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## The Oregon Symphony: A Journey of Transformation

A Roundtable Discussion



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# The Oregon Symphony: A Journey of Transformation

## A roundtable discussion

**F**or the Oregon Symphony, the 1980s and early 1990s were years of change. In the early 1980s, the symphony became a full-time orchestra, making it the primary occupation for its musicians. Not many years thereafter, deficits began to build and relationships began to sour. One manager moved on, a board member served as manager for more than a year, and during a third manager's first contract negotiations, the orchestra was locked out. Could things possibly get worse? Unfortunately, the answer was yes. However, in 1997, the Oregon Symphony began a journey of transformation.

In February 2000, Fred Zenone, vice chairman of the Symphony Orchestra Institute, paid a visit to the Oregon Symphony. He had followed the events of the difficult years and was pleasantly surprised by what he found in Portland. He invited four members of the orchestra family to participate in a roundtable to discuss where they had been, where they are now, and where they are going. At this point, we will let them pick up their story.

**Institute:** Let's begin by asking you to introduce yourselves and telling our readers about your involvement with the Oregon Symphony.

**Joël Belgique:** I became principal violist with the orchestra in January 1997. I chair the orchestra committee, although my term ends as the new season begins. I also teach at Portland State University and Lewis and Clark College and am active in chamber music performance.

**Lynn Loacker:** I currently chair the board of directors for the Oregon Symphony. I became board chair in 1997 and have served on the board for 10 years. I also serve on the board of the Oregon Symphony Foundation.

**Fred Sautter:** I'm principal trumpet, an ICSOM delegate, and have served on the negotiation teams in 1996 and 2000. I've been with the Portland Symphony for 32 years which makes me the resident historian for this roundtable.

**Tony Woodcock:** I became president of the Oregon Symphony in December 1998. Prior to that I was managing director of the Bournemouth Orchestras in Great Britain for eight years. I am a violinist and have spent 25 years in arts management.

**Institute:** The year 1996 was a particularly difficult one for the Oregon Symphony. Fred and Lynn, you were involved with the orchestra at that time. Explain to our readers what happened.

**Sautter:** Following the lockout, we got yet another new manager and things seemed to be going well for a while. However, you need to understand that there was still a good deal of distrust because of the lockout. As time progressed, the grievances began to mount and that brought us to the negotiations of 1996. On the surface, it appeared that everything was rosy with increased ticket sales and so on, but what we actually had was a dysfunctional relationship between management and musicians. The bottom line was that the musicians went on strike.

**Loacker:** I was on the executive committee of the board at the time and I still didn't feel that I had all of the information that I needed. And certainly none of the background that I needed to make some of the decisions we were being asked to make. I remember thinking, "The musicians are trying to get blood out of a turnip. Why don't they understand this?" Well the reason they didn't understand it was that there had been no honest communication about what the finances really were. And even if there had been information sharing, no one would have trusted the information because management, at that time, was very selective in what information was shared. The strike was a wakeup call. And although some people say it was a horrible thing for us to have gone through, to me it was a necessary evil. It was a turning point because we clearly could not continue to do business as usual. Very shortly thereafter, I became board chair.

**Institute:** What thoughts were on your mind as you stepped into that role?

**Loacker:** When the strike ended, I thought everything was going to be just fine. But then several members of the staff left the organization. And I thought, "Maybe this won't be quite such a walk in the park." But my main hope and goal was to improve communications among all of the constituencies.

**Woodcock:** What Lynn brought to the organization was intuition, personality, and style. I don't think she needs to think about these things. She just does them.

**Loacker:** I was determined to improve communications and began by just talking and listening to people. I had many conversations with musicians and I was much more hands-on in day-to-day situations around the office. We had had corporate people as board chairs for a very long time. So, of course it was going to be different because I don't have a corporate background and wasn't coming from that angle.

**Institute:** And then, Tony, you joined the organization shortly after Lynn became board chair?

**Woodcock:** I characterize it that I came in on the surf of what Lynn was creating. Lynn started in 1997 and I began in December of 1998. One of the first positive

things that happened was the search process itself for my position. The orchestra was consulted and was asked to nominate two members of the search committee. From my side of the table as I was being interviewed, I felt that this was building bridges.

**Loacker:** We had representation from all of the “arms” of the organization. Through our process, we came up with a common view of what qualities our new president needed to have. The whole group wrote out words that would characterize the type of person we needed. But the important point is that we made sure that everybody who needed to be at the table was there.

**Belgique:** I started here in January 1997, after being a member of the San Diego Symphony Orchestra for three and a half years. And I would have to agree that there was a lot of distrust when I first came. Not just between the musicians and management, but among the musicians themselves. At the time, I found it surprising that some of my colleagues had not spoken to each other for years. The search for a new executive director was a perfect opportunity to do things differently. When the search committee was down to three final candidates, a group of six musicians, who had been chosen using a sign-up, was asked to meet with the candidates over lunch. The search committee took our input and opinions seriously and, ultimately, the selection was the musicians’ choice. This group of musicians, as well as the rest of our colleagues, felt that this process was a positive one.

**Sautter:** The important point here is that the musicians—not just the musicians who were directly involved, but the orchestra at large—knew that we were involved in the decision-making process. This was very important in developing the air of openness that we now have.

**Institute:** Tony, were there any thoughts that you brought out of a different organizational culture in England that helped the Oregon Symphony address their issues?

**Sautter:** Tony is far too modest to answer that question. You need to understand that this orchestra had not only come to the point that people were not speaking to each other, there was actually sabotage going on among the musicians. We desperately needed someone of dignity, of patience, someone with knowledge of and experience in our business. In other words, a complete human being.

**Loacker:** Tony listened. In the beginning, he had numerous meetings individually with the musicians. He shared information and was available to listen and to answer questions. Tony builds trust by sharing information, by being consistent, open, and honest.

**Institute:** As we understand it, there then came to be more formal groups. The 2000 Plus Committee. The Collaborative Task Force. A group that worked on the Strategic Plan. Tell us about those.

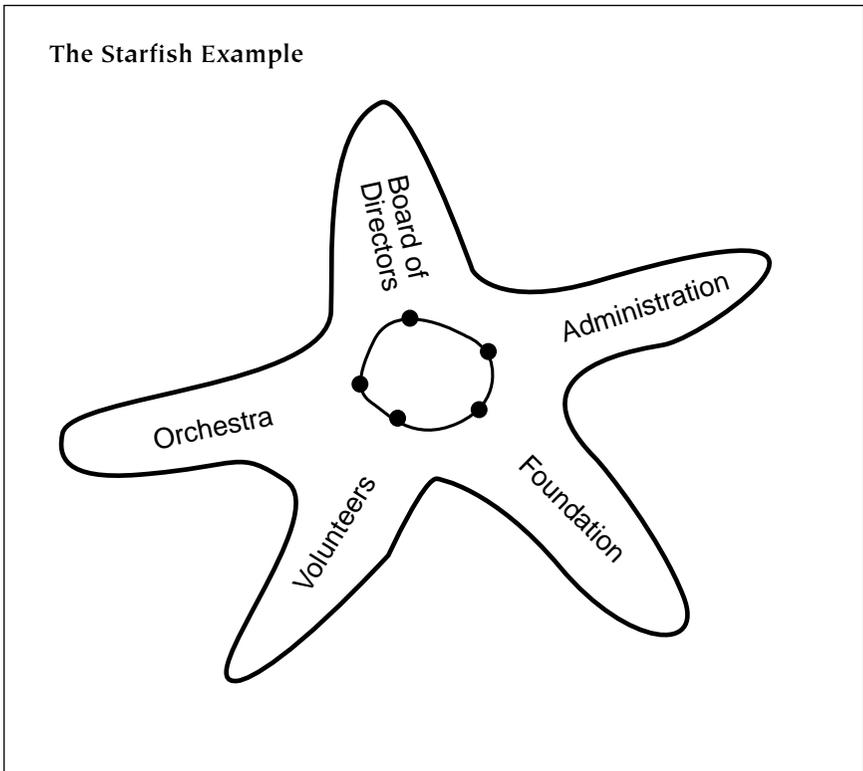
**Loacker:** The 2000 Plus Committee and the Collaborative Task Force were already meeting in 1997. The 2000 Plus Committee actually came out of a grant we

received from the Knight Foundation’s Magic of Music initiative, and included having one of their consultants, Bill Keans, work with us to see if we could get a group together and actually begin to communicate. Board members, staff, musicians, and conductors had the opportunity to sit at a roundtable with no agenda, and no project to accomplish. And Bill helped us to understand that there were many layers that had built up and that we needed to “peel away the onion,” as he described it. That was the beginning of our learning to communicate more effectively. The Collaborative Task Force was another small group of board members, musicians, and staff formed to address our financial picture in 1997.

**Sautter:** And then, with the help of the Symphony Orchestra Institute, Saul Eisen came in as a scholar in residence and helped us explore our issues and communication or lack thereof.

**Loacker:** Saul did a residency in which he visited us for two days each month for six months. Although he was technically here as an observer, he spoke with everybody. This was another opportunity for many of us to vent and begin to address some of the issues. And he left us with a “starfish” metaphor that we are still using.

**Institute:** Explain the metaphor for our readers.



**Loacker:** The idea is that the organization can be likened to a starfish, with each arm representing one of our five constituencies. Scientists have studied the function of the ring of five interconnected nodes near the center of a starfish. When the nerve ring is intact, and all five arms communicate, the starfish can decide to move in one direction or another. When the central nerve ring is severed, the arms react independently to multiple stimuli, and the starfish tears itself apart. That's a pretty vivid reminder that has stuck with a lot of people. It is very helpful to understanding the need for a core of communication and how important it is for everybody to be on the same page.

**Sautter:** Saul was very easy to talk to, was a great listener, and knew what questions to ask. And I think the study took place at a crucial time for our benefit. We needed some guidance as to what to do and how to do it. The starfish metaphor really is vivid for us. If the five segments of this organization are not communicating around the outside of the circle, then trouble begins. This is almost a complete turnaround from where we were.

**Institute:** We also understand that you have developed an 83-page strategic plan which must have been an enormous amount of work. How did that come about and who was involved?

**Woodcock:** It arose from need. Lynn has mentioned the need for communication. And out of our need for communication came a need for knowing where we were going. As an organization, we needed to be on the same page. Now, I could have sat in my office over a weekend and written it and then showed it to everyone. But that would have been my report and my strategy. And no one at all would have signed up to it. It wouldn't have taken long to write, but we would have spent months and months fighting, and persuading, and cajoling.

Instead, we went into a very detailed, arduous process which was meant to bring together the five arms of the organization, so that when a final strategy was produced it would be as a result of everyone's input. And everyone would buy into it for the future. I describe it that we had to go slow in order to go fast.

We involved a consultant, Elaine Cogan, who is well known in Portland. She talked about a process that should involve everyone and suggested that as part of the process we should have a minimum of two family days where everyone would get together to discuss ideas. And that is exactly what we did.

At the beginning of the process, we had a family day at a hotel and 112 people attended. At the second family day, which concluded the process, well over 140 people attended. Those were full-day meetings. Everyone was there. The musicians were there. The staff was there. The board was there. The volunteers were there. The conductors came along and it was very, very positive for the organization.

The strategic plan, all 83 pages of it, was ratified last November 16. And everyone has a copy. We use it not only for direction. We use it to raise money. We use it to sustain relationships in the community. We use it for really positive

messages. The steering committee that took us through the whole of this was representative of all of our constituencies, and from small beginnings that idea of inclusion has permeated our whole organization in a very strong way.

**Sautter:** Let me speak from a musician's perspective. Through this process I met all kinds of people who had been around the orchestra for years but whom I did not know. I made some very good friends. A woman who is a judge here in Portland, and whom I have admired for my entire tenure here, has become a dear friend. We saw each other's sweat for so long that we got to know each other really well. This process allowed us to be candid at a level I would have never expected. When we had problems we couldn't solve in a large committee—which can be cumbersome—we formed subcommittees or small task forces to deal with them. We shared sweat and toil to come up with solutions. In each and every case, our solutions included the collaboration of all of the parties involved.

**Institute:** Joël, you are relatively new to the orchestra, but you must have been orchestra committee chair through part of the process that resulted in the strategic plan. What role did the orchestra committee play?

**Belgique:** We were very involved from the beginning. We were involved in everything from choosing a consultant to reviewing the final draft. But I think that the main job of the orchestra committee was to make sure that the rest of the orchestra had a good idea of what was going on. We wanted to excite the musicians into taking part, into taking ownership, and into the whole plan itself. I think I speak for most of my colleagues when I say that the strategic plan is a working document and is not a dust-gathering piece of paper. Each element has a thesis statement which defines the goal, followed by a statement of strategy. It then lists the persons or groups responsible for seeing the element through, including timelines for review and evaluation.

I think the role of the committee has evolved as a result of this process. People who hadn't been the best of friends were finding the energy to talk with each other. We organized an ad hoc committee of musicians representing all corners of orchestral politics simply to elicit dialog and bring people to a better understanding of one another's views. The musicians were included in Tony's hiring, we were included in the hiring of a general manager, and we are very much part of the music director search. All of these actions have helped to affirm that we are part of the organization. And I would add that many of the younger players who were hired in the last three or four years have assumed committee responsibilities, and so have some musicians who had said that they would never serve again. They are coming back and participating.

**Institute:** Lynn, what effect did this process have on the board?

**Loacker:** At the time we began the strategic planning process, our board had nearly 50 members. As is usually true with a large board, a small group ends up doing a lot of the work. But board members wanted to be part of the process,

especially the family days. Members of the foundation board were also involved. As Tony has related, the family days were very successful. It was fun to hear board members say that they had learned from the musicians, or from the telemarketers. We all had a deeper understanding and appreciation of what was going on in the organization and of each other's roles.

**Institute:** In reviewing the strategic plan, it appears that there are to be changes in board structure. Would someone explain those?

**Loacker:** We've adopted a new board structure that will have a larger executive committee which will be involved in more of the day-to-day operations, and a group of community members who will be involved on a variety of committees.

**Woodcock:** It is the plan that musicians will have two places on the executive committee.

**Sautter:** We are in contract talks right now—I'm on the negotiating team—and we've discussed this. It is my belief that this will be acceptable to the musicians.

**Woodcock:** Having musicians on the board is a continuation of the commitment to open communications, to an open decision-making process. It is one thing to be observers, which the musicians are now, but to be voting members of the executive committee is a very deep manifestation of trust.

**Institute:** The Oregon Symphony currently has a search under way for a music director. It is our understanding that you are following an unusual process. Can you explain that to our readers?

**Woodcock:** When I came into the organization and began to get to know the orchestra as individuals, I very consciously decided that the musicians had to be the majority shareholders of the search process. So the music director search committee involves seven musicians, which is a majority. Some of my distinguished colleagues from other orchestras think that I am mad to do it this way. But I feel that it is very appropriate to our future here in Oregon.

When we opened the process, anyone could nominate a candidate. At our first meeting, we were faced with a list of 72 conductors. The search committee, particularly the musicians, have worked very hard to sift through those names to learn a great deal about these conductors. It has been a fabulous process. We now have a short list of 12 known applicants. The first six will come through this season, and six more will appear next season. And then they will come back again in years three and four. This process has galvanized the orchestra.

**Loacker:** As a board member, it had always been my perception that a music director search happens very quickly, that it is a mad dash to fill the position. And I am sure there are other board members out there who have that perception.

**Belgique:** Musicians have very strong opinions about who is on the podium. We play differently for different people. Musicians may not know as much about the marketing potential of a potential music director as board or staff members

might, but I am convinced that if we have a conductor who excites and inspires the musicians, the result will be demonstrated in the way we perform, which, in turn, will bring more people into the house.

I also want to mention that the search committee agreed that we would not let the conductor just choose the programming. We did not want conductors to come in and do only what they do best. Each has been asked to submit choices from which the search committee will make a selection, and each has also been asked to conduct a classical-period concerto.

**Institute:** Lynn, does this search process make sense to you as a board member?

**Loacker:** With the exception of perhaps one or two people, our board members had not been through a conductor search, didn't have a clue as to what the process should be, and were open to Tony's suggestions. Initially, some of us wondered about why we were going to take five years. But the explanations made sense. It is understandable that a conductor can be on his or her best behavior for one performance, and that we need to see our candidates in a variety of situations. We also recognize that we cannot just ignore our current conducting staff and give the entire season to guest conductors. And we certainly understand why the musicians have a large vested interest in the outcome.

**Institute:** We are approaching the end of our time together. Are there any other thoughts that you would like to add?

**Sautter:** Yes. I mentioned earlier that we are currently involved in contract negotiations. And we are doing Interest-Based Bargaining. We bring board, management, musicians, and the union into the same room together. This morning we tallied up that we have been together for between 200 and 250 hours of talking during this bargaining process. We know that IBB is a very slow process. But the direct result is that we are all talking together on the same plane, sharing all of the information. No one is in the dark. We are making decisions together.

As a musician who has been here 32 years, I can tell you that there is a sense of trust coming out of this process that will build the future that Tony has talked about. When we add to the mix the artistic vitality we hope to have, we can look forward to good health for this organization so we can be the best that we can be.

**Loacker:** We have come a long way, but I see so much potential for doing more in the future. A lot of that has to do with some of the things that we are discussing now in IBB. But it starts with communication, with trust. We are building toward an organization in which everybody can talk openly and honestly with one another about what is going on and what needs to be done. Those developing relationships are important not only internally, but also with the community. The community needs to see what a vital, important aspect of their lives we represent. If we bring to them health—in relationships as well as in finance—that is an important contribution.

**Woodcock:** I know that one of the Institute's objectives is to share information with orchestras to see if what one orchestra does might be applicable to another. Let me relate two very positive experiences we have had as part of the IBB process. First, when we decided to share budget information, we, as management, took a very deep breath because it had never been done that way before. The musicians would receive any information for which they asked. We have honored that, and the musicians probably have more information than the finance committee. Through that sharing of information came understanding, followed by an acute awareness of where we are as an organization. I thought that was a terrific process.

Secondly, we involved Lynn, as our board chair, the chair of our foundation board, and the board member who chairs our liaison committee on the negotiating team. I think the success of our discussions has been largely due to their involvement. They have not said the wrong things. In fact, they have said the right things. They have challenged management as well. When the board members have felt that they did not have enough information, they have asked for it so they are better prepared for the next meeting.

I would encourage people to take that line for the future. Because it means that to the musicians, the board is no longer a "gray eminence" somewhere in the background. The musicians have a direct line to the board chair and other members of the board. Through this process of discussion, they can affect attitudes and can communicate at the level they desire.

**Sautter:** The only wrinkle that I would want to identify is to again mention the monumental time commitment. As the discussions have continued, there has been honor and respect, and we do formal updates when someone has been unavailable for a meeting. In the future, the time commitment may be less because the friendships we have formed will sustain us through separations, and will allow us to get back together more quickly because we have worked well together before. We still have a lot to fix, but we are well on our way and I feel very good about that.

**Institute:** What a positive note on which to end this conversation. We thank you very much for your time and know that the Oregon Symphony's organizational development over the past three years will provide food for thought for many of our readers.

## Healing the Starfish

When the Symphony Orchestra Institute invited me to participate in its Scholar in Residence program, I was both pleased and apprehensive. While I had three decades of experience as a professor of organizational behavior and as a consultant to a wide range of organizations, I had not worked with orchestra organizations and knew little about them. I sensed, too, that my presence and involvement as a learner would not be invisible, and would inevitably have some effect on the organization—hopefully a positive one.

In retrospect, the residency experience with the Oregon Symphony did give me a unique opportunity to learn about this organization, and to some extent, about orchestra organizations in general. There are some ways, too, in which I was able to serve as a sounding board for the individuals and groups I interviewed. I sensed as we talked that their experiences, perceptions, and assumptions were being amplified, reverberated, and made more available for reflection and self-awareness.

Tim Scott, who was then chair of the orchestra committee, was part of a group doing ongoing planning for my visits, and he arranged meetings with the committee he chaired. Fred Sautter was very helpful in arranging informal gatherings with musicians representing a range of views—including people who perhaps would otherwise not have agreed to talk with me at the time. I also simply sat in and observed a number of regular meetings.

### Listening and Learning

When I observed group meetings, my approach was to attend to what each group was attempting to do and how it was doing it. I was openly curious about the task and function of each group, in the context of the larger organization. This is essentially a neutral stance—not particularly looking for problems to solve or improvements to suggest, but simply noting the group's behavior as it is. Similarly, in talking with individuals I was interested in understanding their unique ways of perceiving and experiencing themselves and the organization.

I learned of the successful growth and development of the Oregon Symphony over the last two decades, under the visionary musical leadership of James

De Preist and two other uniquely talented and energetic conductors—Norman Leyden and Murry Sidlin. The transition to new musical leadership, however, was not evident to me at the time.

I heard in great detail about a history of difficult experiences related to financial pressures, a painful strike, operational snafus, the limitations of the concert hall, and low morale among many members of the orchestra. As I talked with musicians, board members, managers and administrative staff, and volunteers, I became aware of a low level of trust between individuals and groups. I noticed, too, a number of ways in which distrustful assumptions and group stereotyping were leading to a high incidence of misunderstandings, which only fed the mistrust and stress people were experiencing.

I recognized this pattern as one that is endemic to other kinds of organizations—whether in the arts, service, manufacturing, or technology; I have certainly seen it before. Many organizations have functionally separate constituent groups, such as marketing, operations, and finance—or in this case, the orchestra, management and staff, the board of directors, and volunteer organizations.

There is a tendency for each group to develop its own subculture and shared assumptions. The other groups are seen as adversaries, their members are stereotyped, and their motives are suspect. They each have their own priorities and ways of working. They are often housed in separate buildings and may seldom work together or even see each other.

Under these conditions it is not unusual to develop patterns of adversarial distrust for the other groups. When people are caught in such patterns they tend to personalize the problem as being caused by the other side—as a group or as individuals. The underlying fragmenting structures, however, are not acknowledged or understood; they hear the notes but not the music.

## **The Vicious Circle**

This kind of repetitive pattern can be understood as a vicious circle (or more technically, a regenerating feedback loop). A high-stress/high-pressure environment tends to breed incomplete or distorted communication. This leads to frequent misunderstandings, which feed mistrust, which in turn amplify the pressure and stress, and so on. People caught in such a vicious circle tend to feel trapped and hopeless. And indeed, if no change is introduced, things only get worse.

But there is a hopeful irony in discovering such feedback loops, because for the same reason that they work in one direction they can work in the opposite direction—toward improvement. For example, if new activities or structures provide opportunities for valid communication across groups, there can be more mutual understanding, which allows trust to build. This leads to reduced stress, which in turn reduces the tendency to miscommunicate and misunderstand, and so on.

The story of the starfish that Lynn Loacker describes was my attempt to explore with her, and then others at the Oregon Symphony, the possibility of shifting attention to the underlying patterns in their dilemma. It is a very dramatic metaphor in the sense that it describes a fundamentally self-destructive pattern. She and others resonated strongly to the starfish metaphor, to a large extent because it connected with and supported their own emerging awareness of the nature of the problem. Indeed, activities like the 2000 Plus Committee and the Collaborative Task Force were structured specifically to bring constituent groups together around shared values and goals. These seemed to me to be very positive and productive initiatives, attesting to Lynn Loacker's perceptive leadership.

Similarly, the search for a new president was guided and informed by a participative process across constituent groups. The fortunate selection of Tony Woodcock for the position reflects the shared awareness of the importance of moving toward a style of management that supports healing of old wounds and collaborating across constituencies. Indeed, he provided the needed leadership in the strategic planning process that has developed a new sense of direction for the whole organization, and a framework for continuing monitoring and decision making over the critical next few years. Again, the fact that a strategic plan was developed not by a few managers in a board room, but through an open process that brought together all the constituencies in a large-group format is indicative of his competent and effective leadership away from fragmentation and toward integration.

The same can be said for the wise initiative to use Interest-Based Bargaining. Rather than waiting for contract talks to begin and to predictably deteriorate into adversarial polarization, IBB has provided a forum for cooperative problem-solving toward shared goals. The monumental time commitment involved has been an investment in mutual understanding and healing.

The transformative process is not over, though it has developed a significant momentum. Perhaps the starfish, with its healing nerve ring, is beginning to function and thrive as a whole organism.

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## Oregon Symphony Strategic Plan: A Consultant's Perspective

**I**n my 25 years as a strategic planning and communications consultant with nonprofit organizations, I have rarely been as gratified and exhilarated by a process, and a product, as I have been from my recent work with the Oregon Symphony.

When we began, the organization probably was as disparate as I have seen, with each segment going its separate way, intersecting with others only when necessary, and even then, reluctantly. The strategic planning process we developed could not have worked without the full cooperation and participation of all members of the symphony “family.” As musician Fred Sautter notes in the roundtable, this all takes hard work and a significant commitment of time. I think everyone was surprised at the level of both we obtained and sustained as the process unfolded.

There were several keys to success. A significant contributor was the Long Range Plan Steering Committee, comprised of 17 representatives from every facet of the symphony family: board, foundation, staff, volunteer associations, and musicians. Except for the artistic director, whose schedule did not allow him to attend any meetings, steering committee members were very conscientious in carrying out their commitments. After previously interviewing them and other key people in and outside the organization, I suggested a planning process that would consider all the most important issues that needed to be resolved.

At the first meeting of the steering committee, there was an obvious wariness and tension in the room. This was to be expected, as many of these people had never before sat down together. It also was obvious, however, that one matter united everyone, from the women’s association representative, who has been a volunteer for the symphony for more than 40 years, to the newest staff member who had been on the job only a few months: love of music and of the Oregon Symphony. From June to November 1999, the group met regularly and intensively. I facilitated many, sometimes heated, discussions, during which steering committee members crafted statements of mission and values, and finally, specific action plans that were then taken to the entire symphony family for modification and ratification.

Another key element of success was the leadership among all parts of the Oregon Symphony family. They not only dedicated themselves to the process, but enthusiastically spread the word to their constituents and elicited their support.

## **Symphony Family Meetings**

Two other significant keys to success were the symphony family meetings, the first held midway through the planning process, and the second held toward the end of the process. True to the guiding principles for the process, as exemplified by the inclusive steering committee, everyone associated with the symphony was invited to two all-day sessions held in a local hotel. To nearly everyone's surprise, more than 100 people attended each time. At each family meeting, participants were seated at round tables of 10, each having a predetermined complement of musicians, board members, staff, and volunteers. Once again, as with the steering committee, people were delighted to meet others whom they did not know, and all were united in a love of music and of the Oregon Symphony.

At the first family meeting, after a briefing about the process and the preliminary work of the steering committee, attendees, at their small tables, discussed these questions:

- ◆ In the best of all worlds, five years from now, describe the Oregon Symphony.
- ◆ What factors help or hinder us from reaching those ideals?
- ◆ How can we overcome our problems and make the most of our opportunities?

Each discussion was facilitated by a steering committee member. The many good ideas were then taken back to the committee for further refinement.

Several months later, at the second family meeting, attendance was even greater and more enthusiastic as the word had gotten around that this strategic planning process was really going somewhere and everyone's opinion counted. At this all-day session, attendees were once again preassigned to tables to ensure variety, and this time, many greeted each other as old friends. They considered elements of the strategic plan proposed by the steering committee, with the assignment to review, delete, or add as they thought appropriate.

## **Moving Toward a Final Plan**

The steering committee considered all these recommendations seriously and made modifications which were then considered at meetings of each group of family members (staff, musicians, volunteers, etc.) led by steering committee members. The final plan was once again revised and forwarded to the board, which unanimously adopted it and its many action items. One unanimous and unexpected recommendation that resulted from the planning process and excited

everyone was a call for steps to consider finding a site and raising funds for a new symphony hall. This is being enthusiastically pursued.

When I first proposed this ambitious process to the Oregon Symphony, there were serious doubts that anything of real value could be achieved. As readers can see by the comments in the accompanying articles, the process worked. The resulting strategic plan and action agenda is a serious, supportable, and achievable document which has many proud parents. It has been a pleasure to work with them all.

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