far. After we came up with a package, presented it to the players, and it was ratified, he apologized for his skepticism. He said he had really been enlightened on a way of negotiating.

Institute: Christine, you have touched on something that we should explore a bit further. All of you in the room have become quite close through your participation in a process. But let's take a look at the challenges of getting this philosophy to ripple out further in all of the constituencies of the organization.

Parsonnet: That is an interesting direction to explore. We had our annual board retreat last night, and that very subject came up during the course of the evening. The 25 board members who were at the meeting are completely sympathetic and understand our culture. But we have 45 board members, and not all of them even begin to understand what we are trying to do. Broader communication is a problem, and I'm sure the same problem exists in the orchestra, on staff, and in the volunteer organization.

Spitz: From the orchestra's perspective, I think many of the musicians do buy into seeing the big picture and the way we work with the staff and the board. But there is a vocal set of our musicians who are really resistant to working in a

collegial way. Historically, part of our culture is a sense that we will only get the most for ourselves financially by taking a more traditional, adversarial approach in negotiations. This does create a divide, and I think it is our biggest obstacle to moving ahead.

Herman: Jonathan, I don't believe the group of 20 or so people you are talking about confine their negative view of a new way of working to just the orchestra. I believe that they probably exhibit this kind of perception and behavior in every aspect of their lives, not just with the orchestra.

At the retreat last night, one of the things I mentioned was the ability of the players to address new concepts and new ways of working, to adapt to new situations in the organization. To my way of seeing it, the sections of the orchestra that have a higher turnover of personnel—whether these players are fresh out of school or have years of experience—seem to have the greatest collegiality. They also demonstrate the best ability to address changes, new concepts, and new ways of working together. Where there has been little personnel change is where I find the greatest resistance. That's just my observation after 20 years.

Wagner: To graphically illustrate what Karl just said, he and I joined the orchestra in the same week. When we came to work here, we didn't actually come to work because we were on strike. That was our first experience in the New Jersey Symphony Orchestra—being on strike. We were taught that the culture here was “we hate the manager, we hate the conductor, we hate the staff, and we're on strike.” Those things made perfect sense to us in our first professional experience.

Now as new members come into the orchestra, the orchestra committee sits down and explains some of our history, the evolution of relationships, and the new ways we are trying to look at things. The point is not to forget about the past, but to understand the evolutionary track we have followed, and that we are in a different place now. Our feedback from the musicians with whom we have taken time to share both history and forward outlook has been very positive.

Parsonnet: What I would like to see happen is for every individual in this organization to stop and think about what it feels like to be in the other person's shoes. I always have the feeling that there are some musicians who have never stopped to think about what it feels like to be a trustee and to hold certain responsibilities. Similarly, I think many board members have not stopped to think what it feels like to be a musician who has to worry about making a few dollars and keeping a roof over his or her head. If we could get everyone to think this way, things would be smoother, and I truly believe we can do it.

Tamburri: In terms of staff, we do have orientation, and certainly the senior staff is involved in this entire process. Generally, the tenure of the staff is less than that of either the musicians or the board, and in certain positions, employees may have no background in music or nonprofit organizations. So it is a constant issue to bring them into our culture.

And I would like *Harmony* readers to understand a few other things that are important about our culture. We are in a competitive marketplace, the most competitive in the United States. The quality and level of playing among our musicians is extremely high. That is one characteristic of our orchestra. Another is that we play subscription concerts in seven locations. The travel can be tedious. The acoustics in each hall are different, so our musicians must be able to adjust. The concept of flexibility runs deep within our culture. People don't stay long if they are not flexible. The concept of flexibility has a great deal to do with what is happening in our organization and the way it works.

Institute: We've talked a good bit about where the NJSO is and how it got here. Let's turn our thoughts toward the future. What's currently on the organization's plate?

Bauer: We have an interesting opportunity because our music director is in his final contract with us. This gives us the chance to consider how we should arrange governance and artistic leadership for the future. Members of the orchestra, staff, and trustees are meeting individually and together to toss around some new and fresh ideas as to how we might be structured. There are no decisions yet and probably not even a consensus on direction. But it is certainly an opportunity to look at things that range from remaining in a traditional structure to having quite different possibilities for the future. But the process itself is one of the things that helps us with the idea of communicating a culture and values throughout the organization.

Swanson: Although we may not know where this is going to come out or have a strong consensus around any one particular structure, I do think there is strong consensus around developing opportunities to increase musician empowerment and ownership of the orchestra. We have worked hard to develop collaborative, flexible relationships.

Terhune: Picking up on what you just said, Karen, the musicians are in the throes of trying to figure out what exactly it means to be members of an organization, as well as being members of the orchestra. As musicians, we have been used to showing up, playing the concert, and that's it. But it's more than just showing up and playing, and I think people are beginning to see that the boundaries of our particular jobs, as they are described in our contracts, need to be blurred in order to have growth. People are beginning to learn exactly what it means to keep an organization viable and to grow, develop, and change the organization.

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Spitz: The other side of what Christine just said is still the question of how we are going to bring in and include the players who are really mistrustful of change, mistrustful of collaboration. There are artistic ramifications in that. If we are even going to consider a structure that includes some musician self-management, we have a ways to go to make it really work.

Tamburri: For the last year, somewhat initiated by being in the Orchestra Forum, we have been involved in the process of looking at our core values, revisiting our mission, looking at our vision, and creating BHAGs—Big, Hairy, Audacious Goals. Several people have mentioned the board retreat we had last night and I think we should discuss that a bit. Our board retreat has traditionally included members of the orchestra, members of the staff, and members of the board together. We broke into five cross-constituency groups to look at potential BHAGs, and last night each group made a presentation about what directions the BHAGs might take us and what the next steps might be.

Bauer: Just as an example, one of the BHAGs we discussed last night states: “To be perceived as the leading orchestra in the industry in the empowerment of and collaboration with its musicians.” But the one that struck me most, because it was one of the most highly rated among the musicians, which I did not expect, is the BHAG that states: “To have every musician recognize and accept responsibility for the artistic integrity of the orchestra.” That, I think, is encouraging. It is in the direction of musicians taking on the responsibility for their own careers and for the growth of their organization. That strikes me as powerful.

Swanson: I want to talk a bit about how the proposed BHAGs already affect day-to-day operations around here. About six months before we went public with the announcement of Zdenek Macal’s final contract as music director, we were aware of it internally and assembled a group of trustees, five musicians, Larry, and me to explore the whole issue of artistic leadership. We did go rather far down the path of looking at alternative structures and thinking in terms of not replacing the music director per se. I think we’ve come to the conclusion that it is most important to find the right fit and keep our options open. But one of the strong values that came out of those discussions was a commitment to significantly increased involvement from the musicians in the decision-making processes of artistic leadership. Yes, we are looking for the best musician to lead this orchestra artistically. Yet at the same time, we are also looking for somebody who can work within the culture of this organization which includes the empowerment of musicians in a way different from what some music directors have come to expect.

Tamburri: We are also trying something else that is new to us. As an experiment, we have created a task force, and we have encouraged musicians to be part of it, to help with planning the 2002-2003 season. The task force will work for six months and we will see how it goes. Their next job will then be to evaluate what the process was like and how well it worked. Then we will know whether we

have a model that we can use into the future when we do engage artistic leadership.

And there is something else that I need to add here that gets to a really important issue. That is Abraham Maslow's model of self-actualization. If your life in an orchestra is sitting in the middle of a section and playing, self-actualization becomes a difficult goal. It is possible, but it is hard to do. The idea of people taking responsibility for their own futures adds a great deal of meaning to people's lives. One of the ideas that we talked about in our negotiations was finding ways that musicians can feel engaged in the organization and why that concept is important.

Institute: It is our understanding that you have used part of your Mellon Foundation support to pursue areas of professional development. Please explain that for our readers.

Wagner: With annual funding of \$75,000, we have established a program under which both staff and musicians can submit proposals for personal, professional, or leadership development. Several musicians have received grants to study their instruments with teachers of their choosing.

Bauer: We also have one musician who is working toward a Ph.D. as part of this program, and a second who is working toward a certificate in arts administration. So individual development does not specifically need to be development as an instrumentalist.

Tamburri: One of the proposals that was most interesting to me came from a member of the woodwind section who brought the entire section together for a day to discuss communications and teamwork.

Stucker: There is another program that we should mention. And that is our REACH program which stands for Resources for Education and Community Harmony. We developed that program for a couple of reasons. It was a way to add a week of work for the orchestra, and it was also a way for musicians to design what that work could be. The musicians have input and submit proposals that include everything from regular chamber music concerts to outreach programming. We now have so many projects going on that we've had to hire a staff person to help manage this program.

Swanson: One observation that I would make about REACH is that it is challenging to change the culture of "doing what you're told to do." Musicians are given schedules that say "show up here, play this," and so on, in an environment that involves a lot of hustling for freelance activity on the side. To find the time to be creative and to take control of their artistic lives in the REACH program has been a real challenge for many members of our orchestra. The program is now

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in its fifth year and I think we are still in the early stages of the potential development and realization of that part of the goal.

Stucker: When we started the program, we modeled it after the Saint Louis Symphony, which is a full-time orchestra. The incentive there was the opportunity for musicians to do something different. Because the NJSO is not a full-time orchestra, we have found it difficult to motivate some of the musicians to initiate their own programs.

Spitz: Let me comment on that, Susan, as a younger musician in the group that is meeting today. There are things that I do want to do, and knowing that the funding was there, I thought I would be someone who was particularly motivated to try something. But the reality is that right now I can't. And my resistance is not philosophical. I am a parent. I work all the time. And I just cannot add one more thing to my schedule. I would also add that there are a few musicians who do have a philosophical objection to a program that has the potential to put us in a more entrepreneurial role.

Institute: As we come toward the end of our time together, let's go around the table and ask each of you to consider the one or two things that you would most like to see the NJSO organization accomplish in the next five to ten years. Victor, let's start with you.

Parsonnet: We have talked at length today about some positive and comfortable things that are well on their way to being woven into the fabric of this orchestra. The uncomfortable position is our finances. That is a constant worry. We are about to begin an endowment campaign and when we achieve our goal, this institution will be much more stable.

The other dream I have is to increase our season to become a full-time orchestra. I just curdle when I hear someone say part-time orchestra because it conjures up the image of being here one day and not the next. And this orchestra does not deserve that image. So the next time we meet, I hope we are all telling you about our full-time orchestra!

Wagner: My dream for the future goes beyond just the New Jersey Symphony. There are a lot of lessons and a lot of positives that the entire orchestra industry can learn from what we have done here. I would like to see the culture that we are working to establish here saturate other organizations as well. I am the ICSOM (International Conference of Symphony and Opera Musicians) delegate from this orchestra. ICSOM was founded with an important set of goals to raise the level of musicians in symphony orchestras in terms of the level of respect they received from both their managements and from the union. Over the years, ICSOM has achieved almost all of its goals. Our lives as symphony musicians are so different now. We next need to search for new dialogue, new levels of trust, and new goals that will make our institutions strong and thereby make us strong.

Bauer: Listening to my colleagues, I feel the need to make a background observation. In our organization, as is the case in so many, crisis was the start of change. Going back a decade, this orchestra was in bad shape. We brought in Victor Parsonnet as board chairman and Larry Tamburri as executive director. With them came the collegial ideas to change things. Then, in 1993-1994, we were virtually insolvent and that brought everyone together. What astonishes me is that we can now build on these things without a crisis. We have passed enough barriers that this process can sustain itself.

As to a 10-year vision, I am a pragmatist by nature. I think we have all the ideas we need and lots of people who are interested in doing them. But it is finances that will ultimately allow us to move quickly or slowly. So I still say the challenge is finances and what we can accomplish will come out of how well we do in improving those finances.

Stucker: I will certainly echo Vic in saying that the finances give us the freedom to do things. But my dream is to see the number of players we have on contract grow. We need to make that number larger in the next five to ten years. Also, I would like to see the artistic reputation of the orchestra be recognized nationally.

Terhune: Often, when I walk down the street, someone will say to me, "What's in there? A machine gun?" When I explain that it is a viola they usually say, "Cool." Then they ask what organization I play in. My dream is that when I answer that I play in the New Jersey Symphony Orchestra they will know exactly what I am talking about. I guess my dream is that we are not only recognized nationally, but also recognized in our own communities.

On a smaller level, my other dream would be to have much more of an investment in really fine children's programs. That is one of the areas that needs to be built up.

Tamburri: First, I truly believe that, as an organization, we can accomplish anything if we can replace, in everybody's mind, negative energy with creative energy. So that's one thing I would like to see happen. And then I think we have to finally build an institution. That means we need a real home for the symphony where everybody in our institution can feel the pride of going into our home and activities can take place constantly in that location. We need to have a major endowment fund to be an institution. We need to have a proper lifestyle for our musicians, to be able to pay the money necessary for a proper lifestyle. And we need to greatly expand our education programs. I guess dollars are on my mind today, too.

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Herman: One of my great hopes is that over the next 10 years the orchestra can help individual players address what they need for artistic growth, not just over a season or two, but throughout their careers. The ability to do that comes from

working with other people in other situations. I have had the opportunity to work with another fine group for an extended period of time, almost two years. While I was not playing here, my career commitment was certainly still to the New Jersey Symphony, and I learned so much from my time away that I was able to bring back here in a positive way. I am thinking about writing a Mellon Foundation grant proposal to explore this idea for others, and I really wish we could figure out how to address this idea in a contract. Our contract provides for leave of absence, but creating exchanges between organizations is not addressed in a concrete way. So my vision of the future would include symphony orchestra organizations talking with each other about opportunities for players to trade places among different groups.

Spitz: It's hard to be near the end of the circle and to have listened to so many positive ideas which I share. But let me add this. At this point, our success as a culture has much to do with the individuals involved: both Victors, Larry, Bob, Karen, and Susan. These individuals have been instrumental in our ability to make the progress we have made. My hope is that in 10 years the sense of trust, communication, and collaboration will be so ingrained that it won't depend on specific individuals. Only individuals who embrace our ideas will want to work here as musicians or staff, or to join our board. Positive culture will be depersonalized and institutional.

Swanson: As the last one to answer, I thought for a minute there that I was still going to have something to add that had not been said. But it was not to be. So let me agree that the biggest blip on my radar screen is the concept of developing an institution. Part of that is developing a culture, as Jonathan has said, that lives beyond all of us. An institution also leaves behind patterns that have grown out of crisis management and becomes one that consistently functions well and communicates well. We have a strong sense of family with the orchestra and trustees, and to a lesser extent with the staff. But there is still a lot of head room with our donors to create a family of pride, of total belief in this institution. That would be palpable and would feed some of the recognition ideas that Chris talked about.

Wagner: I know I have already had a turn, but as we have gone all the way around the circle, it is interesting that no one mentioned the artistic aspect of what we are doing. Maybe we just take that as a given. However, I think it is something on which we always need to focus. Certainly as musicians, it is our goal when we sit down to play every night to strive to higher artistic levels. We may just assume that fact, but it needs to be said.

Institute: This has been a very heartening conversation and we thank each of you for your time. Your hopes and aspirations, and your determination to collaborate and communicate serve as models for the entire industry. We congratulate you and all of your colleagues on working to build a fine orchestra, a fine organization, and a fine institution.