

**THE ORCHESTRA LEADERSHIP ACADEMY: A PROFESSIONAL
DEVELOPMENT PROGRAM OF THE AMERICAN
SYMPHONY ORCHESTRA LEAGUE**

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Introduction

The Orchestra Leadership Academy (OLA) is a national, broad-scale professional learning program designed and administered by the American Symphony Orchestra League. This paper discusses OLA from the perspective of ongoing evaluations conducted since 2000. The major data focus is an extensive evaluation that occurred from 2001 through 2003. This evaluation, along with subsequent annual evaluations, has established OLA's value along two dimensions: 1) the quality of content and learning experiences; and 2) relevance and applicability to orchestras. The findings of this evaluation were crucial in laying a foundation for the continuation of OLA and in identifying ways in which OLA could enhance its effectiveness.

Having determined that OLA is consistently characterized by participants as including excellent content, outstanding instructors, and high levels of relevance to the learning needs of individuals working in local orchestras, program development and evaluations since 2003 have moved increasingly toward issues of institutional impact. OLA participants identify goals relating to their professional roles or to the orchestra at-large at the completion of their seminars. Several months later, they are interviewed relative to progress that has been made and factors that have influenced the achievement of their goals. In addition, two targeted programs have been developed to focus

intensively on specific aspects of orchestra management. These include the Institutional Vision Program and on-line mentoring circles for incoming chairs of trustee boards.

Context of OLA and Evaluation Studies

As the national service and leadership organization for American orchestras, the American Symphony Orchestra League is well-established in providing professional learning opportunities for musicians, conductors, managers, board members, volunteers, and staff members. Founded in 1942, the League serves nearly 1000 member orchestras representing the spectrum from major symphonies to volunteer community orchestras and chamber, youth, and collegiate orchestras. In addition to orchestras, membership includes individuals, various arts organizations, businesses that serve orchestra needs, libraries, and career centers.

Conferences, seminars, training programs, and task forces have contributed to the League's leadership in addressing orchestras' organizational, artistic, administrative, and financial concerns. In addition, the League works collaboratively with government, philanthropic, education, and arts organizations to confront the challenges associated with sustaining a dynamic role for orchestras in contemporary society and to develop arts policy initiatives.

In the late 1990s, a host of percolating concerns impelled the League toward an expanded and more systematic approach to professional development. A compelling need identified in the early phases of OLA was to enhance orchestras' leadership capacity through seminars designed to foster innovation, inclusive and collaborative management and decision-making, and stability within a context of core values.

From a curriculum and instruction perspective, this central focus of OLA was supported by considerations such as being sensitive to diverse orchestra profiles; balancing management skills with leadership qualities; addressing the range of professional roles within orchestra cultures; advancing mutual vision among trustees, managers, conductors, musicians, and volunteers; nurturing career development; maintaining artistic standards; and employing research-based principles of adult learning.

From an operational perspective, considerations for OLA included balancing excellence with affordability; identifying exemplary faculty from within and beyond the field; fostering a culture of systematic professional development among orchestras; sustaining an appropriate mix of conceptual, topic-based, and skill-based learning; attracting a corpus of participants; and managing logistics such as location and seminar length in view of participants' resources and schedules.

Out of these beginnings, OLA rapidly evolved into a comprehensive program of seminars designed to address a broad spectrum of professional issues and needs. To cover the range of potential needs, seminars were organized under three large categories of programs: a) Leadership and Organizational Change; b) Strengthening Professional Skills; and c) Building Careers. Seminars dealing with leadership and organizational change were the most intensive. They were generally residential and ranged in length from a few days to two weeks. Seminars on strengthening professional skills focused on short-range and skills-based topics, and they lasted anywhere from a few hours to an entire day. Many of these seminars were convened in conjunction with the League's annual national conference. Those seminars designated in the Building Careers category were intended for aspiring or recently employed administrators. "Essentials of Orchestra

Management” is an annual, ten-day intensive career-building seminar that identifies talented emerging leaders and uses the expertise of faculty mentors who have been particularly successful as orchestra executives. An important dimension of this seminar is encouraging greater gender and racial diversity in orchestra management.

Cognizant of the importance of documenting and assessing OLA as part of its ongoing development, the League contracted with the Center for Educational Partnerships in Music, housed at Georgia State University, to conduct a two-year evaluation study for the period from October 1, 2001 through June 30, 2003. Annual follow-up evaluations have been completed in every subsequent year.

The 2001-2003 Evaluation Study

Overall Data

Data sources for the study included questionnaires completed by seminar participants, observations of seminars, site visits to orchestras that sent teams of individuals to OLA seminars, follow-up interviews with individuals who had participated in OLA seminars prior to 2001 (seminars began in 1999), and interviews with selected participants and faculty. Sixty participants, representing a cross-section of orchestra roles, and 7 faculty were interviewed. Tables 1 and 2 and Figure 1 in the Appendix indicate the number of seminars, completed responses, range of participants, and overall ratings of OLA for the 2001-2003 period. Over the two-year period, 852 individual participants attended 45 seminars. 50.5 percent of all responses rated seminars as “very strong” (6 on a 6-point scale). Eighty percent of all ratings clustered into ratings 5 and 6. The mean rating for all seminars combined was 5.26. Table 3 indicates the range of

seminar topics offered in 2002-2003 and the respective number of questionnaires returned for each seminar. Table 4 shows that overall mean ratings in the areas of seminar content, presentation, outcomes, and general considerations were all above 5.0.

Quality of Content, Instruction, Faculty, and Organization

To answer the question, *What is the quality of OLA seminars?*, questionnaire items were grouped to reveal perceptions of content, instruction, faculty, and organization. Figure 2 indicates that the highest ratings were for faculty member's expertise, preparation, and sensitivity to needs and interests of participants (mean = 5.53). The lowest were for organization and format, though the mean was still high at 5.16. The highest single item rating was for "Faculty expertise in respective areas" (mean = 5.72) and the lowest was for "match between amount of content and allotted session times (mean = 4.84).

Relevance and Application

Data indicated that the highest ratings for relevance and application occurred for items relating to the field at large. The lowest ratings were for relevance and applications to local organizations (Figure 3). These data correspond with those for "problem solving," which had the lowest ratings of any item related to instruction (Figure 4).

Comparison of Seminar Quality with Relevance/Application

Overall ratings were lower for items related to relevance and application than they were for the quality of content, instruction, and organization (Figure 5).

Emergent Themes from Qualitative Data

Site visits, interviews, and free-response items on questionnaires resulted in a series of themes that emerged from coded data. The broad themes included the following:

The Quality of OLA Seminars:

1. Topics and content represent consistently high standards of substance, accessibility, insights and knowledge, consistency with participant expectations, and fulfillment of participants' learning needs.

"I appreciated thinking about ways to change my patterns and to work toward more cooperation across the facets of our orchestra. It makes so much sense."

2. Participants value the diversity and balance among styles, instructional approaches, and learning activities.

"I loved being engaged and challenged in so many interesting ways. I never felt bored."

3. Faculty are experts in their fields, representing exceptional knowledge and experience, both inside and outside the orchestra world.

"Not only was the faculty's wealth of experience and knowledge amazing, but they were incredibly effective in communicating their ideas."

4. OLA seminars are well-designed and well-organized, demonstrate clarity of purpose, and are consistent with their descriptions and the expectations of participants.

"I didn't have to worry about anything but getting to the seminar and taking advantage of all the new learning."

The Impact of OLA Seminars:

1. OLA seminars are relevant to the field at large, complement other national initiatives, and play an important catalytic role in advancing new models of leadership and management.

“It was enormously useful to get the big-picture view of the orchestra world today. The focus on our artistic core as a field was inspiring.”

2. OLA is relevant and applicable for individual orchestras and for individual staff roles within the orchestra.

“These ideas are definitely important for improving our orchestra’s culture. But I’m worried about how to enlist others who didn’t have the advantage of attending the seminar.”

Additional Findings from the 2001-2003 Evaluation Study

Both numerical and qualitative data indicated extremely strong perceptions of OLA among all participants. Site visits to orchestras suggested that attendance by teams of three or more individuals representing administrators, musicians, and trustees was particularly valuable in effecting applications from leadership seminars. One trustee commented, *“I’ve never heard how things seem to musicians before. We were using different language but basically saying the same things.”*

Data also indicated that more attention to problem-solving strategies and the particular issues of local orchestras would increase the value to participants. Representatives of smaller orchestras tended to feel that many topics and discussions related primarily to large orchestras, and large orchestra representatives sometimes felt hindered by the presence of individuals from very small operations. Participants also had

concerns about seminars being located in one or two major cities and suggested that regional locations would engender increased participation by limiting both the time and financial investment required to attend.

An important thrust of the seminars under the “Leadership and Organizational Change” category was toward collaborative decision-making involving musicians, management, and boards. The most persistent challenge revealed by the data was the perception by participants that transfer of learning to effect change in local orchestra cultures would be difficult because of attachments to the status quo by those who did not attend. Though some orchestras sent teams of individuals to seminars, many did not. Regardless, the idea of either one individual or a small team effectively overcoming active or passive resistance to change seemed daunting. Participants frequently felt that the demands of their day-to-day work would make it nearly impossible to implement the concepts and strategies they had learned in the leadership seminars

Influence of the 2001-2003 Study on the Evolution of OLA

Adjustments to OLA based on the 2001-2003 study were both operational and conceptual. Operationally, more regional locations were designated, faculty were encouraged to plan for active engagement and more problem-solving tasks, and strategies were suggested for facilitating dialogue among representatives of diverse orchestra cultures. Conceptually, institutional impact of seminars, particularly those in the Leadership and Organizational Change category, became a predominant concern. In particular, the development of strategies to aid and assess transfer and implementation in local settings assumed added significance. Annual evaluations subsequent to the 2001-

2003 study continued to support the trend of extremely favorable perceptions of content, instruction, and overall relevance/application. Therefore, strategies in these areas were modified only slightly in direct relation to varying topics and faculty.

The Institutional Vision Program

Given the demands of ongoing operations in local orchestras, it became evident to the League that effecting lasting change would require incentives, focus, mentoring, and tracking. In 2005, the League secured funding to undertake a groundbreaking program that would offer ten orchestras the opportunity to implement action plans related to their particular concerns over a two-year period. Orchestras would be required to submit an application that identified a particular “issue” or “problem” they hoped to address. If selected, they would need to commit to the attendance of a team of three key individuals, representing management, musicians, and the board, at a one-week seminar led by the former Executive Director of the Cleveland Orchestra, Tom Morris. Morris had led prior seminars on institutional vision, including core values and collaborative management styles. He would be supported by a faculty team including a symphony musician, a board member, an organizational psychologist, the program evaluator, and League staff.

In July 2005, ten orchestras representing a diversity of sizes, budgets, and reputations convened in Chicago. The intensive seminar included “case reports” from each orchestra on the key issue they hoped to address, interactive sessions that applied advanced management concepts to the key issues, individual orchestra consultation with faculty, and peer feedback. By the end of the seminar, each orchestra team had refined or revised their key issue and identified a starting point for their action plan. The action plan was required to be submitted within several months of the seminar, and progress

reports were required every six months. In June 2006, the ten orchestras reconvened to share their progress. Based on their first year's work, five of the ten orchestras were selected to continue a close affiliation with the faculty and to apply for consultative visits. The program evaluator also conducted site visits of these five orchestras. In July 2006, a second group of ten orchestras was inducted into the Institutional Vision program.

Evaluation of the Institutional Vision program to date indicates that participants have benefited significantly from the interactions within and across teams. Limiting the program to a cohort of ten orchestras provides an opportunity for in-depth focus and problem-solving that is impossible in larger groups. Most teams reported that they had never before dialogued across roles about issues facing their orchestras. Musicians, particularly, began the seminars with considerable skepticism. However, by the end of the seminars, they had become fully integrated into the process.

While the key issues orchestras identified varied considerably, most, not surprisingly, dealt with some aspect of financial stability. With the assistance of faculty, they were generally able to see that financial stability was part of a much larger picture of institutional identity and vision, and that ownership of common goals among all members of the orchestra family is an essential element of progress. Nearly all orchestra teams worried about their ability to implement change at home. Nevertheless, whether undertaking an endowment campaign, reorganizing a board, or engaging the public around an orchestra's artistic vision, orchestras have discovered that the relationships among team members and their mutual commitments to identified goals have helped engage a broader cross-section of constituents than would have been possible otherwise.

In nearly all cases, progress has not been as rapid as hoped, but measurable changes are occurring.

On-line Mentoring Circles for Board Members

Another concrete development arising out of the League's continuing effort to assist orchestras in making positive change is the use of on-line mentoring circles to support incoming board chairpersons in understanding their roles. As these are volunteer positions, participation represents a considerable investment of time and energy. Led by an individual who has chaired both the board of a prominent orchestra and the League's board, the circles consist of five or six participants whose orchestras represent similar budgets and cultures. Through readings, discussions, and problem-solving strategies, board chairs are introduced to effective leadership and the goal of cross-constituent investment in the well-being of their respective orchestras.

Early feedback from participants indicates that the circles have raised issues and topics that are common across orchestras. Not only do the participants appreciate the experience and expertise of the circle leader, but they also value the support of colleagues who can be called upon for confidential consultation and advice. The most apparent value seems to be the existence of a forum that involves both the introduction of issues and the opportunity to bring issues to the table.

Conclusion

The Orchestra Leadership Academy is constantly maturing as a lifelong professional learning provider. Its evolution has demonstrated a delicate balance between responsiveness to needs identified by musicians, management, and board members and

leadership for change that is generated by a concern for the long-term health and sustainability of orchestras. By combining high-level faculty and content, instruction geared to the learning needs of adults, access to programs, and focused support for change, OLA has established a model that might well be emulated by other professional service organizations. Not only are individuals growing in their knowledge and applicable skills, but major institutional change is occurring at both local and national levels. Such efforts may be the best hope for ensuring a continuing place for orchestras in the twenty-first century.

APPENDIX

Figures and Tables in Order of Text References

Table 1: *Number of OLA seminars and completed responses received, 2001-2003*

	<u>Number of Seminars</u>	<u>Completed Responses</u>
2001-2002	20	347
2002-2003	25	505
Total (2 years)	45	852
Percent Increase (Year 1 to Year 2)	25%	45.5%

Table 2: *Self-identified roles of OLA participants, 2001-2003*

	<u>2001-2002</u>	<u>2002-2003</u>	<u>Combined</u>	<u>Percent Increase</u>
▪ Executive Director	58	200	258	244%
▪ Marketing	46	114	160	147
▪ Music Director	44	109	159	113
▪ Development	35	101	136	189
▪ Education	35	76	111	117
▪ Musician	25	86	111	244
▪ Public Relations	29	80	109	176
▪ Community Relations	27	69	96	155
▪ Board Chair	25	72	97	188
▪ Staff Conductor	22	50	72	127
▪ Artistic Administration	19	51	70	168
▪ Operations	15	49	64	227
▪ General Manager	16	41	57	156
▪ Trustee (not chair)	15	39	54	106
▪ Finance	10	34	44	240
▪ Direct-service Volunteer	12	30	42	150
▪ League Fellow	12	28	40	133
▪ Audience Services	5	25	30	400

Figure 1: *Overall ratings of OLA seminars, 2001-2003*
(Scale = 1(very weak) to 6(very strong))

Mean = 5.26

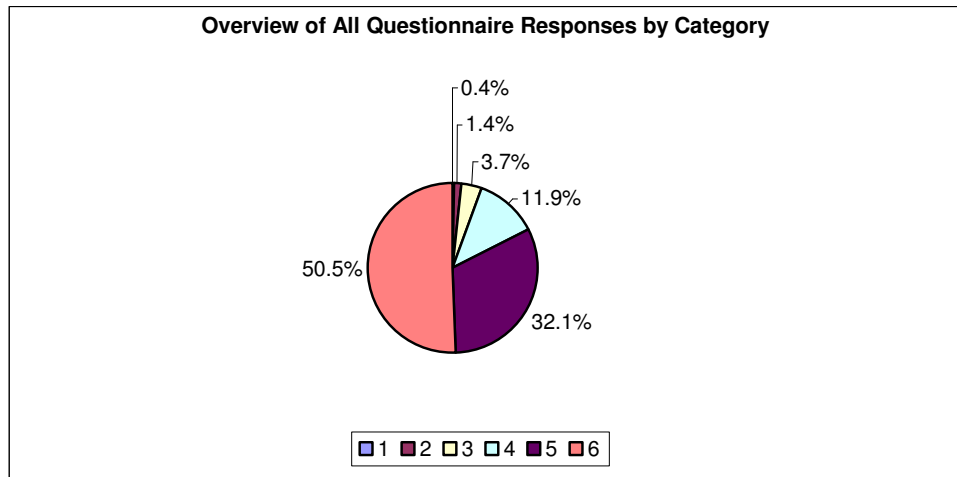


Table 3: OLA seminars and numbers of attendees for 2002-2003

A. Total Responses Received: 505

B. Number of Responses Received for each Seminar:

Category I – Leadership and Organizational Change

1. Striving for Greatness	21
2. Building Effective Cross-Functional Teams	19
3. Managing Critical Transitions	21
4. Tackling Today's Economic Challenges (New York)	41
5. Tackling Today's Economic Challenges (San Francisco)	17
6. The Executive Director/Board Chair Nexus	21
7. The Governance Equation	22
8. Maximizing Your Effectiveness as a New Executive Director	20
9. Roles and Responsibilities of Music Directors	13
10. Music Director Search Seminar/National Conductor Preview	24

Category II – Strengthening Professional Skills

1. Synergy	13
2. Creating Great Programs	26
3. Programming for Pops	17
4. Everything You Need to Know about Orchestras	14
5. Financial Modeling for Mathematically Challenged	3
6. Orchestra Operations	8
7. Positioning the Orchestra	25
8. Electronic Media: What You Need to Know	14
9. Enhancing Staff/Volunteer Relationships	21
10. Securing the Legacy	23
11. Orchestra/Community Connection	18
12. Thulean Conducting Workshop I	36
13. Thulean Conducting Workshop II	26

Category III – Building Careers

1. Essentials of Orchestra Management	19
2. Introduction to Marketing	23

Table 4: OLA responses by questionnaire categories

<u>2001-2002</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>Mean</u>
Seminar Content	.6	1.7	3.2	10.4	30.6	53.5	5.29
Presentation	.4	1.3	3.3	10.5	32.2	52.2	5.30
Outcomes	.8	1.8	3.5	12.9	28.1	53.0	5.25
General Considerations	1.2	1.5	3.5	11.5	31.5	51.2	5.23
Overall – Year 1	.6	1.6	3.4	11.3	30.6	52.5	5.27
<u>2002-2003</u>							
Seminar Content	.00	1.3	3.8	11.5	32.9	50.5	5.26
Presentation	.6	1.1	3.8	12.7	34.3	47.5	5.28
Outcomes	.00	.7	3.6	12.4	33.6	49.7	5.29
General Considerations	.4	1.7	4.8	13.3	33.5	46.3	5.17
Overall – Year 2	.2	1.2	4.0	12.5	33.6	48.5	5.25
<u>Two-year Totals</u>	<u>.4</u>	<u>1.4</u>	<u>3.7</u>	<u>11.9</u>	<u>32.1</u>	<u>50.5</u>	<u>5.26</u>

Figure 2: Ratings for faculty and organization/format of OLA seminars, 2001-2003

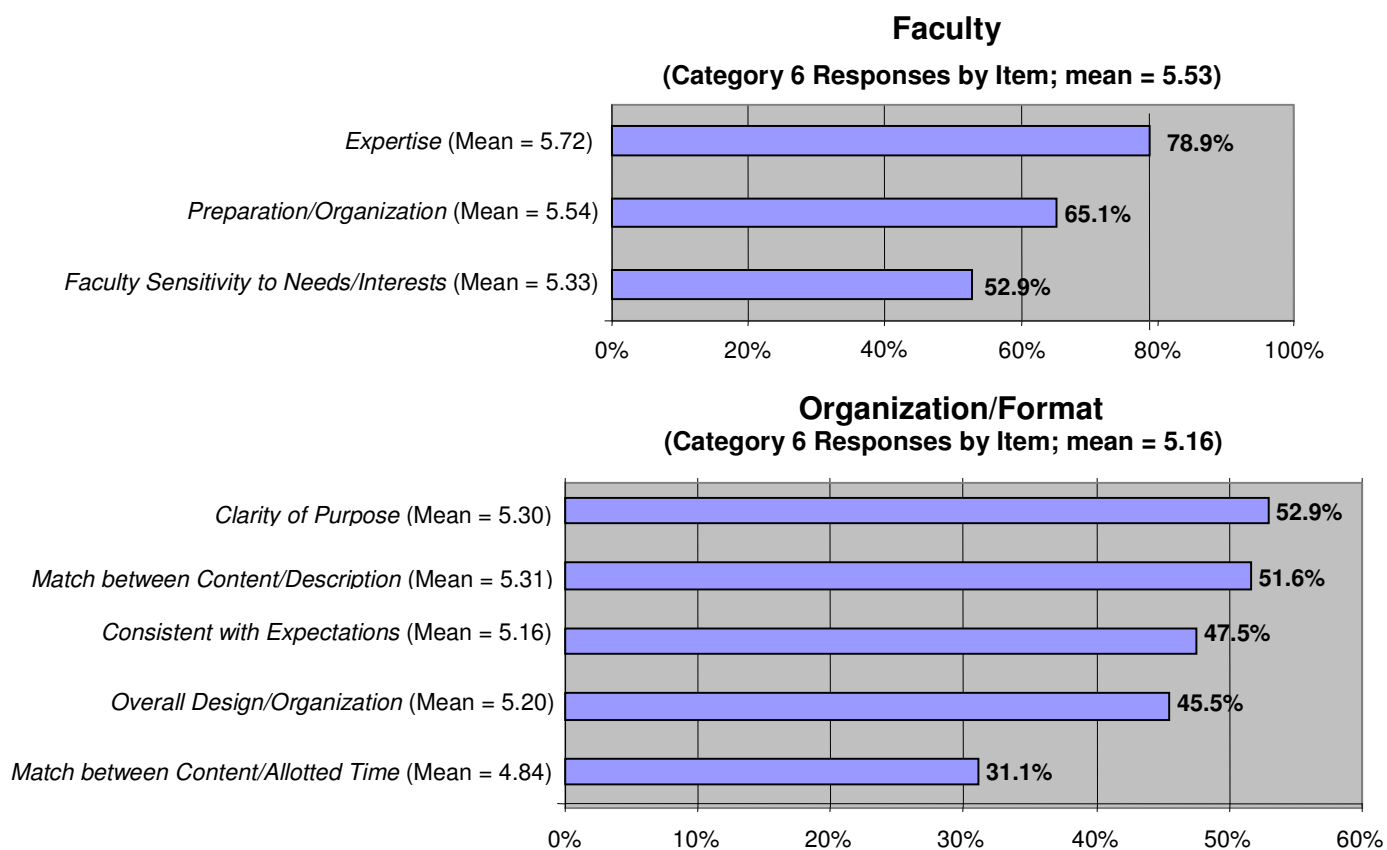


Figure 3: *Relevance/application ratings for OLA seminars, 2001-2003*

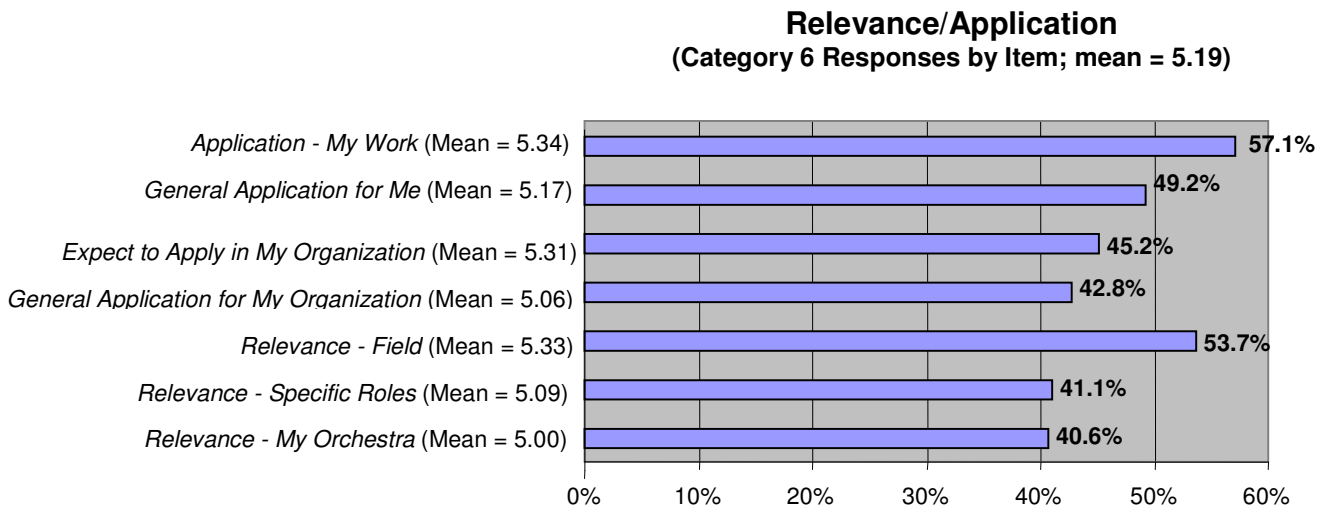


Figure 4: *Ratings for “problem solving” in OLA seminars, 2001-2003*

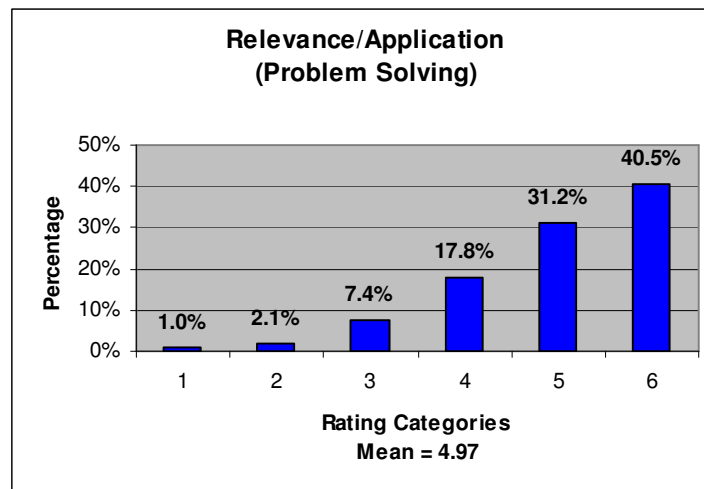


Figure 5: Comparison of quality and relevance/application ratings for OLA, 2001-2003

