

EQUITY, DIVERSITY AND INCLUSION (EDI) PLANNING PROCESS

INTERNAL STAKEHOLDER INTERVIEWS

Themes and Recommended Areas of Focus
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Prepared by: Jessica Schmidt, Orchestrate Inclusion



Introduction:

At the start of the 2020-2021 orchestra season, Jessica Schmidt of *Orchestrate Inclusion* was engaged as a consultant to guide the PSO in its process of assessing and aligning its internal imperatives around EDI. A stakeholder interview process was a first step in building understanding of internal culture and dynamics around EDI at the PSO, also setting the stage for future strategic choices. The stakeholder interview process was focused on hearing directly from internal stakeholders at the PSO (staff, board, musicians, conductors and some external patrons/subscribers) about their ideas regarding the state of the PSO's EDI discussion and action. Interviews provided a depth of information from across the organization while inviting stakeholders to share their opinions and observations with an external third party at the start of the PSO's formal EDI work. While gathering feedback and insight from internal stakeholders was the primary focus of the process, inviting stakeholders from across the PSO to enter into an organizational conversation about EDI was an additional goal.

The intent of this document is to summarize the emerging themes that surfaced across the stakeholder interviews, presenting a set of potential focus areas for action to the PSO. These options can then be discussed and prioritized by the organization for action. A strategic EDI plan for the PSO can be built upon the themes from this report, responding to the direct experience and feedback of PSO internal stakeholders. Falling in line with the "internal first" nature of the stakeholder interview process, the consultant recommends that such a plan be inward-focused and serve as a means to build the practice of EDI work necessary to advancing external relationships and staying fully accountable to the larger Princeton area community.

This report document summarizes the themes that repeatedly rose to the top of stakeholder interview conversations in fall 2020, framing them as potential focus areas for action and illustrating them with quotes from interviewed internal stakeholders. Each theme includes a summary from the perspective and opinion of the consultant, a set of stakeholder quotes from interviews, and a set of potential strategies for consideration. The words of stakeholders have been prioritized as the "heart" of the document. This prioritization is intended to allow stakeholders to see their contributions and experiences reflected in this step of the PSO's long-term EDI work. Reflection of this type is key in supporting increased internal engagement around EDI throughout the PSO.

The "strategies for consideration" listed under each emerging theme are meant to illustrate a small range of potential actions that could advance work in each theme area. They have been left intentionally broad and minimal to leave space for the PSO to design and determine its own actions as focus areas are prioritized. With the intent of honoring the current financial climate of the PSO and orchestra environment during COVID-19, the consultant has worked to name strategy suggestions that include actions which would require little to no additional financial resources alongside additional ideas that would require greater financial and human resource investment.



The recommended areas for focus emerge from themes across stakeholder interviews and fall into eight categories. Each is listed below (not in weighted order):

- 1. Build Shared Understanding of Key EDI Concepts
- 2. Acknowledge Fears, Reframe EDI as a Value-Added, Provide Ongoing Learning Opportunities
- 3. Expand Awareness of EDI Outcomes Impact Points
- 4. Broaden and Deepen Board Membership
- 5. Model Best Practices in Musician Selection within the PSO's Scope and Operations
- 6. Expand Upon Best Practices in Representative Programming
- 7. Examine and Reframe the PSO's Relationship with Trenton
- 8. Commit to Systemic Change

Given the current realities of COVID-19 and the moment of examination around race and white supremacy that America has entered in recent months, the consultant believes that the PSO has a crucial opportunity and obligation to be responsive in naming its own place in the historic and current racism of the orchestra field, also committing to specific action in antiracism work. What it does in the following months as the community continues to watch will impact its future viability. It is a pivotal moment for the organization to listen to and connect deeply with its Princeton area community. An intrinsic understanding of the history and tradition of orchestral power, wealth and advantage, recognition of its role in the system, and a commitment to move forward with clarity in a reimagined direction that prioritizes equity, and specifically, racial equity, will be essential for not only the recovery but the sustainability of the PSO.

Methodology:

A total of nine focus groups/interviews involving 54 internal stakeholders were conducted by the consultant in the between August 2020 and October 2020.

Group interviews were conducted with:

- PSO Board Members (two interviews)
- PSO Musicians
- PSO Staff
- PSO Patrons/Subscribers (two interviews)

Additionally, individual Interviews were conducted with:

- Marc Uys, PSO Executive Director
- Rossen Milanov, PSO Music Director
- Nell Flanders, PSO Assistant Conductor

Given the internal focus of the stakeholder interview process, the consultant rarely includes external constituents in the interview process. A select group of PSO patrons and subscribers



were interviewed at the request of the PSO. Every stakeholder who was interviewed was interviewed only once/attended only one interview.

It is important to note that all participants self-selected into the stakeholder conversations. As such, the stakeholder interview report is not meant to serve as a quantitative or comprehensive survey. Rather, the act of opening an invitation to all stakeholders with the option to participate was meant to do three things:

- Begin to welcome all internal stakeholders into the EDI conversation, empowering
 individuals from across the organization to begin to build ownership around the topic
 from their individual perspectives and lived experiences
- Identify a baseline of participation/interest from which to gauge a future increase in participation/interest as EDI efforts continue at the PSO
- Begin to gather input on a qualitative basis from within the organization

Stakeholder interviews focused on the following lines of inquiry as related to EDI:

- What do the words "equity, diversity and inclusion" mean to the PSO?
- In regard to EDI at the PSO:
 - O What is working well?
 - What would you like to see, moving forward?

Given the unique nature and natural flow of each conversation, the questions were weighted differently with each group.

Within the following summary document, answers to the key questions from the interview process are illustrated directly via the words of the stakeholder interviewees with the desire of representing the real experiences and ideas of the internal PSO family as directly as possible. Interviewees were assured that their contributions would be included in this report on an anonymous basis. As such, quotes that would identify their speaker by content have been altered or cut to allow for anonymity. In some cases, the stakeholder group of the interviewee has been included to provide clarity or essential role perspective to their quote. To clearly delineate external observation/opinion from that of internal stakeholders (who contributed the majority of quotes in this report), the consultant has noted in the report when stakeholder quotes are attributed to these external stakeholders.

NOTE: information conveyed in the "stakeholder quotes" sections of the report represents personal perspectives and beliefs and could display factual errors. Conflicting information shared during the interviews and included in this report should serve to inform the PSO of areas of internal disagreement and/or misunderstanding. Quotes represent the perspectives of a sampling of self-selected stakeholders at one moment in time. They are not meant to represent the "whole" of experiences or opinions as connected to the PSO. Rather, they are offered in this report as pieces of the larger puzzle of the PSO's ongoing EDI work. They should be considered within the larger context of the PSO's efforts.



PSO Mission:

The PSO's mission is to create opportunities for people in the greater Princeton area to experience excellent, innovative live music in many forms and venues, enhancing their appreciation for music and encouraging them to engage in the art form.

"There are sincere intentions (around EDI) at the PSO...a lot of the way that EDI has been looked at has been outreach rather than leaning in and listening and trying to figure out what it is that we don't know. We don't know what it is we want to know."

-PSO Internal Stakeholder

"Musicians are trained to assimilate. We need to take a stand in order for things to change. What kind of political stand are we going to take? The PSO needs to determine this."

-PSO Musician

"The thing we need to think about in the long-term is how to make the orchestra more inclusive so that we attract people of diverse backgrounds and so that they wish to come back."

-PSO Internal Stakeholder

"When you start with inclusion and work toward equity, you will get the diversity everyone is looking for."

-PSO Internal Stakeholder

"I believe EDI is important work for an organization, professionally. It is a process. An evolution"
-PSO Patron

"I haven't heard formal discussion of this topic at the PSO. I'm really happy to be involved in this conversation. It is important to me and I was happy when I got the call that this was a process that started before this summer. My thinking about this is not linear, either. I've lived in the county I have lived in my entire life. We live in a "Princeton bubble"; this is not the real world. It hasn't changed a whole lot. We are more diverse than we were thirty years ago but we live in a very affluent area that is 15 minutes from people who don't live in the world we live in. It is so important that we reach out and make connections. Music in general is something that can make connections among people. To the extent that the PSO is involved in it, I'm there and I'm very supportive of it! I applaud that we are trying to move forward."

-PSO Patron



Recommended Areas of Focus Based on PSO Stakeholder Interview Themes



Build Shared Understanding of Key EDI Concepts

Stakeholder interviews revealed a common challenge: the need to establish clear shared understanding of EDI concepts, terminology/language and the PSO's own vision for EDI work. Due to the timing of interviews being so early in the PSO's exploration of EDI, "equity, diversity and inclusion" were not yet defined by and for the organization. As such, the consultant heard many ideas about their potential meaning based on the personal and professional experiences of interviewees. Stakeholder understanding of and engagement with EDI as a topic varied widely. A number of interviewees strictly defined EDI work around the concept of demographic change. Others expressed a broader understanding of the subtleties inherent in diversity, inclusion and equity and their relationship to each other. The challenge of holding EDI as an organizational priority in the midst of other needs was also articulated.

Notably, a number of stakeholders within the PSO were able to describe inclusion in detail and on personal terms. Interest in inclusion and in ensuring that the PSO as an inclusive organization was evident. A number of interviewees described the correlation between specific elements such as physical space, tradition in the orchestral field and resulting success/failure in building inclusion. The presence of inherent interest in inclusion offers the PSO an opportunity to grow a shared understanding of what EDI work represents and how it benefits the organization. It also offers the opportunity to clearly establish EDI as a long-term investment and priority for the organization. Both are necessary in order to build and sustain the work as central to the PSO.

"Appendix A" of this document represents the PSO's draft EDI language as of January, 2021. Interviews took place before the process of this document was completed. Agreement around shared EDI language and use of this shared document as a compass in decision-making will be a key need for the PSO as the organization moves forward in its EDI work.

- "(We) have been thinking of EDI for a long time but with various degrees of intensity."
- "We all have different definitions (around EDI). It makes it confusing."
- "Everyone is on the side of the angels and well-meaning. We are preaching to the choir when we talk amongst ourselves."
- "It is challenging to make real progress. Given the everyday work of the PSO, at times, focus can shift to other matters."
- "EDI is not always a priority in the day-to-day workings of the PSO. The audience is not particularly diverse."
- "It seems that constantly, we have addressed EDI by 'numbers.' How do we build a learning experience?"
- "We need to have procedures in place for all board and staff to be indoctrinated into policies – to help to perpetuate the culture."
- "I think the orchestra should change."
- "Princeton, is old, its homogeneous, very white."



- "We mainly see race (in EDI). I'm not sure that is a fair lens to put on the symphony as the only lens. We have female composers; we have outreach to different aspects to our community.
- "Diversity brings an energy and a way to move forward and not become fossilized."
- "We need diversity to survive."
- "We have to explore things that are different already just to survive."
- "We are in a position of strength; it is important to have a broad perspective."
- "EDI is not a question of moral responsibility or flavor of the social context. It is a competitive advantage....it adds value."
- "I see this (EDI) as being important for the very basic survival of the art form."
- "We need to think about EDI in the broadest and deepest sense."
- "(EDI work) feels like a panic in organizations- 'we need diversity'! I think that there is an intentional way we should go about (creating inclusion) to avoid tokenism. It could very easily go in that direction."
- "The word coming to mind is tokenism. I've been working for symphonies since 1990 and this is not new. It feels like tokenism. There are never enough resources. It is hard to take the long view to invest in something you don't see results in for ten years."
- "As we diversify ourselves, we can do all these things, but the minute people sit next to
 each other and play/once they have entered, it is a different issue as to how each person
 feels."
- "How can we make people feel that they are included?"
- "All sorts of other types of discrimination. I am gay and I have a partner. Most of the time, I am accepted. But I have been made aware of cases where people do not want to (engage with us)."
- "I would like to be sure that the world we are building together is a world that feels safe to come and join- the way you go to a museum or a place of worship."
- "The Task Force has really helped me to see that EDI is not just about color on stage, but about perspectives brought to the organization. (The story of) going to a particular house for a reception and a person who was African American was not comfortable going in because it was owned by a slaveowner- the history of the place."
- "Our website needs to have information, links to panel discussions, etc. We need to get
 the Board educated, to build accessibility for people who don't look like us...we need to
 send signals that we are inclusive."
- "The whole venue and experience needs to be expanded and more accessible-- a lot of people can be put off by formality. Behavior and mannerisms can be off-putting. Put it into a more equal and inclusive environment." -PSO Patron
- "I understand that music is a niche market; it is not something everyone is interested in. If there is someone who is interested in it, we need to be sure that they feel comfortable in it and stepping into the concert hall. There are so many layers to that."

 Consistently name EDI as a strategic priority in a public way (on website, in strategic plan, where ever possible) and in forums directly connected to PSO Board, Staff and



- Musician leadership (Orchestra Committee meetings, Board meetings, Staff meetings)
- Distribute and discuss the PSO's EDI Language Document as much as possible as it is completed in its current form; use the document to inspire internal and external conversation about the nuances of this work
- Modify external-facing documents (brochures, website, etc.) to consistently share the PSO's EDI vision

Acknowledge Fears, Reframe EDI as a Value-Added, Provide Ongoing Learning Opportunities

Interviewees at the PSO were often transparent regarding their concerns and misgivings about EDI work. Fears of: not knowing what they didn't know, resource expenditure, uncertainty about how change would/could affect the traditional Eurocentric canon, losing people (especially patrons and donors) along the way, and loss of artistic quality were all expressed. Fundamentally, a number of interviewees expressed concerns around loss and change as associated with EDI.

At the same time, many stakeholders expressed a simultaneous desire to learn. Interviewees were able to name specific pieces of education around EDI that they needed and wanted, including appropriation, the history of the orchestra field as connected to EDI, and antiracism in the context of the history of the United States.

It is not always the norm to hear stakeholders speak so openly about fear and learning as connected to EDI work and it offers the PSO an advanced place from which to address fears, reframe EDI work as value-added on all levels, and build spaces for learning that are customized to the needs of internal stakeholders. PSO leadership at all levels is self-aware to the point of being able to speak their fears and request guidance and support. A number of stakeholders were able to place themselves quite personally within the work of EDI, connecting their own lived experiences to the need to build inclusion and equity at the PSO. This combination of awareness, leadership and curiosity places the PSO in an ideal place for learning and growth.

Stakeholder Quotes:

FEARS:

- "I'm terrified of this. I don't know what this is and I don't think any of us do. But the fact that there is so much buy-in is very hopeful."
- "(I have a) desire to protect what we have because it is good."
- "One of the hardest decisions you will have to get is how you will deal with musical quality. I expect the highest musical quality" -PSO Patron
- "The challenge will be not to reduce the quality of what is on stage through the goal of representation."
- "We are classical music. Unless we want to change who, we are and what we do, this is
 pushing a rock up a hill. (Classical music) hasn't been an area that many people can
 afford or many people have been exposed to."



- "(There is a) fear of stripping the pride in what we already do; of losing the enthusiasm. We need to expand the view of what this (EDI) is-- something to be more proud of."
- "I think people of my color and gender have to feel a bit afraid of what this means for our futures....is this work going to make us less relevant for the industry?"
- "Right now, there are giant risks in audiences and fundraising. Even though I can see the
 future being better, it worries me how we get there. The pandemic has already
 decimated our audiences."
- "I worry about the fact that we have a small staff; it is difficult to address diversity on the staff...when there is a change there is a spotlight on it."
- "Any time there is any move to change systems, individuals become statistics. Although we may move the field forward-- in 50 years we might move forward-- it doesn't mean that each individual has moved ahead and benefitted. There will be casualties of this work- composers, musicians, administrative staff- and I worry that we do everything we can to consider these things and avoid these causalities."

LEARNING

- "There are lots of contradictions in the literature. I would like to understand more."
- "I would like to have a little help in answering questions."
- "I wish to learn more about the ways where we might be inadvertently discriminating and exclusive."
- "I would like to learn more about the history of the field and racism."
- "I realized how unqualified I feel to address issues of appropriation vs celebration."
- "I want to stay on top of language and how we present ourselves."
- "I want to go into this work because I believe in it."
- "(What do I want to learn?) Nothing. I feel like I know all I need to know. I know what we need to do."

Strategies for Consideration:

- With help from the consultant, clearly identify and name the "parts of the fear" around EDI work at the PSO; work as a team at the Task Force level to discuss and answer questions about each piece so that the Task Force is prepared to have conversations with others inside and outside of the organization who express concerns or questions about what the work is about
- Reframe EDI work as a value-added in the formal language and vision document for the PSO
- Capitalize on interest in EDI via immediate and ongoing shared learning and development opportunities across the PSO
 - Create a "wish list" curriculum of EDI topics and presenters with the consultant and EDI Task Force
- Build opportunities for mentorship around EDI at the leadership level; match PSO leadership with willing local or national EDI practice leaders for regular conversation and coaching



- Build opportunity for PSO leadership to meet on a regular basis to specifically discuss
 EDI (ideally with an external facilitator)
- Build an ongoing path and associated annual budget for internal stakeholder learning spanning a range of EDI topics

Expand Awareness of EDI Outcomes and Impact Points

Stakeholder interviews revealed that building demographic change in PSO audiences is the predominantly perceived goal of PSO EDI work. Many stakeholders framed EDI work as "us and them," speaking of the audience as "other"- a demographic representation that can be controlled and that should mirror the demographics of the Princeton area. Interviews revealed a tendency to assume a correlation between programming by BIPOC (Black, Indigenous and People of Color) composers or featuring BIPOC artists with changes in audience demographics.

A focus on audience demographics as the primary outcome of EDI work can block deeper engagement with communities and BIPOC. It places the PSO at the center of relationships with the community vs. centering community and audience members. The question of "why won't they attend?" represents a layer of expectation, control and power between the PSO and the community, as well as an example of othering vs. belonging. Finally, it can represent deflection away from doing the hard internal work required to truly build lasting change around EDI.

Sustained change in audience demographics, while certainly an indicator of work around EDI, takes years of hard work to build. The PSO family must be primed with this expectation. Discussion needs to take place about the many other pieces of PSO work and culture that must be adjusted in order to build a true culture of inclusion and equity that will attract and retain audience members of many lived experiences. Moving the PSO's target for EDI work away from a focus on demographic change and toward building reciprocal vs. transactional relationships with the community, all the while more deeply understanding EDI and making change across the organization, will prepare the organization for the type of change that will lead to meaningful and lasting results.

- "I think more about change in the audience and less at the board level."
- "The purpose (of EDI work) is that we want to have a diverse audience, so we need diverse content, so we need people of color on the stage."
- "From a marketing perspective- we NEED young people, people with children, people in our own community to come up and take those seats because there are older people in them, now."
- "I notice some diversification of the audience, It happens when there is a program of particular interest to a community that isn't regularly there." -PSO Patron
- "1/3 of our musicians are Asian; our Princeton school district is Asian. The audience does not reflect our demographic."



- "In one of the concerts last year or the year before there was a Flamenco dancer from Argentina. It would have been wonderful to see more people from the Latin community there. Maybe if we advertise a Black composer more into (a Black) area, we might see more people." -PSO Patron
- "We'd all like to see our concert hall reflect the population we see walking around Princeton on a Saturday afternoon. I'm not saying that an exact representation is needed, but at the same time if you look at the photos of our concert hall, it is predominately white and older people. It would be great to have a feeling of more diversity in the audience."
- "What are ways we can reach other groups? Soundtracks? Take programs to libraries, etc.? Give free tickets away?"
- "Given that the orchestra has a higher Asian representation, why hasn't the audience followed? What would be the next ways that we could try to get the next audience?"
- "The PSO has recently doubled the number of subscription concerts in recent years. We do six programs performed twice each. This is exciting, but the project also has a finite timeline on it if it is not making financial sense. There is a push to increase ticket buyers. And if it doesn't work, the numbers of concerts will go down."
- "I love the outreach to the younger children, but as you look to the audience, you are seeing people 'our age and older' and I notice on Saturday night there is a younger and more diverse group coming in."

- At every point possible, clearly refocus internal and external conversation around EDI to place onus on the PSO to create change (vs. placing an expectation of interest and attendance on the community)
- Engage in deeper learning at the EDI Task Force level about the various "levers" within the organization that need to be pulled in order for change to take place and the broad scope of outcomes/time table around them
- While working to represent a wide array of lived experiences in programming choices, also always consider all repertoire to be for all people. Be careful not to assume that programming BIPOC artists should or will lead to audience demographic changes. See patrons as complex individual human beings and the act of building audience change as a long-term outcome of deep, ongoing EDI work across the organization.

Broaden and Deepen Board Membership

The stakeholder interview process revealed an opportunity to reframe the attraction, experience and retention of PSO board members through the lens of EDI. Some board members who participated in stakeholder interviews expressed a strong level of pre-interview consideration and understanding of EDI while others were clearly new to the topic. A number of board members struggled to speak to why EDI is important to the PSO and some, per the fears cited earlier, named their concern around a "lessening of quality" as a result of EDI efforts. Similar to other stakeholders, board members often noted their focus on audience



demographics as the main indicator of success around EDI. When asked about how the PSO board could change for the better through EDI work, it was not uncommon for board interviewees to turn the conversation toward change onstage or in the audience. Even when expressing deep commitment to EDI, very few board members who were interviewed could speak to the need for internal change on the board.

At the same time, there was broad agreement that the diversification of the board from a demographic standpoint was important and necessary. Interviewees cited the need for the organization to improve its work around attraction and retention of BIPOC board members in a non-tokenistic way. Some noted that they felt the board didn't attempt to fully develop relationships with board members of color in the past, leading to attrition of those members. Building additional levels of engagement was often cited as critical to expanding board participation. Stakeholders noted that committees were important to begin to engage new individuals, but that committee membership must lead to longer-term engagement so that committee members did not feel used.

Some current board members were able to talk about board engagement and inclusion in an informed and personal way. In general, conversations about and with the board indicated the need for deeper EDI learning and regular engagement around EDI work. There is opportunity for the PSO board to deepen their understanding of EDI in a way that includes but goes beyond representation, toward inclusion and equity. Further work must be done to build full board ownership of EDI and their understanding value it brings to the PSO. This understanding and thoughtful accompanying attraction and retention models will better allow the PSO to offer an inclusive experience for new board members representing a wide array of identities and lived experiences.

- "On our Board, we don't have accurate representation of the greater Princeton Community."
- "Our Board is very unrepresentative. There are no BIPOC on the board."
- "I would love to see a board even that was more diverse in terms of the people there; this could mean a lot of things- socio-economically, class, etc."
- "A lot of people, particularly on our board, have a sense that this is something we can do and 'fix' and move forward as normal."
- "If, as a board, there is a collective acknowledgement that, as well as we are doing and as diverse and interesting the offerings we have are, there is a lot more we can do. Those changes can be best informed by people who look different than us. If we have that attitude, it will feel like a better environment to welcome new trustees of color. From the moment they arrive, a Black board member will know they are Black. They need to know that they are there for more than that."
- "(It is important to) think about diversity in a different sort of way- what we want the board to look at- age, etc. It is important to think about the board in 10-15 years and having interested, qualified and excellent people."



- "(Board membership) is very competitive in many facets. Volunteers, audience members, board members, etc. There is such a range of ways to spend time and money and energy."
- "The Nominating Committee needs to start with aims of geography, age, different abilities, areas of expertise, etc. It's hard for any organization to realize this. You also have a budget to fill. The people who can contribute will often be ones who are highly active. This is a tough thing. (You need to) start from the top and set an example." -PSO Patron
- "We often digressed from the board conversation. We are a small organization with limited resources...through it all, how can we have a more diverse board?"
- "Putting someone on the board and waiting for them to step up and do something is the wrong thing. We have done a lot, not on purpose. We need to build relationships. It is such a key thing-- give them power and authority to bring into the midst their voice and exert it."
- "(We have had) two instances of African American people on the board. One...didn't show up, but I don't think anyone ever went to visit him and really pursue him. And we had a marvelous banker...we made some progress, but I don't think she ever felt that she was a part of our team. It will take a long time for those things to happen. Sustained efforts have never happened."
- "One of the most important things we have done as a board has been to build term limits. This has been a recently started practice. I think it's important to have new ideas coming on the board; to not get set in your ways."
- "I wish for a goal around diversity; a specific number. A group of people joining the board. There is safety in numbers. Coming on the board and representing a view point but being the only one...people need and want support that goes along with board membership-- training, mentoring, facetime with board and organizational leadership-so that they can feel empowered to feel what the organization is about."

BOARD ENGAGEMENT

- "People might be introduced to the orchestra via committee work to see what they like and can contribute."
- "There isn't any place to put people who want to be active with the PSO-- to do more or have a bigger connection. We don't have another vehicle for telling people we are glad we met them and want to be involved."
- "We do invite non-board members to join some committees; things that are more operational and don't involve huge policy debates."
- "I think it is important, just as I was welcomed as I attended the first board meeting, that we welcome everyone in their ideas. (When I joined the board) there were people coming over who didn't even know me and saying 'glad you are here.'"
- "I think it would be valuable for board vetting to be thorough and take into account personal stories and background a little more- certainly I feel this would enable other board members to assist, orient and acclimatize newbies...Because I was an outlier, not familiar with a corporate setting, and most of my board colleagues were habitual board



- servers, there were assumptions made of my familiarity and ease with actually being a board member, and what it entailed...I think going forward, it would be useful to tailor the welcoming of a new board member on their experience and needs."- Board Member
- "The times when I get to interact with the musicians make me feel most included." Board Member
- "The board should or could do something that could actually make a connection to a different community and connect it to an already existing event. Perhaps a board road trip without expectations?"

- Collect self-identified demographic data of current board members, also asking current board members to identify the unique skills and experience they offer the PSO
- Develop a board membership matrix outlining skill sets, demographics and professional experience of current membership. Use the matrix in the Nominating Committee to identify areas for growth and recruit specifically with multiple aspects of identity in mind. Clearly communicate the board search process from the search committee to the whole of the board on an annual basis.
- Build clear metrics for change in demographic representation in the short and long-term
- Provide implicit bias training opportunities for all current and incoming board members
- Examine current board structures for barriers to access for people of various lived experiences (i.e.: requiring in-person meeting attendance vs. offering virtual attendance)
- Focus on expansion of the board's circle; require board members to move beyond their current social circles (consider assignment to each board member to serve as an ambassador to an organization or neighborhood that the PSO is working to get to know)
- Host in-person board meetings at partner organization locations to introduce board members to new neighborhoods and community representatives
 - Create space at each board meeting for a presentation from the partner about their work and community
- Develop exit interview process for board members leaving the board
- Focus on development of relationships with/board recruitment of rising mid-level corporate leaders of color
- Expand ongoing board engagement with professional membership organizations for People of Color

Model Best Practices in Musician Selection within the PSO's Scope and Operations

The diversity of onstage demographic representation was a topic that was often brought up by stakeholders of all types- board, staff and musicians. PSO musicians who participated in stakeholder interviews generally supported the PSO's EDI work. They expressed interest in learning more and conveyed their support of their peers in the orchestra. Interviewees expressed the artistic value-added of EDI. Simultaneously, the same type of fear that was described as existing in other stakeholder group was observed during musician interviews.



Specifically, musicians expressed their confusion around the current substitute musician attraction and retention process at the PSO.

A wide (and sometimes conflicting) range of information and opinions about the substitute process was expressed by participating stakeholders. Concerns of ageism were expressed and interviewees described the challenge and trap of familiarity bias- the reflexive habit of returning to the people and places we know to recruit and hire. Some interviewees noted that they wondered about the PSO's process in not only advertising an open position and attracting a sub, but also in retaining that sub. The challenge of PSO musician recruitment was also articulated. Stakeholders noted the barriers in finding and retaining subs in a city that is challenging to commute to, a highly saturated market near New York City and at a smaller budget orchestra. The consultant has included an array of stakeholder opinions in the stakeholder quotes for organizational reference.

The PSO has an opportunity to hear and respond to questions and concerns about musician recruitment and retention by increasing transparency around process. Musicians (and other internal stakeholders) are ready to become partners and supporters in the PSO's efforts to build and maintain a substitute musician invitation and audition process that 1) is reflective of best practices in EDI and 2) is clearly documented and communicated. By responding proactively to concerns with an invitation to create a process that further articulates intentionality of process in regard to EDI, the PSO can channel the desire of the musicians to learn and to be a part of best practices in recruitment of musicians from a wide range of backgrounds.

<u>Stakeholder Quotes:</u>

- "I've benefitted enormously by being to collaborate with musicians of all backgrounds....it has shaped me as a person and as a musician."
- "I have talked with so many colleagues and I get the feeling that we as musicians are biased in the opposite direction- a positive that we have this going for us as a class of people."
- "I'm interested in not short-term solutions, but how can we actually facilitate forging opportunities for people who have talent potential and interest but not the support to succeed in this field, musically, 5-10 years from now?"
- "There is an issue of how to attract applicants to an orchestra like this. It is a difficult, long term process that requires fundamental change in repertoire, etc. Decentralizing whiteness is a difficult thing."
- "We need to get people of color on stage."
- "It is imperative that we lay the groundwork that lives on for 50-100 years."
- "For most of us, this isn't our only EDI discussion since we play in multiple orchestras. We seem to be talking to ourselves, but we'd like to have the people we'd like to include."
- "We are all insecure about our careers- especially in this time of COVID!"
- "There are ties to the audition question-- what does success look like? What do we need to do to achieve what we are talking about?"



SUBS

- "The barrier that is even more complicated than getting people on the (sub) list is getting them to feel that they are a part of the orchestra."
- "We have decent gender parity (in the orchestra) but not much more diversity than that, potentially due to sub lists."
- "A problem is access to the orchestra; it is not easy getting to Princeton. If you are a New York-based musician, Princeton might not be your scene. The priority has been getting the best musicians that are available. It limits the scope in some ways."
- "Are there other sources of talent that we can turn to when we need subs?"
- "I hear many people talking about the demographics of the orchestra. Michael reached out to me as manager of the Princeton Symphony to ask if there were any musicians available. He's having a tough time just putting bodies in seats. He's scrambling to find people. It would perhaps be more helpful if we had a more open process. (We could) ask principals, ask people who have been in the orchestra for years- who do you know who you'd want to work with?'"
- "Our sub pool could be built a la the Philly Orchestra. When they do sub auditions, the last round is chamber music for strong players. Everyone is seen (no screen) and it gets the best players."
- "We used to have a system on place when you could be a regular sub and become an orchestra member. Could we go back to this as a possibility?"
- "How do we advertise (positions) and how do we get the news out?"
- "Perhaps a part of this is might be why we aren't reaching a group of musicians...if someone can't get a foot in the door, it's tough to get the call."
- "I have recommended fine players of color who have not been called."
- "It would be great if we had more transparency in the orchestra, across the board."
- "I wonder how decisions are being made."
- "I would love to see the PSO open up a little more to input from the players."
- "Not knowing why you aren't asked back is not good for anyone."
- "If there is any kind of bias that I feel in the orchestra, it is ageism."
- "There can be ageism and elitism about what schools we come from, etc."
- "I have observed that people who used to be on our list are not called anymore; younger students are being hired/playing. I'm afraid that there isn't a way this isn't determined."
- "(We experience) a specific type of ageism. There is a pool that a lot of subs come from, Symphony in C, which is a training orchestra. Members are young, fabulous players. The pool is a youth-oriented organization...It seems like in recent years, when there is a need for a sub, more often than not it's someone new. We don't get the same folks back. I'm not sure if they are vetting players, etc."
- "We have dual personnel managers- one for hiring and one for logistics."
- "Our current personnel manager has been making efforts to call African American subs."

Strategies for Consideration:

 Provide annual implicit bias training for current and incoming ISO personnel managers, musicians and conductors



- Collect self-reported demographics of current PSO members to build an accurate understanding of current demographic makeup in the orchestra
- Assess demographic data to fully understand where holes in representation and experience exist; build clear and transparent goals as metrics for change over a period of 1-3 and 3-5 years at the PSO
- Build a working group of PSO leadership, personnel managers and musicians to articulate goals for recruitment and retention through best practices in EDI, then building out and sharing that process with the organization for initial feedback and ratification
- Post orchestra jobs beyond the International Musician, partnering with organizations such as Sphinx, the Chicago Sinfonietta and the Gateways Music Festival to share word beyond "usual" outlets; assume interest- post through the broadest possible set of channels
- Diversify audition repertoire list to include music written by BIPOC composers
- Form a deeper connection with the Sphinx Organization; invest in sending musician leadership to the annual SOPA (Sphinx Orchestral Partner Auditions) auditions to expose ISO musicians to a range of pre-professional musicians of color currently seeking orchestral musicians
- Cross-check, confirm and share statistics about musician recruitment and retention to avoid speculation and incorrect information
- Build a space for transparent posting about personnel needs and decisions; further engage members of the PSO as partners in sharing word of openings

Expand Upon Best Practices in Representative Programming

Stakeholders of all types noted their interest in the PSO further expanding its repertoire to represent an array of lived stories and experiences. They noted that this expansion builds their engagement with the wide possibilities of the orchestral art form. A number of interviewees noted that they believe the PSO's current repertoire is quite traditional, offering repertoire generally written by white composers. At the same time, they recognized and appreciated instances of the PSO offering works of composers from a broader variety of lived experiences. Interviewees often expressed willingness to try new music (as audience members) and articulated the value of being connected to pieces that might be new to them. Specifically, stakeholders spoke of Rossen Milanov's (PSO Music Director) leadership in building programs that offered programming they might not have been familiar with in the past. Stakeholders also spoke of Derek Bermel's work in creating and offering to the PSO new works that explored often underrepresented experiences.

Stakeholders expressed interest in further growing onstage programmatic representation and the manner and locations in which the PSO presents concerts. Pops, family and outdoor concerts were all named as pre-pandemic concert formats that attracted a broad scope of audience members. Stakeholder expressed a belief that there needed to be more opportunities to bring people into the PSO beyond the current subscription season.



The PSO has the opportunity, given its size and scope, to further advance broad representation within programming and guest artists by setting goals for the short and long-term. Given its size and the care that its leadership has expressed around EDI work and the commitment of its artistic team, the organization can help to lead its audience and the field in onstage representation via the programming of works by BIPOC composers and presentation of BIPOC artists. This can and should be done, with simple initial work, in a way that clearly takes stock of current offerings and includes metrics to measure growth of representation over time.

Stakeholder Quotes:

- "In terms of programming, we have a couple of great examples brought to us by Derek.
 Over the last 10 years, there were two pieces that we premiered with Derek. The
 Migration Series Project was a town wide effort celebrating the emancipation proclamation."
- "Through the work of Rossen, I have seen a concerted effort over the last five years to diversify programming. There have been programming elements that are not in the canon. To me, this is exciting and colorful. There must have been conversations...among Rossen, orchestra members, etc. There is clearly a consciousness about it. I commend his efforts to bring that consciousness." -PSO Patron
- "In terms of diversity, I have been impressed with the overt effort to include African American composers in concerts offered this fall. (There have been) people I have not known on programs," -PSO Patron
- "I go as my date night- to be entertained. I want a pleasant evening. There are times I go and don't know what is being played." -PSO Patron
- "I appreciate the mix of music that is chosen. New, Avant Garde music and composers, and at the same time including the old favorites that all of us enjoy."
- "The interviews that were done with the virtual concerts of composers and soloists added appreciation to what we were getting, including from the diversity perspective. They were new people we didn't know." -PSO Patron
- "(I loved) the Migration Series, Jacob Lawrence paintings, the Derek Bermel commission, Lincoln Center Jazz." -PSO Patron
- "I would like an internal study on repertoire choices- programming and commissions, soloists, guest conductors, etc. I would like for it to include all of our activities. Some of our activities have a much greater impact on communities of color: outreach concerts, and pops concerts, etc. I'd like to be more aware and to see if there has been a trend in one direction or another. Is it maintaining or going one way? (Otherwise), it can easily become tokenized."
- "One of my pet peeves has always been Black History month. Why are we playing music by Black composers only one time a year? I would like to see this practice end."

Concert Format and Location:

 "We are seeing with the addition of our Saturday evening concert more families, younger people (in the audience). It is still not diverse in terms of race."



- Saturday night subscribers tend to be a fairly broad make up of people, particularly the 'upper deck'." -PSO Patron
- "We are trying to be in touch with more ticket pricing that allows middle class and lower class (people) to afford a ticket."
- "Historically, the concert has tried family concerts and have failed. What if we reexamined this with a new lens?"
- "We often bring foreign exchange students to the PSO. For many, it's the first time they have been in a concert hall, let alone have heard orchestral music. Pops concerts are one way to get new audience members...music that is more accessible and less scary." -PSO Patron
- "For many years, the NJSO gave a free outdoor concert on July 4. Perhaps outdoor concerts at a larger venue could be helpful." -PSO Patron
- "The outdoor concerts were wonderful this summer." -PSO Patron
- "The Pops series was three concerts at a separate theater. Going to a different theater meant a more accessible culture and a different audience Clapping after songs, programming- there were greater options. We were feeling optimistic about a way to connect with new people. Was an experiment that was going to continue."
- "The biggest struggle as an organization is going to be the stereotypes of what a classical orchestra is. Being in Richardson...it's a gorgeous hall but makes you feel like you should not show up in jeans. Having a person next to you shush you because you want to clap. (What) if some of those stereotypes were gone?"
- "What worked well is BEATS...everyone in the room enjoyed it. 'We bring and you bringour house their house.'"

Repertoire:

- "(We) start this work immediately recognizing that it won't change overnight...everyone (other orchestras) has a very PC season planned, but it doesn't feel genuine.

 Representation is not the whole solution but it is a part of it."
- "PSO programming tends to be quite conservative. Classical, pops, education (connected
 to classical series). We were scheduled to perform two works by contemporary woman
 composers this year. Last season, we commissioned a work by a Middle Eastern
 composer and featured a Middle Eastern soloist. The broadening of classical cultural
 language was important. (It) led to interesting conversations"
- "The preferences of traditional audience take precedent (at the PSO). The audience is very strongly white"
- "I (was involved with the) holiday concert last December. One of the traditional collaborations was with the New Jersey Tap Ensemble. (It was) so dynamic and fun and exciting; the audience went crazy. The process of working together was great. We had really positive interactions. It felt great and like a breath of fresh air. It was an example for me of a real collaboration with an organization coming from a different place than us."
- "I'm interested in different styles of music and would love to explore collaborating with a Latin band, etc. I would love this It brings me so much, artistically."



- "(The PSO has) a new partnership with Youth Orchestra of Central New Jersey. Their racial demographic is less than 50% white. I'm very excited about this as an opportunity to have sustained contact with the broader community. It's an area for work; there is so much with encouraging and supporting growth in this area and a lot of room for inclusion. I'd like to have conversations with students about how to make it more inclusive."
- "I see that the PSO is reaching out in the community"- PSO Patron

- Collect and consider Princeton area community demographics to build full awareness of local cultural assets
- Take stock of current programming and document current representation on a
 demographic level; with the artistic team at the helm, set a goal for additional
 representation (and name the type of representation that is lacking) in the short and
 long-term, whether by season or as a through-line across seasons; build metrics for
 measurement of success
- Continue to integrate music written by underrepresented composers with established pieces on concert programs (vs. programming underrepresented voices or artists in a "one-off" or "stand alone" way)
- Partner with artist managers to identify early career soloists and other performers from underrepresented backgrounds
- Begin the PSO's relationship with Youth Orchestra of Central New Jersey by sharing with each other each organization's commitment to and goals around EDI, building clarity of shared mission and compatibility in moving toward shared goals
- Engage in additional organizational discussion about long-term vs short-term investment; building additional financial access to Pops concerts (for example) could mean taking a short-term earned revenue loss in exchange for investment in a longterm audience building strategy that could be attractive to a greater number of contributed revenue sources (especially corporate and foundation funders)

Examine and Reframe the PSO's Relationship with Trenton

The PSO's relationship with Trenton was cited by a range of stakeholders during interviews. Some stakeholders spoke of their pride and approval of the PSO's work in Trenton. Others expressed misgivings about the nature of the relationship and of their belief that the way the PSO engaged with Trenton needed to be examined and changed. Interestingly, depending on the stakeholder, the PSO's relationship was either viewed as a great point of pride for the organization or one of extreme concern.

The consultant observed that Trenton appears to have become shorthand for the PSO's view of "diversity." Rather than speak of Trenton as a complex community of individuals representing a variety of identities, stakeholders tended to use Trenton as an example of racial diversity with little discussion of relational connection. Stakeholders spoke of Trenton at a surface level,



offering it as an example of EDI work rather than speaking of it with nuance. In many cases, the relationship presented as being one of "at" versus "with," or in EDI terms, "othering" versus "belonging."

There is risk- if not damage already incurred- of the PSO causing harm in the community and with its relationship with the Trenton area if this manner of characterization continues to occur. The PSO must work to develop a relationship with Trenton that is focused on understanding and communicating the unique assets of the area as residents hold them dear. In a healthy situation, multiple PSO stakeholders will regularly take time to sit among Trenton residents to hear and understand the community's needs and strengths. The PSO can then effectively use its power and position to center and lift the artistic assets of Trenton and to act upon their needs as described.

The mantra of "nothing for us, without us" should help to guide all program and relationship choices with Trenton and other communities; most especially, Communities of Color. Doing anything less tokenizes the relationship and risks placing the PSO in a role of white saviorism. It could be easy for the organization to fall into a pattern of philanthropic support that harms more than helps because it focused on how and when the PSO wishes to engage with Trenton vs. how Trenton wishes to engage with the PSO. A truly reciprocal, ongoing relationship must be established that places the voices, experiences and options of Trenton residents at the highest level of priority and decision-making for the PSO. Additionally, human and financial resources must be dedicated to the education and community engagement/BRAVO team and musicians who are working to create and sustain this relationship. Anything less could be more harmful than not engaging at all.

- "Marc's effort to do outreach is a positive thing- in Trenton, etc."
- "We are doing a good job of giving concerts in schools. We have gone to Trenton"
- "I commend the symphony for doing programs in the schools. A way to make it more inclusive is to educate people at a very young age. (We have the local) benefit of Trenton Children's choir. The PSO has begun to understand that as a country, we will look very different in the next 50 years." -PSO Patron
- "I would like to see a bigger conversation about the board, maybe in Trenton?"
- "It might be worth revisiting how we talk about Trenton in terms of fundraising. Bravo education programs put Trenton at the forefront. They are attractive for people to give to. Using that group of people raises funds. It is not as attractive for people to raise money to bring music programs to Princeton and Montgomery."
- "If people from Trenton come over (to Princeton and the PSO) and pay less- does that decrease the value?"
- "We need to go the extra step. Instead of inviting kids to come to one or two concerts or hear from us once with no follow-up, it would help to have people who looked like them in the organization. I didn't grow up dealing with racism but I think this about follow-up-lessons, money there to support students, etc."



- "We have to start at the basic end of the education system to be sure that kids have access, that they have lessons, etc. Some charter schools have no strings in schools. Trenton schools have excellent music programs."
- "I wish that we had more of a presence in the other communities. The Trenton Music Makers program that the PSO is involved in is an obvious place for partnership opportunity. (My) sense is that there isn't a focus on starting in communities where the interest might already be built in."
- "The ways that we use the word 'Trenton' in this organization- ick. Trenton has a racial connotation. (We are told that it's) not the 'right kind' of diversity in Princeton and Montgomery"
- "(We need to) start with Trenton's needs and build from there. (I have) concern around the idea of wanting to expand for expansion's sake vs. an equal relationship."
- "One of the reasons I really wanted to reach out to Trenton is to build a basis of equity and understand and celebrate everyone."
- "I would like to have more conversations with the people we are hoping to include, locally. To talk with a music director in Trenton, etc."
- "BRAVO is mostly a small ensemble school visit program. We visit a lot of schools right now, but ones primarily closer to Princeton. There has been a push to go to Trenton. Adding it (as a BRAVO location) is a really big chunk. Having a full orchestra concert there has been tried and the board wasn't happy with the results. I have a lot of concern about dropping into a community without understanding their wants and needs. (After the) Trenton middle school performance, the board was not happy with level of attention students paid during concert- their talking. The level of unhappiness was really high. Expectations were unrealistic.

- As an element of building long-term, reciprocal relationships with communities (including Trenton), ask external partners to hold the PSO accountable for specific culture change, goals, and EDI metrics
- Educate internal teams deeply regarding the need to engage with and speak about the community using asset-based (vs. deficit-based) language/an asset-based approach
- Center the voices and experiences of Trenton area residents in all planning and decision-making work; engage them as co-creators vs. recipients
- Hold the "nothing for us, without us" mantra throughout PSO fundraising and programmatic decision and execution models
- Shift power in the evaluating the success and efficacy of programs such as BRAVO to the residents of Trenton (vs. PSO stakeholders)
- Commit to being sure that PSO board, staff and musicians are as frequently present in Trenton at community events as Trenton residents/students are at PSO events
- Practice speaking with nuance about residents of Trenton instead of speaking about the city as a "EDI example," hold each other accountable for this practice and chance within the PSO



- Work deeply to invite and meaningfully engage Trenton stakeholders in other aspects of the PSO's operations, such as board membership, being aware of returning value to the individual and the community on behalf of the PSO
- Expand and deepen organizational learning, especially at the board and orchestra level, regarding traits of white saviorism; build internal accountability in examining projects before they are chosen for evidence of white savior models and commit to changing the project before it begins or to saying "no," completely; use the PSO EDI Task Force to vet questions and concerns around projects that could lean in this direction

Commit to Systemic Change

Of note in the interview process was the ability of staff, in particular, to name the systemic challenges of tradition, power and advantage that are often inherent in orchestra environments. As an example, staff members articulated their appreciation and respect for current donors. At the same time, they called into question the traditional practice of rewarding privilege through donor benefits and events, a practice that is not unique to the PSO. They recognized that the systems and norms of current fundraising tend to build power among a few rather than supporting the equalization of power among many. The concert experience and who it is truly for was named as a question in examining power and equity at the PSO. Finally, staff members craved clear guidance as to the position of the PSO in the context of national discussion. How should they represent the PSO's vision for EDI as major current events unfold?

With support from the organization, staff members at the PSO have a unique ability to share their observations and experiences around power and advantage to continue to guide the PSO toward more inclusive practices. This type of sharing can feel highly vulnerable to staff members. Especially when they personally represent marginalized identities or those of others, staff members can feel risk in sharing their opinions in spaces with others who hold more inherent organizational power (such as board members and musicians).

Environments in which all internal stakeholders at the PSO can feel free and open to share their experiences must be cultivated with help from an external facilitator. Over time, trust must be built to demonstrate that there will not be retribution for sharing such experiences. The staff holds vision around what the orchestra could look like if it were to reimagine itself to truly focus on broader participation and model the distribution of power and advantage. This is a unique gift that can and should be explored. If it is not, the PSO risks losing key team members.

- "Fundraising is about wealth. I would love to see us more to a model that is not fundraising only with the most wealthy."
- "We are a nonprofit, but we are a business model- how do we balance the two?"



- "We are so successful because we are really focused and high quality but that and in itself is a model that is exclusive. It limits us."
- "How do you price things so that people who already come and associate a price tag with value so that they don't think we are a community orchestra?"
- "Where is the line between outreach and marketing for tickets?"
- "What we consider to be our core group of patrons are big time influencers. If they are not happy...they have more power and influence over use than we would like to admit."
- "A lot of our patrons have openly said that they crave exclusivity and like special experiences. It's a tricky balancing act. How do you give them unique experiences that they crave without coming across as an exclusive organization. We have to fundraise, but it creates an exclusive culture."
- "I would love to see us in town more, musically. I want to have a 5K fundraiser-something that isn't an elite party, but something that would bring people who would never come to a concert but would be involved to engage with others. It would reach everyone regardless of whether they come into the concert hall."
- "Fundraising is successful based on who is in the room...the 'right people'."
- "I would like to see us find others ways to fundraise with and for other groups. The first step is not having events for a certain group of people. The way that we offer incentives and rewards for being a part of a select group-subscriber and donor- is to offer a reception when you can meet Rossen and the guest artist. if you aren't a part of that group, do you get to do it? I understand why we do it, but the question needs to be asked: is it equitable?"
- "There is definitely an inner group- party boards. 'Why is this person here?' is asked when someone new is there."
- "(With) BLM and death of John Lewis...would be helpful to agree as an organization-position statements? Is it right that we respond? I need to know when I can react (on behalf of the organization)."

- Use an external facilitator to guide cross-functional conversations with board, musicians and staff
- Continue to encourage staff to speak their experience and to challenge norms openly, without fear of retribution
- Utilize progressive stacking in meetings; calling upon individuals with the least power in their identities and roles first
- Build a set of shared talking points for internal stakeholders about the PSO's view on current events, rooted in the PSO's developing EDI language/vision

