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Cultural Change in the Pittsburgh Symphony Organization

A Roundtable Discussion



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Cultural Change in the Pittsburgh Symphony Organization

A roundtable discussion

The Pittsburgh Symphony Orchestra (PSO) faced harsh fiscal realities in early 1997. The orchestra formed a task force to review a revised business plan. A member of that task force, Tom Witmer, a PSO board member and chief executive of a company widely recognized for its approach to total quality management, suggested the use of a Japanese planning method, “Hoshin.” The PSO adopted this technique to address specific goals toward which musicians, board members, volunteers, and staff could work jointly.

In the October 1998 issue of *Harmony*, we reported on the early stages of the use of the Hoshin process. Two years have passed since the *Harmony* report, and three years have passed since the PSO’s first Hoshin meeting. The Hoshin facilitation team recently met with the Symphony Orchestra Institute to review the organization’s progress, current status, and future outlook.

Institute: We are eager to learn of your progress since you adopted Hoshin. So please introduce yourselves and we will begin.

Scott Dickson: I’ve been with the orchestra for three years, and am currently the PSO’s manager of the Pops and Heinz Hall Presents series. I hold degrees in piano and voice performance and maintain an active performance schedule as an accompanist.

Hampton Mallory: I am a cellist in the orchestra and currently chair the Access Music team. I am also a board member of the American Symphony Orchestra League.

Ron Schneider: I am a horn player, and have served as chair of the orchestra committee, a representative to the PSO board, and a member of the board of advisors of the Symphony Orchestra Institute.

Linda Sparrow: I am vice president of education for the Pittsburgh Symphony Association, the orchestra’s largest volunteer organization. And I am also chairman of PSO Outreach for the Northern Allegheny area.

Bob Stearns: I’m the president of an organizational development consulting firm and the director of human resources for CoManage Corporation. I also

serve the PSO as its Hoshin facilitator. My professional life is dedicated to developing and implementing strategies to develop high performing organizations.

Kathy Kahn Stept: I am a member of the executive committee of the Pittsburgh Symphony Society board and chair of the volunteer leadership committee.

Tom Todd: I am currently president and CEO of the Pittsburgh Symphony Society. In my “day job,” I am a partner with a law firm, practicing in the area of mergers and acquisitions.

Gideon Toeplitz: I have been executive vice president and managing director of the Pittsburgh Symphony Orchestra since 1987.

Rudolph Weingartner: I am a member of the Board of Advisors of the Pittsburgh Symphony. I’m a retired philosophy professor, former dean of arts and sciences at Northwestern University, and former provost of the University of Pittsburgh.

Institute: Think back and explain to our readers what life was like in the Pittsburgh Symphony in pre-Hoshin times.

Toeplitz: Before we started Hoshin, we were in the same position that many of our orchestral colleagues are today. We focused very much on labor relations and tried to resolve a lot of unnecessary confrontations. Our energy was going in directions which were not very productive for the organization as a whole.

Mallory: Our focus before Hoshin was always either on the present or the recent past in terms of political activity—of which there was a lot between the orchestra musicians and management. The musicians tended to be in the position of reacting to what we thought was either inattention or overt malice on the part of management. There was neither a time nor a vehicle to do anything different about the future.

Todd: During my first year on the board, we were in the middle of very difficult labor negotiations which came very close to a strike. I remember Hampton Mallory, who was then chair of the orchestra committee, speaking to the board. At that time, the idea of the orchestra committee chair speaking directly to the symphony board was probably unprecedented. Hampton was eloquent and nonconfrontational when he spoke and I was really impressed with what he had to say. The point is that this was the first time we had a chance to talk with a musician about the issues facing our organization. Quite frankly, I’m surprised that we did as well as we did back then.

Schneider: Without meaning to sound flippant, I can cite one objective measure. Before Hoshin, the musicians’ union legal bills were much higher. There were always grievances on the table. There was not a lot of trust and cooperation in this orchestra.

Sparrow: I’ve been a volunteer here for 10 years, and before that had been an orchestra volunteer in Toledo and Indianapolis. It was much easier to interact with the smaller orchestras. At the Pittsburgh Symphony, I felt I was a nameless,

invisible person who worked in the building regularly. I was never acknowledged by senior staff and had no interaction with the orchestra.

Institute: Let's move forward to today. Describe the changes that you see since you implemented Hoshin.

Sparrow: Hoshin has become much more than a planning technique for the Pittsburgh Symphony. It has also become synonymous with our culture. We have keystone principles such as the fact that every member of every constituency is important and is capable of bringing valuable ideas and insights to the organization. Communication is absolutely the glue that holds the organization together. And it is really okay to have differing opinions. The four constituencies must act together as a team. Today, we are really working together and having fun.

Dickson: I want to emphasize the word "team." I joined the Pittsburgh Symphony just as we were beginning Hoshin. And I would observe that everybody has taken a psychological ownership of the institution. We do everything together—all of the constituencies—as a team effort. We communicate openly, we listen, and sometimes we disagree. We take the time to talk out our issues and ultimately come to better results.

Todd: Let me offer a concrete example of what Scott and Linda are describing. Our Hoshin number two is a task force from all of our constituencies which is currently focusing on how we can use technology to increase awareness of our classical music product outside the concert hall. In any particular discussion, I may focus more on the economics of a particular proposal or idea. David Gillis, who is a violinist, may be more concerned about the artistic integrity of the product. Susan Perrino, a member of the staff in charge of education and outreach, may have a point of view that reflects her concerns. Kevin DeLuca, our Web master and technology guru, might want to focus on technological goals. The multiplicity of knowledge and considered viewpoints increases the quality and value of what comes out of the discussions. This is not just a "feel-good" process. As an organization, we make better decisions because we have the accumulated wisdom of all our constituencies around the table to participate in those decisions.

Weingartner: Let me tack on another example. As a result of this Hoshin number two discussion, this symphony did something that I am sure no other symphony has done. We mounted a major conference right here in Heinz Hall on the relevance of music to the very earliest ages of childhood. This conference was attended by academics and practitioners from all over the country. It shed a tremendous amount of light on a topic that should interest all who have any interest in music. And it would not have happened without the Hoshin number two discussion in which there was representation from every part of the organization.

Step: I'll add an example from Hoshin number four which is trust and cooperation among the four constituencies. As a result of constituent surveys and roundtables, I have had the opportunity to be involved in the annual constituents' meeting.

The idea is to bring the four groups together to showcase their accomplishments over the past year. The last two years, the four groups have created very humorous and original ways to present their materials. In the process of planning the event, friendships have developed between individuals who had had no reason to work together before, and there has been a strong sense of achievement, pride, and fun. I should add that this event also recognizes individuals for their terms of service with the organization.

Mallory: I want to come back to the idea of a changing culture. To me the most interesting part of the Hoshin experience is that we have dropped some of our defenses. Before Hoshin, if there were two or three orchestra members in a room with management, you never heard more than one opinion from the musicians about what to do. You never heard more than one opinion from the staff about what to do. It is now fascinating to watch people express their true feelings on issues. There may be a situation in which a musician and a board member are on one side and a staff member and two other musicians disagree. The decision that comes out of that process is really a much more informed one. We don't react with knee jerks but with some really serious consideration of the issues we face.

Schneider: Hampton reminded me of another change that has taken place. The traditional view from those of us in the orchestra was that everything we did was always right; everything management did was always wrong. One of the things we have learned is to deal with the shades of gray. The Hoshin process doesn't eliminate problems or difficulties. It is a good forum for actually dealing with problems and conflicts and resolving them. And I want to add another example that is not very common in orchestras. Two members of the orchestra committee sit in on the senior management meetings. Yesterday, as I walked out of one of those meetings, the general manager handed me a copy of the budget for this year and projections for the next couple of years. For years, orchestra committees tried to get that information, but it was a secret document. Everyone is working hard to make sure we are really communicating.

Weingartner: I'd like to make explicit something that has already been said but is worth saying more forcefully. In my observation, one important thing that has changed is the fact that the staff is more independent. In the past, the staff spoke when spoken to and put their ideas forth only in private meetings with people to whom they reported. Now, staff members take part in discussions and seem to be much freer in putting forward ideas. In that sense, the institution is getting much more mileage out of people's talents.

Toeplitz: What Rudy is referring to is the fact that we have a much more democratic process. Some of my colleagues in other orchestras think that I have lost control over the organization. I have to assure them that my responsibilities have not diminished by an inch. I am still responsible for all aspects of our organization. It is just done in a much better way now. It really is more fun to work under a positive atmosphere than a confrontational atmosphere. But I would suggest that anyone who would consider entering the Hoshin process

needs to understand that it takes time. You cannot do Hoshin between meetings. Hoshins are meetings. You have to rearrange your priorities to participate in the Hoshin process. Dictatorship doesn't take time. One person makes the decision and you move on. A democratic process involves listening to other people's opinions and building consensus which by nature takes time.

Institute: Bob Stearns, you have been the "inside-outsider" for the Hoshin process from the beginning. Share with us your observations of the changes that have taken place in the Pittsburgh Symphony.

Stearns: The best way I can describe the differences between now and two and a half years ago is that the culture of the PSO when I first met them was a culture of "or." It was either this way or that way. If you were on the wrong side of the "or," your ideas were not accepted at all. Today I see a culture of "and." This is an inclusionary culture in which people are willing to listen to each other and to seriously evaluate ideas with which they may disagree in the beginning. In concert with the definition of Hoshin planning, the PSO uses the process to try to get breakthrough ideas on the table. And the PSO organization has internalized the process to the point that Hoshin is now used as an adjective to describe the way that work gets done. Hoshin has become much more than a planning process to the PSO, it has become the culture.

Institute: We get the impression that Hoshin has been and continues to be a learning experience for all of you. So what comes to mind as you look ahead? Might this organization be functioning even more effectively five years from now?

Weingartner: It is particularly important for us to be able to involve more members of the board in the Hoshin process. This is a very time-consuming process of which meetings are an integral part. It is not easy to harness board members for long meetings. In the future, there may need to be some compromises to shorten Hoshin meetings in order to involve more board members. I think that is an organizational necessity in the long run. In the short run, we have been immensely successful.

Schneider: I want to add something to what Rudy just said. About an hour ago, we were discussing some of our goals for the coming season. One suggestion was put forward which was efficient, but would have shortchanged the consensus-building process. But we all agreed that we can't jump the step. The group needs to reach its own conclusion, to feel ownership. That's part of the meetings Rudy is talking about. Even a leader who has a good idea cannot impose it on the group.

Mallory: One issue for the musicians is how do we communicate among ourselves what is going on? Communicating results of orchestra committee meetings is one thing. Now with musicians involved in so many aspects of the planning and work of the whole organization, it is even more important. And we haven't yet taken full advantage of current technology. We hope that hiring a Web master will improve our ability to get the message across to everybody.

Step: The two groups that have been most difficult to engage have been the board, basically because of their busy schedules, and the volunteers. Last year, the symphony hired a vice president of board and volunteer services. This senior staff member will help tremendously to engage board members and volunteers. I think personal attention, information sharing, and education will result in more interest and commitment to what we are doing here.

Institute: So you are saying that the Hoshin culture is helping people discover new roles that are supportive of more communication, more involvement, and more engagement, and that in itself is worth the investment of time.

Step: Yes.

Toeplitz: I don't want to put a timetable on this thought, but in the long term orchestra organizations will have much broader representation than they have had in the past. For 100 years, we have been governed by boards of directors representing limited parts of the community. If you think that in the past we have not listened to our constituencies inside the organization, we certainly have not yet listened to our constituencies outside the organization. We have not involved our audiences who are major contributors to our well being. As we look ahead, we hope to get more involvement from additional constituencies. We want to keep developing participative patterns.

Institute: All of you in this room have been involved with Hoshin from the beginning. How do you engage new musicians, or staff members, or board members, or volunteers in the process?

Stearns: One of our Hoshins addresses the new orientation procedure in all four constituencies. But there are several vehicles beyond that. Over the last year, we have done several training classes for staff on what we call internal customer-supplier relationships and teamwork. We have also done these same types of sessions with the orchestra. We have also generated three new Hoshins for the 2001-2002 season that will provide opportunities for people to get involved directly in Hoshin initiatives. It has been our experience that to really engage somebody, you have to get them involved in a specific activity so they can get the feel for what this is all about for themselves. We are trying to provide both educational and involvement opportunities to keep this an evergreen process. So far, I think it is working well.

Toeplitz: We have also done what we call Hoshin style. It is a way of saying we didn't go through the formal Hoshin process but we still use the same concept. We have used the concept in the hiring of two vice presidents and in opening a store across the street. Each activity involved representation of all four constituencies. I think that speaks for the acceptance of the process not just for the formal Hoshin, but way beyond that.

Stearns: Let me add something to what Gideon just said. One of the challenges for any organization to extend its culture is how well you do with new people coming in. That will be a consistent challenge for this organization. What we do

today is not necessarily the same thing we will do next year. This organization is well aware of the challenge and on top of it.

Dickson: As a younger staff member and one who has been here only three years, I am extremely excited about and motivated by the direction we are taking. Staff members in all departments interact with each other more frequently, both professionally and socially, and although not every staff member may have involvement in the artistic process, we all comfortably can be backstage interacting with the musicians as friends and colleagues. I foresee us being able to attract many young, topnotch people in all four constituencies who want to be involved in a progressive symphony organization.

Institute: Scott, that's an enormously positive statement. As we are coming to the end of our time together, do any of you have any concluding thoughts you would like to share?

Toeplitz: There is something very important that *Harmony* readers need to hear and think about. Some people equate Hoshin with labor relations. Hoshin is not labor relations. Hoshin is complete organizational cultural change. Improved labor relations may be a byproduct of Hoshin, but are not guaranteed. To those who would say, "Let's do Hoshin to improve our labor relations," I would say, "You are on the wrong track."

Todd: Let me see if I can sum up where the Pittsburgh Symphony is and where I think it is going. Our organization is dedicated to excellence—performance excellence in the concert hall, and now organizational excellence. To my mind, Hoshin fosters excellence in at least two ways. First, excellence requires extraordinary commitment which is more easily obtained when those involved feel empowered by the organization. The Hoshin process provides the opportunity for empowerment. Second, assuring that members of all constituencies have opportunities to be heard—not just as representatives of their own constituencies, but because of the value of their individual judgments and perceptions—improves markedly the quality of decisions. I don't know that I can identify the five or ten key issues that we will tackle in the next five years, but I am certain that we will bring this process to bear on those issues. We will continue to be in the vanguard of excellence, both as an orchestra and as an organization. I am incredibly enthusiastic about the future of this organization.

Institute: We congratulate you on the substantive progress you have made as an organization since you began the Hoshin process and thank you all for adding yet one more meeting to your schedules to share your progress with our readers. The ease with which you come together and the very personal stories you share attest to the fact that you understand and are committed to organizational excellence. We look forward to visiting with you yet again down the road.