

**ENGAGING UNDER-REPRESENTED COMMUNITIES:
A COMPARATIVE ANALYSIS OF PROFESSIONAL
SYMPHONY ORCHESTRAS**

By:

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A Master's Research Project

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Development and Sales:

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Abstract

This Master's Research Project looked into the various ways that professional symphony orchestras are engaging with their community, specifically with under-represented populations. The paper begins with an overview of the American symphony orchestra, and clarifying why it is now needing to engage more with its community rather than only performing concerts. The research also presents various literature reviews and comparative analyses that shed light on what is currently being offered by symphony orchestras around the country, including an in-depth exploration of community engagement and education programming around the country. The study then focuses on comparative case studies highlighting the programs and populations being served by the Seattle Symphony, Oregon Symphony, Eugene Symphony and the Boise Philharmonic. This project found that there is a wide variety of programming for under-represented populations and is usually specific to the community that the symphony represents. A major focus among professional symphony orchestras is centered around diversity, equity and inclusion, with many looking to develop initiatives within the entire organization.

Keywords:

Audience Development

Community Engagement

Under-Represented Populations

Programming

Diversity, Equity and Inclusion

Symphony Orchestras

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CHAPTER ONE: INTRODUCTION AND RESEARCH DESIGN

1.1 Introduction and Background

There has been a growing focus on community engagement within the performing arts community, and more specifically in professional symphony orchestras. The symphony orchestra was originally created by the community and for the community, but it grew to be considered a “high art” and inaccessible to many but the elite. Through the years, these orchestras have looked into ways to attract more people to buy tickets. The reality for many, if not all, professional symphonies in the United States is that they cannot rely on ticket sales alone to remain sustainable (Noonan, 2016). With the decline in music education in the public school system, most children and many young adults do not have any exposure to classical music. This then results in a lack of interest because it does not seem relevant or they may feel intimidated at the idea of attending a concert. Because of this decline, symphonies are looking for ways to remain relevant in their communities and they do this in a variety of ways: programming, education and community engagement.

This paper touches on all three, but focuses on community engagement specifically. Community engagement is also be broken down even further into different categories of engagement based on programming currently being offered. This study then focuses on programming which involves under-represented populations of an orchestra’s community. It explores what programming is available, who is being served and why this population was chosen. Symphony orchestras are looking for ways to stay relevant and financially stable, and becoming aware of ways that other organizations are approaching this issue may help.

1.2 Conceptual Framework

Symphony orchestras are a member of the performing arts sector, and naturally much of their focus will be on just that: performing. However, times are changing and unfortunately these organizations are no longer sustainable through ticket sales alone (Noonan, 2016). Much of the literature available studies programming, marketing and audience development. These studies investigate ways in which a symphony can bring new people to their events, or maintain the loyalty of those already attending. Another approach is looking at maintaining current customers. Rentschler, Radbourne, Carr and Rickard (2002) argue that instead of focusing on attracting new audience members performing arts organizations should be working on developing and maintaining existing ones. They discuss a shift from focusing on developing quality of product to developing relationships with their customer base.

Many people do not feel that classical music is relevant, and the reason for these opinions are often a result of limited or nonexistent musical education. Michael Kaiser (2015) argues that because of a decline in music education, children have a lack of exposure to the arts and thus do not view it as “a vital, consistent part of their lives” (p. 51). Kaiser also discusses programming available to children as not always the most sustainable option as they are simply offered a brief interaction with an organization instead of a long-term education. Education is a main focus for many symphony orchestras, and often they will have a youth orchestra, young musician competitions, and other opportunities for children to interact with their local orchestra and to gain valuable music education.

There is very little research done on community engagement within the symphony orchestra other than what may come up in research on music education or audience development. The League of American Orchestras, an authority figure on data and advocacy among

professional symphony orchestras, often puts out reports reflecting the financial health of symphony orchestras in the United States and other information to show the validity of these organizations. In their report, *Orchestras at a Glance*, they write that: “Reports from 98 of the more than 1,200 orchestras across the U.S. indicate that those orchestras alone offered over 5,000 education and community engagement concerts and an additional 13,750 other activities and events in 2013-14, serving more than 2.1 million participants” (Noonan, 2016, p. 2). This then ties in with another report by the same organization, *Orchestra Facts: 2006-2014*, which had a chapter entirely focused on community engagement.

The League sent out a supplemental Education and Community Engagement (EdCE) survey which resulted in the participation of 98 symphony orchestras from around the country (Voss, Voss, Yair & Lega, 2016). This study showed that “the 98 orchestras offered a total of almost 19,000 education and community engagement opportunities in 2014” (Voss et al., 2016, p 8). They continue on to show that 69% of these programs did not involve performance, and 85% were held in venues other than concert halls (see Figure 4 and Figure 5 of Voss et al., 2016, for complete data).

1.3 Theoretical framework

This study focused on the *why* behind community engagement, and explores more specifically into why symphonies may choose to engage with specific populations and how these programs function. To understand the reason symphonies are working more within their community, there needs to be a foundation of knowledge surrounding the history of the symphony orchestras, its role within their community and current economic climate within symphony organizations. Once this foundational knowledge was established, this research

looked at the various ways a symphony might choose to interact within the community (engagement, education or audience development). However, the main focus was on community engagement programs and specifically those which engage under-represented populations. This was done with multiple literature reviews and a development of categories for various types of engagement a symphony orchestra may be involved with.

The bulk of this study analyzes various programming currently being used around the country through website and other online information, as well as comparative case studies featuring four professional orchestras from the Pacific Northwest (see Figure 1.1). These analyses examine similarities between the programs regarding population served, budget and location of the symphony, and the structure of the program itself. The case studies include interviews with key Community Engagement Directors/Managers, website and document analysis from each organization. Ongoing review of literature will be necessary in studying the history of the symphony orchestra and current financial state, audience development, education and community engagement within the arts.

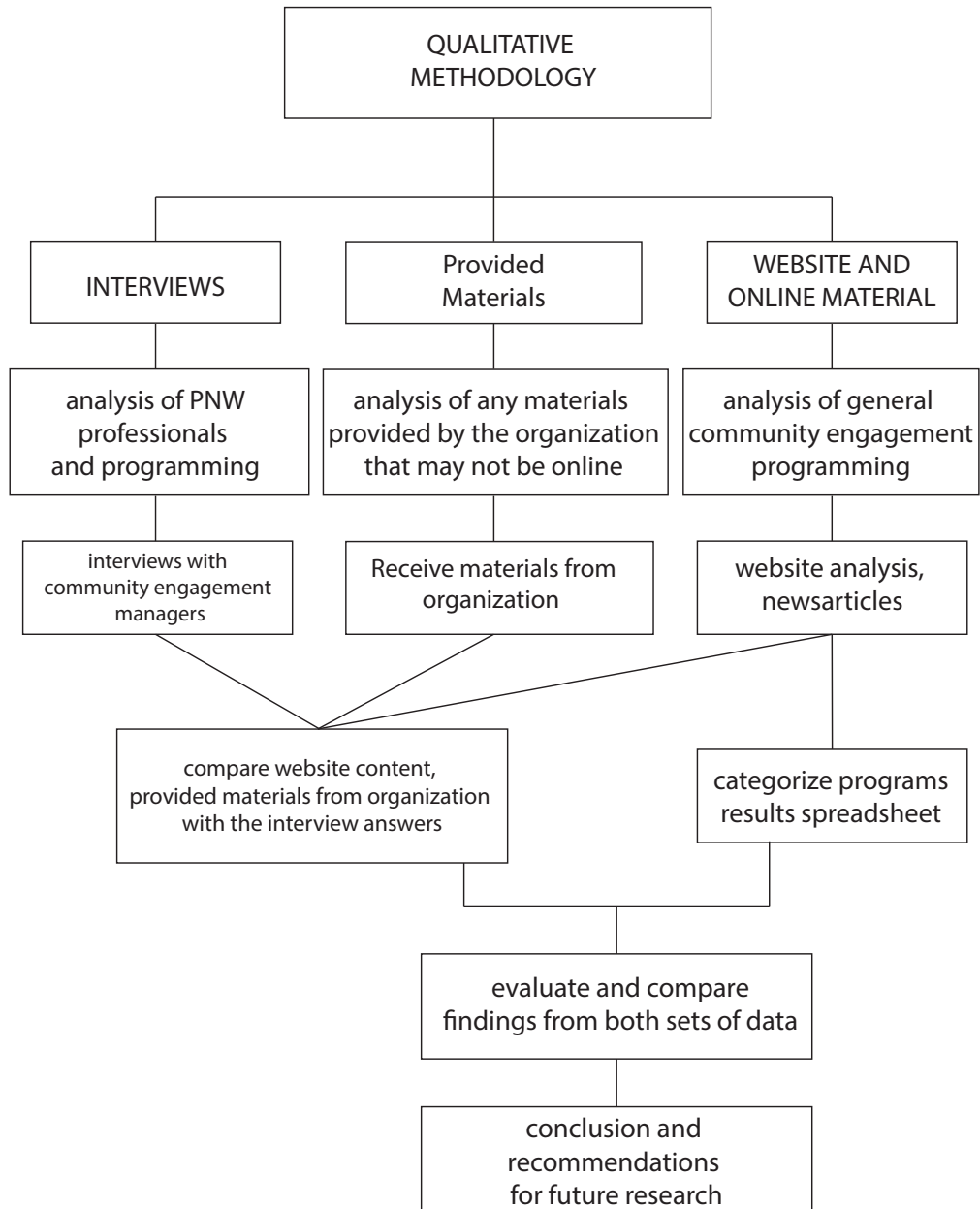


Figure 1.1 – Data Collection Schematic

1.4 Purpose Statement

The intent of this study was to examine ways in which professional symphony orchestras of varying levels are engaging with under-represented populations within their community. It explores the variety of people served and why these organizations have chosen to work with these specific populations. The comparative nature of this research aims to serve as a reference tool to those working within the community engagement field and will help to share best practices and ways in which various symphony orchestras are serving their community.

1.5 Methodological Paradigm

The research was conducted using a constructivist and critical approach, in order to effectively analyze the data and relay the conclusion in a way which will benefit participants and others involved with a professional symphony orchestra.

1.6 Role of the Researcher

I conducted this research with my background knowledge in music performance, arts administration and experience working within a professional symphony. Both my personal and professional biases stem from this experience. As my background is mostly within a performance setting, I looked at this information through the lens of a performer. However, with my current studies and experience as an arts administrator I also looked at this research through an administrative lens. I, too, have grown accustomed to viewing the symphony orchestra as simply a performing entity, but have come to realize that this model is no longer sustainable. Furthermore, the symphony orchestra has so much potential as a positive influence to the community that they have an obligation to program accordingly.

1.7 Research Questions

1. How are professional symphony orchestras engaging under-represented populations within their community?
 - 1.1. Why should a symphony be engaging with its community?
 - 1.1.1. What are some of the issues that symphony orchestras are facing?
 - 1.2. What are the various ways of engagement and some of the programs currently available?
 - 1.2.1. What are the categories of engagement, different populations served and programs for each population?
 - 1.3. How are professional symphony orchestras in the Pacific Northwest engaging with their community?
 - 1.3.1. How do the programs in the region compare?
 - 1.3.1.1. What is the structure of these programs, who are they serving and why did they choose to work with this population?
 - 1.3.2. How does the size/budget of the symphony effect their level of engagement?

1.8 Definitions

1. **Professional symphony orchestra:** typically, these are classified as a 501c3 nonprofit with the IRS, and employ administrators and musicians.
2. **Under-represented populations:** these can be seen as populations that may not have access or immediate desire to get involved with their community's orchestra. Examples include, but are not limited to: prison populations, disabled, low-socioeconomic, at-risk youth, etc.
3. **Diversity, Equity and Inclusion:** ways in which an organization can not only diversify their audience but also make their services equitable and inclusive for all people.

4. **Community engagement:** ways in which an organization is providing a service for its community.
5. **Audience development:** methods of encouraging new audience members and retaining current audience members to attend performing arts related events. For the purpose of this study, these events will be in reference to symphony concerts and programs.

1.9 Delimitations and Limitations

This study initially examines the professional symphony orchestra and why it is important to look into its engagement with the community, this then follows with ways in which professional orchestras around the country are engaging and what populations they are reaching. From here the study is narrowed down to focus on four specific professional symphony orchestras within the Pacific Northwest: Seattle Symphony, Boise Philharmonic, Eugene Symphony and the Oregon Symphony. These are used for case studies as they represent two sizes of symphony orchestra – Eugene Symphony and Boise Philharmonic fall into the same category as do the Oregon and Seattle Symphonies. The study focuses specifically on community engagement and how they are interacting with under-represented populations, although a brief overview of other programming is noted. Interviews were conducted with the director of community engagement.

Possible limitations included the feasibility of making contact with all four organizations. It was the hope to at least interview Community Engagement Directors and/or other related staff from all four of these orchestras, which did end up happening. However, while valuable lessons were learned from participating organizations, these cannot be generalized to all professional orchestras.

1.10 Benefits of the Study

The main benefit of this study is to learn from what other organizations are already doing within their community. Symphony orchestras need to become relevant to the community in which they are housed and simply performing concerts every month is no longer enough to allow these organizations to be financially stable. Furthermore, with many schools dissolving music education, this will be the only way that many of these populations are participating in music of any kind. Though many of them are not children, the effects of music can still be a positive impact on their life.

1.11 Research Design

Research approach/dimensions of research

This study contains a few dimensions, which include literature reviews on various subjects pertaining to the research question, a comparative analysis of website content for community engagement programs around the United States, and comparative case studies involving four professional symphony orchestras from the Pacific Northwest. These varying approaches focus on the reason for community engagement, a broad look at options within the sector, and a narrowed view of select orchestras within the region. This research began in November 2017 and concluded in May 2018.

Strategy of inquiry

Much of the literature available discusses audience development and how an orchestra, and other performing arts entities, can encourage new audience members and program to reflect a change in attendance. While this is important to understand, it is clear that ticket sales are not

allowing for sustainability and many orchestras are already part of community engagement programs (Voss et al., 2016; see also Noonan, 2016). These reports were based on a survey sent to a high number of orchestras with 98 sending back their responses. While their approach helped to give statistical analysis of programs being offered, this study will focus more on the content and structure of these programs. Additionally, the report drew on demographics of those in attendance for these programs but did not provide any other details.

Many sources, though not necessarily focused on community engagement, focus on case studies and comparative case studies which highlight the area of study. The Wallace Foundation has many examples of this, and though much of it is concentrating on building audiences the content can still be useful in this area. *“Can the City’s Boom Mean New Audiences for Seattle Symphony?”* is one such study, and focuses on the wave of new residents to the city as a result of large corporations growing roots in the community (Dobrzynski, 2017). They discuss their “new concert formats” (Dobrzynski, 2017, p. 3) and how they are hoping to reach the many generations of new residents. An example of a comparative case study is Harlow’s article which examines four different arts organizations and how they successfully opened up their programming to new audiences and made themselves more accessible (Harlow, 2014). Case studies seem to be the most common form of research in this area, and it could be because of how little literature there is available. These are approaches that were used in this study as they will help to shed light on what orchestras are doing, and how programs are structured.

Overview of Research Design

This research primarily focused on community engagement within the professional symphony orchestra, and was narrowed down to study ways in which these orchestras are

engaging under-represented populations of their community (see Figure 1.2 for Conceptual Framework Schematic).

1. Selection of Sites:

As there were two different analyses performed in this study, there were two approaches to the selection of sites used:

- 1.1. Website and online content analysis: sites were chosen based on similarities and also by unique programming, and symphonies of varying budget and location were examined.
- 1.2. Comparative case studies: these focused on four professional symphony orchestras from the Pacific Northwest and featured two with a smaller budget and located in a lower populated area, and two with higher budgets and in a more populated area. These four orchestras were chosen based on location and feasibility of performing the study. The organizations are as follows:
 - 1.2.1. Seattle Symphony, Seattle, WA
 - 1.2.2. Oregon Symphony, Portland, OR
 - 1.2.3. Eugene Symphony, Eugene, OR
 - 1.2.4. Boise Philharmonic, Boise, ID

2. Selection of Participants:

Demographics varied based on location of the symphony orchestra, and there were not any specifics necessary with the exception of occupation and department. As this study focused primarily on community engagement and the programs in which symphony orchestras support, employees in community engagement roles were the main focus.

- 2.1. Interviews were conducted with the four symphonies mentioned above. Interviews were held with the community engagement director/manager. Both emails and paper

letters were sent to the heads of Community Engagement. At least four subjects were interviewed, one from each organization.

Anticipated ethical issues

While there was no anticipated ethical issue with this study, it was possible for some to arise. Because of the communities that were primarily studied, it was possible that how they were portrayed in this study might not be how they wanted to be seen (i.e. under-represented). However, this language was not meant to segregate but merely describe various communities that are literally under-represented by symphony orchestras. Another possible issue was my own bias which could have stemmed from my background in performance and my limited experience in community engagement.

Expectations

Through this study I expected to find a variety of programs that reached a diverse audience. Many of the programs were expected to be similar if not the same with many of the same populations being served. However, it was also expected to find unique programming specific to the community, size and budget of the specific symphony orchestra. It was the hope that those involved with this study will become more aware of their position within the community, and also what other orchestras might be participating in.

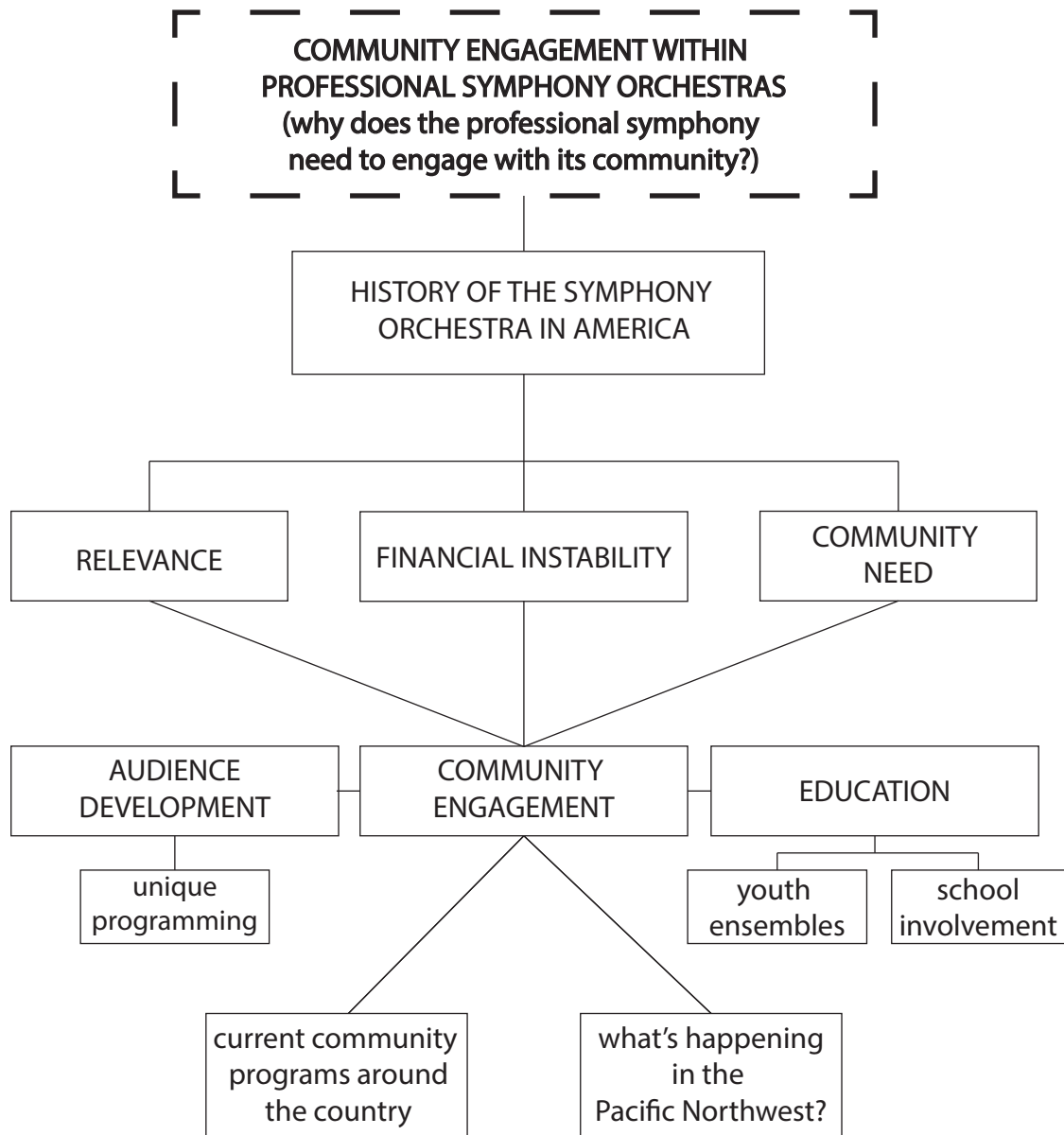


Figure 1.2 – Conceptual Framework Schematic

1.12 Data Collection and Analysis Procedures

Overview

Data was collected from two sources: website analysis, and interviews. Website analysis used the online material from 10-20 symphony orchestras around the country. Interviews were conducted at four professional orchestra sites: Eugene Symphony, Oregon Symphony, Seattle Symphony and Boise Philharmonic. These interviews included directors/managers from these orchestras' community engagement department. Interview lasted around 45 minutes to 1 hour, and took place at a location of the participant's choice. See **Appendices A** for research instrument.

Research population and recruitment methods

A written letter was sent to potential interview subjects, and followed up with an email. If there was no response, then participants were called on the phone. See **Appendix B**.

Informed consent procedures

Each interview participant was given an informed consent form which outlined any possible risks with participating in the study. These were explained to the participant and a signature was collected on each consent form prior to the interview. See **Appendix C**.

Provisions for participant and data confidentiality

The above mentioned informed consent form highlighted that they were consenting and were knowledgeable that their name and/or position title may be used in this study. It also stated that all notes and audio recordings would be stored on a password protected computer, and

would be used for analysis unless the participant had consented for direct quotes. All materials will be destroyed within one year of the completion of this study.

Potential research risks or discomforts to participants

While the risks involved with this study were minimal, there were a few that may occur.

Psychological Risk could have occurred if, at any time, the participant felt anxiety, embarrassment, or that their privacy might be invaded. While these were unlikely, it was possible that being interviewed and having their interview used in a study could result in this risk. *Social Risk* might arise if they happened to disclose some information which may be seen as controversial among their peers and colleagues. This could then result in hostility, loss of relationship or negative standing with certain groups. The main occurrence of this risk would have been when actively discussing programs which involve under-represented populations. If perhaps the portrayal of these groups is not accurate or comes across as distasteful. This could also have produced *Economic Risk* if this same occurrence then resulted in termination, or the inability to get promoted or another job.

Potential benefits to participants

Potential benefits to the participant are numerous. The study might validate that their program is an important part of the community and that it is positively impacting lives. Exposing more people to the mission of their organization and the programs that they provide for the community, this could then help with participation and future funding. Self-awareness of their organization, mission and the programs that they currently offer or hope to offer in the future could benefit the organization.

Data collection and disposition procedures

Data was done using the following: audio recording, computer entry, and field notes. With interviews, audio recording was used unless specified in the informed consent form, and a combination of field notes and computer entry was used.

Preliminary coding and analysis procedures

As interview subjects were asked to give consent to use their name and position, there was no need to code their information within the research instruments. Coding was used to differentiate categories of engagement and the four Pacific Northwest symphonies to make it easier for analysis. Website and online content was analyzed alone to begin with, and was sorted into categories of engagement based solely on program content and community served. Later this was analyzed to see if there was a correlation between population, location and size/budget of the orchestra. Interviews were analyzed for similarities and differences, and followed the same analysis as the online content.

Strategies for validating findings

All findings were analyzed to find any similarities and significant differences. Similarities may include population served, programming type, where the program is offered, etc. While initial findings were sorted into categories, they were then analyzed based on location of the orchestra, size of the orchestra, and their budget. This was a more realistic approach to the findings, as many of these factors contribute to the type of programming a symphony orchestra might take part in.

1.13 Investigator Experience

The main investigator of this research holds a Bachelor of Music in Music Performance from the University of Oregon, and a Master of Music in Music Performance from the University of Wyoming. Both degrees had a concentration in saxophone performance. At the University of Wyoming, the researcher worked with Athletic Bands as their Graduate Assistant and wrote a Master's Thesis entitled: *A Performer's Guide to Prelude, Cadence et Finale*. She is currently working towards the completion of a Master of Science in Arts Management with a Performing Arts Concentration and a Certificate of Nonprofit Management at the University of Oregon with an expected graduation in June 2018.

CHAPTER TWO:

THE UNITED STATES SYMPHONY ORCHESTRA: FROM THE BEGINNING UNTIL NOW

The orchestra, and more specifically the symphony orchestra, has been a form of art and entertainment in a variety of societies and cultures for a very long time. This chapter will focus on the history of the symphony orchestra in the United States, and current issues that professional symphony orchestras now face, and factors that have led these organizations to focus on community based programming. More specifically, this chapter will discuss reasons that orchestras are now developing programs unrelated to their performances to benefit, and engage, the communities in which they are housed.

2.1 History of the Symphony Orchestra in America

The history of the symphony orchestra in the United States can be traced to what is now known as The Harvard-Radcliffe Orchestra (“History,” n.d.). “America’s Oldest Symphony Orchestra” began on the night of March 6, 1808 when the Pierian Sodality was formed by six Harvard men (“History,” n.d.). This six-person group eventually became The Harvard Orchestra (now The Harvard-Radcliffe Orchestra), which can be credited with developing the music in both Cambridge and Boston (“History,” n.d.). The Boston Symphony’s creation is a result of the influence of the early Pierian Sodality (“History,” n.d.).

The New York Philharmonic, however, is the oldest major symphony orchestra in the United States (Craven, 1986). Since it was founded in 1842, the New York Philharmonic has been an important aspect of American orchestral culture and since conception has given thousands of performances, worked with important musical figures such as Leonard Bernstein,

Gustav Mahler, among others, and has premiered many important new compositions. The New York Philharmonic is actually the result of a few different mergers between other New York orchestras in the early 1900s which opened the door to becoming a resident orchestra at Carnegie Hall (Craven, 1986).

Carnegie Hall is also quite notable in the history of United States symphony orchestra, not only as a concert hall but with programming that they provide to the community. Carnegie Hall was built in 1890 by a group of notable business men who wanted a concert hall for their community (“Carnegie Hall: Then and Now”, 2017). Though prestigious and well-known today, this concert hall was not always in the best financial health. There was a period that the hall almost shut down, and management had to look into ways to make the organization more in touch with the community (“Carnegie Hall: Then and Now”, 2017). This initiative has continued to grow, and Carnegie Hall now offers many different programs that orchestras throughout the country can take advantage of (see Chapter Four).

Towards the end of the 19th century, many more orchestras were founded: St. Louis Symphony Orchestra (1880), Boston Symphony Orchestra (1881), Detroit Symphony Orchestra (1887), Chicago Symphony Orchestra (1891) and there continued to be a new orchestra being founded every few years through the 1900s (Craven, 1986). The Boston Symphony can be credited for being “the nation’s first permanent, independent, and disciplined orchestra” (Bernstein, 2014, p. 12). The orchestra was founded by philanthropist Henry Lee Higgins, and he had complete control over the orchestra including programming initiatives (Bernstein, 2014). He made it clear that “light” and popular music would only be played by the Boston Pops Orchestra in the summer, and the symphony would only perform music that Higgins and his conductors deemed worthy regardless of what their audience thought (Bernstein, 2014). Many

orchestras during this time were controlled by their founders and supported by wealthy individuals in the community (Bernstein, 2014).

Later on, journalists began to use five orchestras as a threshold to which other orchestras were judged against: New York Philharmonic, Boston Symphony, Chicago Symphony, Cleveland Orchestra and Philadelphia Orchestra (Oestreich, 2013). These became known as the “Big Five”, and were considered to be the best of the best. Oestrich (2013) explains, “A century or so ago, when classical music thrived in a nation of immigrants, orchestras were a powerful force, flagship institutions that helped to put American cities on the cultural map. And the Big Five, when it coalesced, helped, with its cumulative weight, to put American orchestras firmly on the international map. No other country could boast of such a constellation” (p. 5). The majority of orchestras were focused in heavily populated, urban areas at first but eventually began to expand to include smaller cities, regions and festivals.

This expanded network of orchestras led to the development of the League of American Orchestras (formerly American Symphony Orchestra League) which was founded in 1942, and became chartered by congress in 1962 (“About the League”, n.d.). Based on their website, a description is as follows:

The League of American Orchestras leads, supports, and champions America’s orchestras and the vitality of the music they perform. Its diverse membership of more than 2,000 organizations and individuals across North America runs the gamut from world-renowned orchestras to community groups, from summer festivals to student and youth ensembles, from conservatories to libraries, from businesses serving orchestras to individuals who love symphonic music. The only national organization dedicated solely to the orchestral experience, the League is a nexus of knowledge and innovation, advocacy, and leadership advancement. Its conferences and events, award-winning Symphony magazine, website, and other publications inform people around the world about orchestral activity and developments. (“About the League”, n.d.).

The League is a resource and advocate for symphony orchestras by providing professional development opportunities, reports and research, funding and advocacy for the necessity and importance of orchestral music within the United States.

Around the same time, Congress established the National Endowment for the Arts (1965): “the NEA is the independent federal agency whose funding and support gives Americans the opportunity to participate in the arts, exercise their imaginations, and develop their creative capacities. Through partnerships with state arts agencies, local leaders, other federal agencies, and the philanthropic sector, the NEA supports arts learning, affirms and celebrates America’s rich and diverse cultural heritage, and extends its work to promote equal access to the arts in every community across America” (“About the NEA”, n.d.). Through 2016, the NEA has funded \$423.8 million for music programs in the United States. Within the last ten years they have funded 1,750 (\$38 million) for concerts, festivals and tours among orchestras, choruses and operas. They also promote the creation of new compositions which they help fund (“Music Fact Sheet”, 2016, November).

From the mid-1950s to the mid-1980s art participation grew quite rapidly and it can be correlated to art and music classes being taught at all major universities in the country by the 1930s, and the radio bringing classical music into the homes of those that lived in small or rural towns (Bernstein, 2014). Commercials and cartoons featured famous opera singers, dancers and popular classical compositions (Kaiser, 2015). Attending a symphony concert was often seen as more of a social event than merely a cultural experience. Subscription sales played into this as many families would by the same seats every year and would look forward to seeing the same people sitting next to them (Kaiser, 2015). This method of purchasing tickets was convenient for both the organization and the customer: the organization did not have to worry about marketing

individual concerts or filling up empty seats with individual tickets, and subscribers could save money and put the event in their calendar for future reference (Kaiser, 2015).

This was when the culture and etiquette of attending symphony orchestra concerts became established. In Europe, most notably during Mozart's time, it was not uncommon for the audience to applaud, shout encouragements or merely have a conversation during a performance. Concert etiquette did not become popular until around the 1930s, even though the New York Philharmonic did post the following in their 1857 annual report:

We must necessarily insist upon musical good manners. The inattention and heedless talking and disturbance of but a limited number of our audience are proving a serious annoyance to our Philharmonic performances. The remedy for this, after all, lies rather with the audience itself than the society authorities. If each little neighborhood would take care of itself, and promptly frown down the few chance disturbers of its pleasures, perfect order would soon be secured. We hope this will be done. In foreign audiences it is effectively done. (Mueller, 1951, pp. 354-355).

While this may not have been the turning point for the culture of the symphony, this is what people think of now when a symphony concert is mentioned. Someone looking at them with a frown of disapproval if they might be disruptive, or they may simply feel like they will not fit in. This is one of the many areas that symphony orchestras are looking to change now.

2.2 Overview of the Modern Orchestra

Today there are orchestras in all 50 states and they make up a total of \$1.8 billion in budget expenses, and have an even higher economic impact in their communities with the jobs they offer, partnerships with local businesses, and what they purchase within the community (Noonan, 2016). Orchestras are almost always a 501c3 nonprofit organization, and rely heavily on their community to provide their services as ticket revenue accounts for less than half of their overall income (Noonan, 2016). Annual budgets range from less than \$30,000 to over \$100

million, and they are supported by a number of private and public donors within their community (Noonan, 2016).

Orchestras face the dilemma of increased labor costs even though productivity levels stay the same (a quartet will always take the same amount of players, and will always take the same amount of time to perform) which can result in financial struggles for the organization (Besana, 2012). Because of this, and other reasons, orchestras need to look into ways in which to diversify their revenue to overcome the rise in expenses that they will continue to face. As shown in Figure 2.1, concert revenue makes up less than 30% of an orchestras average annual income, meaning that performances are costing more and raising less.

Adult Orchestras' Total Revenues by Source

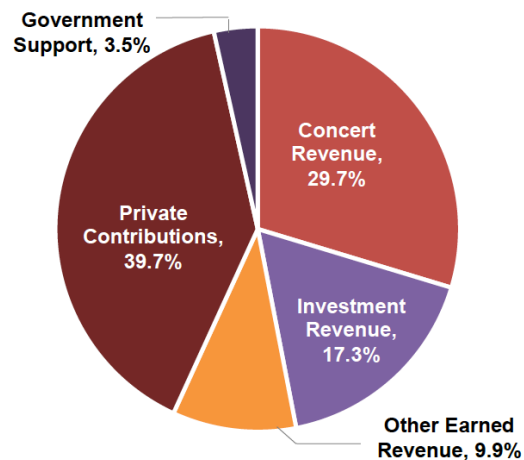


Figure 2.1 – Orchestra Revenues FY2013-14 (Noonan, 2016, p. 1)

There are 1,224 orchestras in the United States that the League of American Orchestras identified through analysis of IRS, DataArts, and OSR data (Voss, Voss, Yair & Lega, 2016 – See Figure 2.2). Combined they produced an estimated 28,000 performances, activities and other events that attracted a total audience of 25 million people in 2014 (Voss, et al., 2016).

These orchestras are in most of the bigger cities across America, sometimes more than one, and are also in many of the smaller cities as displayed in Figure 2.2. The idea of the “Big Five” orchestras is becoming non-existent as quality of performances are becoming very similar and there is no longer a comparison between only five orchestras near the east coast.

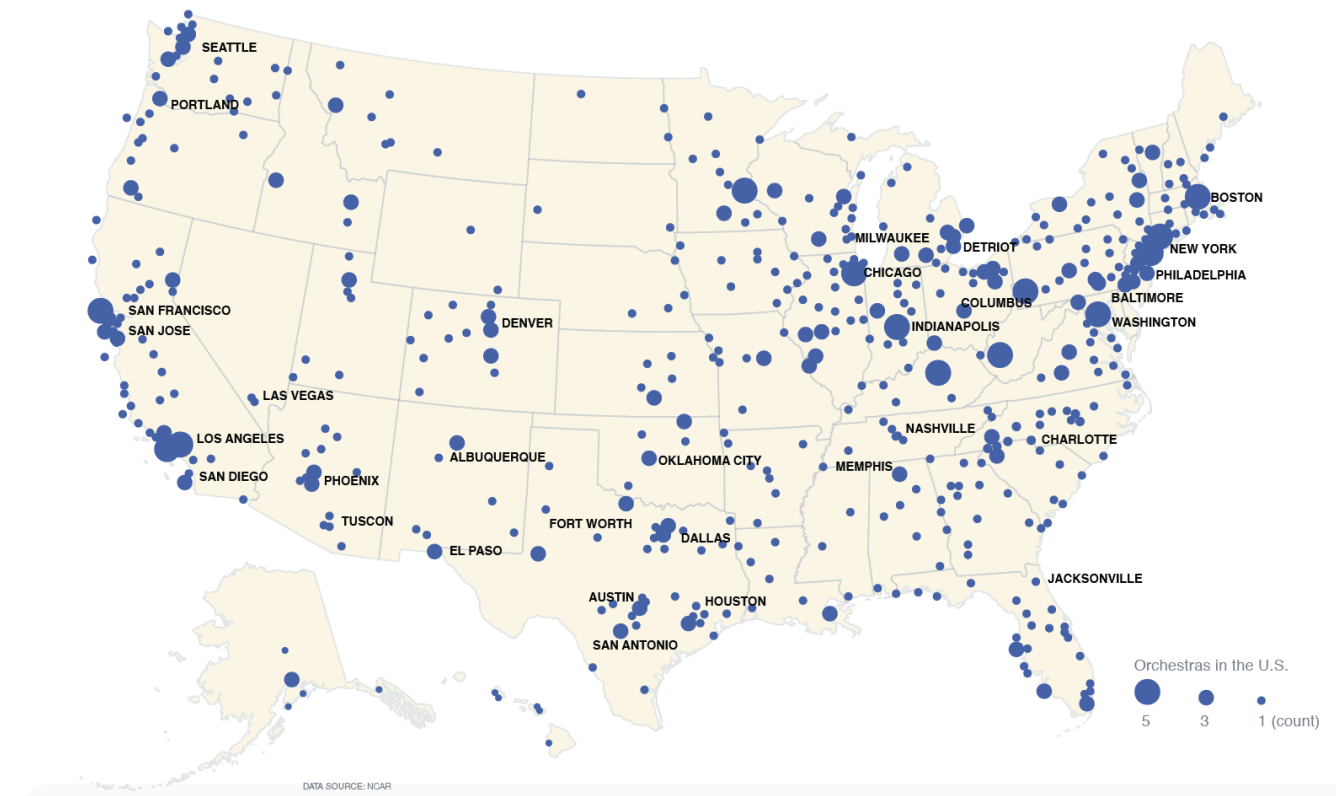


Figure 2.2 – Map of Orchestras within the United States (Voss, Voss, Yair & Lega, 2016, p. 6)

The majority of these orchestras maintain an annual budget of less than \$300k and second to that are orchestras with a budget range of \$300k - \$2 million, orchestras with a larger budget than this are in the minority (Noonan, 2016 – See Figure 2.3). The League of American Orchestras categorizes symphony orchestras by groups based on their budget size (Voss, et al.,

2016– See Figure 2.4). Often their reports are comparisons between the various groups, and it is helpful to understand what the precise breakdown is.

Orchestras by Budget Category

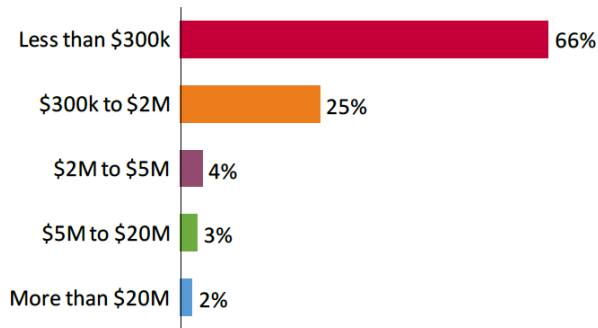


Figure 2.3 - Percentage of Orchestras by Budget Category FY2013-14 (Noonan, 2016, p. 1)

Budget Group	Number of orchestras in the OSR14 data set	Operating budget (2014)
A	21	\$20,000,001 or more
B	21	\$5,000,001 — \$20 million
C	24	\$2,000,001 — \$5 million
D	31	\$300,001 — \$2 million
E	10	\$300,000 or less

Figure 2.4 - Orchestra Group Classifications (Voss, et al., 2016, p. 25)

As mentioned before, the budget group classifications are often referenced in League reports and studies. These will be used throughout this paper and will be important to understand what the difference is between each category.

2.3 Current Issues That Orchestras Are Facing

Participation is an issue that all performing arts organizations are currently facing, and symphony orchestras are no exception (See Figure 2.5). With the rise of internet and television, people are finding other ways to entertain themselves from the comfort of their home (Kaiser, 2015). Some organizations are fighting this by offering live broadcasting to remote locations, or the opportunity to hear a performance from at home for a price (Kaiser, 2015). A severe decline in art education is seen as one of the reasons for a decrease in participation. Kaiser (2015) explains that “we are not truly educating our children to think of the arts as a vital, consistent part of their lives...” (p. 51). If children are not taught the value of music at a young age they will not grow up and suddenly decide to participate in something they have never learned to appreciate. As the core audience of symphony orchestras age it is even more important to engage these younger audiences as they are the future of music.

Percent of U.S. Adults Who Attended a Performing Arts Activity, by Type (Excluding Musical and Non-Musical Plays): 2002, 2008, and 2012

	2002	2008	2012
Classical Music	11.6%	9.3%	8.8%
Jazz	10.8%	7.8%	8.1%
Dance Other than Ballet	6.3%	5.2%	5.6%
Latin, Spanish, or Salsa Music	NA	4.9%	5.1%
Ballet	3.9%	2.9%	2.8%
Opera	3.2%	2.1%	2.1%

NA = This question was not asked before 2008.

Note: None of the changes between 2008 and 2012 are statistically significant.

Figure 2.5 – Participation in the Arts from NEA 2012 Survey of Public Participation in the Arts (Shewfelt, 2013, p. 12)

The Big Five orchestras are no longer held on a pedestal and used to judge the performances of others. Orchestra talent has moved west, with the San Francisco and Los Angeles Symphony Orchestra reigning supreme among the nation (Oestreich, 2013). Orchestras are becoming better and better, and it is difficult to tell the difference in quality from one to another (Oestreich, 2013). Unlike in the 1950s, 60s and 70s when people educated themselves on different artists, orchestras or organizations and took pride in understanding the difference between two different performances of the same piece, now they take pride in recognizing a classical piece of music at all (Kaiser, 2015).

Recording studios are no longer interested in selling classical music as they are having difficulties selling popular music (Kaiser, 2015). Many orchestras have their own record label and recording studio to provide music for purchase. There are also fewer stars in the field than there used to be, and it's become uncommon for an orchestra to feature a recognizable name other than the extremely famous Yo-Yo Ma, Renee Fleming, or Joshua Bell (Kaiser, 2015).

When orchestras were at their most affluent between the 1950s and 80s, they began building concert halls, hiring large management, employing huge orchestras, and spending a lot of money (Bernstein, 2014). This is what has caused most of the deficit today, and what has caused great orchestras like the Philadelphia Orchestra to declare bankruptcy or the Detroit Symphony Orchestra to cut musician wages by 23% (Bernstein, 2014). Stemming from the previous overview of the budgets of professional symphony orchestras, one issue that many orchestras (especially the more well-known organizations) are facing is backlash from significantly overpaying conductors and top administrators. Productivity in the arts also has not changed, and unlike in a factory where a product can be made faster and with less man-power, that is just not the case in the arts (Bernstein, 2014).

2.4 Subscription Ticket Sales

While subscription sales used to be the favored method for symphony orchestras around the country, there has been a gradual decline in recent years among major orchestras. The League of American Orchestras did note a slight increase in ticket sales during their 2008-2014 reporting (Voss, et al., 2016), and another report suggests a steady increase in subscription sales within orchestras of smaller budget yet larger organizations have faced a decline (Desai, 2015). Kaiser (2015) associates a lot of this with women entering the workforce as they were often in charge of family leisure, but this can also be attributed to busy schedules and jobs that are no longer set times each day. People simply cannot commit to an evening concert throughout the year.

2.5 Stigmas and Culture of the Symphony

The perceived culture of the symphony orchestra is something that is brought up frequently, as it is often a deterrent to many people and will cause them to avoid attending a symphony concert or event. This will be discussed more within the audience development portion of chapter three. While many orchestras are fighting to change this assumption, there is still a perceived culture and etiquette to attending a symphony concert. The Boston Symphony has an entire web page dedicated to how you should act at one of their concerts. One portion, entitled “During the Performance”, states:

Once a concert is underway, we request that you do not talk, whisper, sing, hum, move personal belongings and turn your cell phone to silent (not vibrate). These protocols will ensure that you, other patrons, and the performers enjoy the full benefits of the performance. Patrons should also refrain from entering and exiting the hall while a performance is in progress. Ushers are stationed at entrances and exits. If you must leave your seat, please proceed quickly and quietly to the nearest door, or ask the nearest usher for assistance. (“Etiquette,” n.d.).

This statement is quite similar to the earlier notice that the New York Philharmonic put into one of their early annual reports cited earlier in this chapter. Later on this same page, under “Applause”, it reads: “Please applaud only at the close of a full piece of music. The program page, which lists individual movements of longer compositions, and the program notes can help you follow the orchestra's progress through each piece and determine the appropriate moments to applaud. Thank you in advance for your cooperation” (“Etiquette”, n.d.). While these could be helpful for new audience members, it does pose the question of if this may keep them from attending at all as it could re-enforce the idea that an orchestra concert might be too elite.

The Symphony's Role in the Community

The idea that an orchestra should be building links to engage their community has been progressing throughout the years, and has taken shape in programming and new models of performances (Kaiser, 2015). Whereas orchestras used to sustain on a few wealthy founders, they now must work with foundations, corporations and individual donors – many of which are members of their community. If there is no relationship or bond with these constituents than why would they choose to support an orchestra? As a nonprofit, symphony orchestras are in existence to serve their community and, in effect, are there to fill a gap in the public provision of services. Many are looking to serve their community in a variety of ways. Some help with the cuts in music education by providing classes, or youth orchestra opportunities. Others provide free concerts or perform in more accessible places. Many orchestras are addressing the needs of their community and building programs outside of their performances. These will be thoroughly explored throughout the entirety of this study.

CHAPTER THREE:

DISTINGUISHING THE DIFFERENCE BETWEEN AUDIENCE DEVELOPMENT AND DIVERSE AND INCLUSIVE PROGRAMMING

3.1 Introduction

To counter many of the issues that symphony orchestras are facing, they are looking for ways to change their image within the community and to be more welcoming to a variety of new audience members. There are numerous ways that orchestras approach this, but they mostly fall into three categories: audience development; providing programming that promotes diversity, equity and inclusion; and community engagement. *Audience development* encompasses the various ways that an orchestra, and other types of performing arts organizations, are trying to attract new patrons. Strategies can include marketing techniques, ticket sales, programming, programs for new audience members and more. Even though ticket sales only account for a third of the average orchestra's total revenue, they are a performing group and performances and audience development will always be important and relevant. As we will discuss, audience development often leads away from strictly focusing on concert attendance and can move into the realm of community engagement.

Another important area of focus is *diversity, equity and inclusion* (DEI). Symphony orchestras should be evaluating their relationship with the community, and programming that they may or may not be offering that could benefit a higher percentage of the population in this community. This initiative is one that is being adopted by not only symphony orchestras and other performing arts genres, but the arts as a whole. It is important to create an environment that is welcome to everyone. While there is not a lot of literature on best practices within the symphony orchestra, there are examples within the broader performing arts along with the arts

and culture sector that will be explored. Efforts in audience development and cultivating a diverse, equitable and inclusive audience both tie into how an orchestra engages with their community. These initiatives influence the programming initiatives that an orchestra may be able to offer.

Though these two terms often go hand in hand, it is important to understand that they are two separate ideas. Audience development is essentially that: developing an audience. It does not imply what type of audience, or who is in the audience, merely that it is ways in which to develop a general audience. Diversity, equity and inclusion is looking into ways to make programming more accessible, appealing and available for the community.

3.2 Audience Development

This study defines *audience development* as methods of encouraging new audience members and retaining current audience members to attend performing arts related events. For the purpose of this study, these events will be in reference to symphony concerts and programs. Within the performing arts, audience development is a hot topic as a large portion of these organizations' revenue lies in ticket sales. There are different ways in which performing arts organizations, and symphonies specifically, work to develop their audience. However, there is a fine line for these orchestras between keeping dedicated patrons happy with beloved classical staples, and programming new and/or relatable works for those that have no interest in attending a concert comprised of only classical music that they may be unfamiliar with. There is also the underlying issue of "high-brow" entertainment, which implies a certain class of people attend symphony concerts and also discourages new people from attending because they do not feel comfortable with the proper etiquette for attending a professional orchestra concert.

Symphony orchestras, and the performing arts in general, are looking into ways to encourage these new patrons to attend concerts and to make them feel comfortable. Some organizations are finding ways of programming for these new audiences, while others are maintaining the same repertoire but creating opportunities for these new patrons to feel comfortable in a new environment. This chapter also explores marketing and pricing strategies that may be used to attract other populations.

The symphony orchestra has often been viewed as a leisure activity of the elite, and although this has changed drastically over time, this misconception still lingers. It is an ongoing battle to change this perception, and adjust community and audience standards. It can also be a challenge within the artistic views of the orchestra itself. Should a symphony orchestra simply be a curator of classical music and preserve these traditions and works of art, or should they be moving away from the classics that are no longer appreciated in the same way by the general public and move into genres that the audience might be more familiar with. Finding this balance is quite difficult, and there are a variety of ways in which it has been approached. McCarthy and Jinnett (2001) remind us that:

- They can diversify participation by attracting different kinds of people than they already attract
- They can broaden participation by attracting more people
- They can deepen participation by increasing their current participants' levels of involvement (p. 32).

These three methods for developing an audience are extremely important and should be referred to when performing art administrators are looking to build and diversify participation. It seems that many organizations hope to attract new people to their organization with entirely new programming and to tackle the percentage of people that are not currently attending their

concerts. However, organizations should remember that there are many other ways to develop an audience, least of which begins with the audience currently attending programs.

3.3 Management Roles and Internal Issues

Determining a course of action begins internally and this is often the most difficult part. The organization in its entirety needs to be open to new ideas regarding their audience and how to increase participation. Often there are issues that may arise with built up tension between artistic staff and administrative staff, usually due to financial constraints in regard to programming (Gore, 2009). Gore (2009) explains that “inherent tension in a symphony orchestra is defined here as a natural dichotomy that exists between the artistic administration and management in terms of balancing artistic desires with financial necessities” (p. 29).

It could be argued that this financial strain and “natural dichotomy” within a symphony orchestra might actually be used to look into other, unique ways of programming. These ideas could attract a new audience resulting in a new revenue trail that could in turn fund original programmatic ideas. Parker (2012) brings up another side of this argument, and states that it is important for artistic staff to be consulted and included among administrative leaders as they will have another insight as to ways that they could engage their audience. With that being said, organizations should not be completely reliant on their artistic director to the point that they let them make every programmatic decision, as this could ultimately have negative results (Ravanas, 2008).

The Chicago Symphony Orchestra is an excellent example of this. Although they had many conductors that had influenced the reputation of this orchestra, they had two artistic directors that had the most impact – one positive, and one negative (Ravanas, 2008). George

Solti worked with the orchestra for 22 years and defined their sound from 1969 to 1991 and brought the symphony to international fame. His successor, Daniel Barenboim, is described as having an “aloofness, arrogance and unabashedly high-brow attitude” (Ravanas, 2008, p. 70). He had a temper, often took on more than he could accomplish, and would cancel performances and engagements. During Solti’s time with the orchestra, seats would sell out immediately and performances were considered a luxury, thus administrators charged top dollar for tickets. However, when Barenboim took over, demand for tickets went down, the orchestra reacted by raising prices to make up the difference, which in turn resulted in even less ticket sales. Administration had to come together and work with artistic staff to develop new options to develop their audience again as a result of these issues (Ravanas, 2008).

Everyone within the organization (Executive Director, Artistic Director, Board, musicians, etc.) needs to agree that the audience they are hoping to serve aligns with their mission and goals for the organization (Harlow, 2014). They need to be on board to do the market research, spend time with their audience and listen to what they need from the organization (Parker, 2012). To be successful organizations need to have an “all hands on deck” (Parker, 2012, p. 9) approach, and should be sure to include, and rely, on all staff members. Parker (2012) adds that “cultivating a ‘we’re-all-in-this-together’ mentality requires work” (p. 10); however, it builds a higher rapport and trust among the staff and various departments.

These initiatives need to be embraced and integrated into every department and throughout the organization, rather than being a separate entity only followed by a few employees (Harlow, Alfieri, Dalton, & Field, 2011). Having staff on the same page means that you have people available at events to mingle with customers and hear and see their feedback or any issues that may arise (Parker, 2012). The organization must change their mindset from elitist

to welcoming, and to make changes to their organization to make the customer feel both appreciated and necessary (Ravanas, 2008). This could be as simple as re-doing the organization's website to become more user friendly to offering refunds to purchased tickets – customer experience is important now more than ever (Ravanas, 2008).

Parker (2012) also adds that: “For organizations to build and sustain audience participation successfully, they must also foster what organizational management gurus like to call “a culture of learning” – an atmosphere that encourages employees to assess their work, use disagreement effectively, innovate at the boundaries of departments and take risks” (p. 11). Organizations cannot be afraid to take risks with programming, but should also be able to take a step back and accept feedback and make necessary changes. Often, especially in the arts and even the broader nonprofit sector, there does not seem to be room to try something new and fail. This could be because of finances, the mission, or any number of other reasons. However, there should be a margin for error when it comes to programming and developing an audience, and the entire organization should be accepting of this.

3.4 Marketing and the Effect of Ticket Sales

Marketing towards these intended audiences is another form of audience development. Making these concerts and events seem like something they would want to take part in is an important aspect. Bhargava (2012) discusses eight different ways that an art organization can come across as more “human” to its constituents, and focuses on four areas: truth, people, story and personality. He argues that “the fact you already know is that people follow their passions. So the usual advice you might see is to just focus on getting more people to be passionate about what you DO ... and you'll see all the benefits you want. The only problem is that is notoriously

hard to do” (Bhargava, 2012, p. 3).

Those that are already attending performances have a passion for the symphony. If everyone else already had this passion than there would not be an issue with concert attendance and/or ticket sales. Rather than promote this passion for an art form he suggests that organizations become more relatable¹. He encourages organizations to give a “backstage” view of the organization and to not be afraid to show the organization’s mistakes to the public (he describes this as the outtakes), to build a connection between audience and your individual musicians or an outside influencer (Bhargava, 2012). He also discusses the importance of embracing your history, and what makes your organization unique (Bhargava, 2012).

However, another barrier that faces potential audience members and symphony orchestras are ticket prices and subscription sales. Ravanas (2008) writes that “Matching price and value has always been difficult, particularly for arts organizations” (p. 71), and adds that: “The aesthetic value of a cultural product is eminently personal and subjective” (p. 71). It’s a balancing act when it comes to ticket pricing, as significant price increase will deter those with less financial means however some patrons will only pay for an expensive ticket and looks down on discounts (Ravanas, 2008). It can also be argued that orchestras that spend more money on marketing have a higher attendance, and Pompe, Tamburri and Munn (2013) also add that price of tickets had less to do with attendance than what was actually being performed.

Peter Boal of Pacific Northwest Ballet argues that inclusivity should be in all areas of performing arts: “Not just the ramps for the wheelchairs, but also the prices, so that everybody feels that the ballet is for them” (Harlow & Heywood, 2015, p. 10). Many orchestras offer student or youth pricing to allow for young people to attend their concerts. Some organizations,

¹ Something familiar, or perhaps more recognizable.

like the Seattle Symphony, offer shorter concerts and reduced rates to attract new attendants. Chicago Symphony also changed their pricing to lower the least expensive tickets' pricing and raise the most expensive (Ravanas, 2008).

These examples are all for single ticket pricing, which is an area that many performing arts organizations struggle with. They are used to selling a subscription package, however people are busy and can't, or won't, commit to a long-term purchase. This then affects programming, and pushes these organizations to be creative in the way that they sell their performances. Steppenwolf Theatre identified the decline in subscription sales and decided to tackle it head on by embracing the idea of repeat single-ticket buyers: they made it their goal to develop deep relationships with the single-ticket buyers instead of merely a one-time transactional interaction. They set out to engage these audience members by listening to them, continuing the conversation outside of the stage area, with online content and much more. It is important understand that engaging and building relationships is on-going and not just a one-time initiative (Harlow et al., 2011).

3.5 The Positives and Negatives of Programming Choices

There is a trend in what orchestras usually program, a 2012-13 Repertoire Report by the League of American Orchestras showed that the most performed compositions were by: Wolfgang Amadeus Mozart, Ludwig van Beethoven, Pyotr Ilyich Tchaikovsky and Johannes Brahms ("Orchestra Repertoire Report - ORR, 2012-2013", n.d.). This is problematic for a number of reasons: older audience members get used to this programming, the monotony does not attract new audience members, and it is not promoting new literature. However, orchestras that perform more of these standard works tend to have a higher attendance than those

performing new works (Pompe et al., 2013). Attendance also increases when well-known works or artists are being showcased, for example Yo-Yo Ma as a guest artist, or a performance of Handel's *Messiah* (Pompe et al., 2013). These programming choices typically attract the older, and more traditional, symphony audience. These patrons are considered life-long learners, appreciate this traditional repertoire and do not typically like contemporary work or a change in program or musicians (Pitts & Spencer, 2008).

Orchestras need to look into ways to keep these patrons happy while also programming for new audience attendance. Chicago Symphony addresses both of these issues by launching their Beyond the Score, which is a Sunday afternoon series that documents the history of the compositions they are performing featuring a narrator, actors and followed by a performance (Ravanas, 2008). This was the best of both worlds as it attracted a large number of new audience members by teaching them about the music, and also allowing long-term audience members to appreciate their traditional favorites while also learning some background (Ravanas, 2008).

Orchestras now are now creating more options to attract a variety of audience members. They do this by featuring pops concerts, playing the soundtrack to a movie while the film plays on stage, featuring famous actors, comedians or popular non-classical musicians. These are a good way to attract single-ticket or one-time visits, but unless they offer a subscription option for these specific concerts it is hard to see these patrons return. Pompe et al. (2013) also adds that symphony orchestras that play a lot of pops concerts typically see a decline in concerts that feature traditional compositions because the orchestra is not viewed as one that performs classical masterworks. This is another fine line that orchestras face when it comes to developing their audience.

3.6 Opportunities for New Audience Members and Customer Experience

Some performing art organizations are changing what, or how, they perform to encourage audience development, but many are maintaining their programming traditions and finding ways to make the new members feel more comfortable with this new experience. There are many assumptions that those who have not attended a concert before may have: that the symphony is formal, intense, the musicians should be technically and musically precise, they won't be able to connect with what they are listening to, they won't fit in, or they aren't specifically knowledgeable about classical music than they won't appreciate the experience (Dobson & Pitts, 2011).

While one method is to program specifically for these new audience members, another option is to make them feel included and develop opportunities for them to not only learn more about classical music but about the culture of the symphony. The *Talking Theatre* project incorporates the concept of a Post-Performance Audience Reception which is essentially what this project entails. The project consisted of 14 regional performing art centers, and using programs within their season they chose 24 participants for each region and they must have the following qualifications: be in the age range of 18-25, identify as non-attenders, lived in the local area and had not attended their local performing art center before. These participants received free tickets to their first performance, reduced tickets to their second and an incentive to their third. The reception talks are evaluated and used to further audience development. Two theaters in Australia have excellent examples of performing their usual program but working with new audience members to hear what they have to say and to provide opportunities to make them feel comfortable (Scollen, 2008).

The Seattle Symphony has taken advantage of their booming population of young professionals by creating a series which they call “Untuxed” (formerly known as Rush Hours). This concert series uses pieces that are also being played during their “Masterworks” series, but the concert is short (often less than an hour), with no intermission, and the orchestra wears their street clothes. They encourage the audience to dress casual, and provide insight and background on each piece. They previously would bring the audience on stage to experience a behind-the-scenes tour prior to the concert (Dobrzynski, 2017).

While reaching new and diverse population might be the intent, there is no way to actually understand your organization’s effectiveness or need other than to hear from your intended audience. First you must identify who you are trying to attract, and what may be the reason for their lack of awareness. This can be done various ways: survey instruments, focus groups, ticket sale analysis, one-on-one interviews, etc. The point is that you must understand the misgivings of these potential audience members before you attempt to earn their business. Many performing arts organizations, not just orchestras, are facing similar issues and have developed unique ways to develop, and communicate to, their audience (Harlow, 2014).

Steppenwolf Theatre Company in Chicago began to notice a decline in subscription ticket sales, though they had a high base and renewal rate they were not seeing many new subscriptions. As mentioned previously, this is not uncommon in ticket sale trends, so instead of trying to break the trend they developed a new program: they encouraged single ticket purchases which would then, in theory, turn into subscriptions. Pacific Northwest Ballet (PNB) also noticed a common trend among their audience members: a decline in teen and young adults (Harlow, 2014). They conducted focus groups involving young people to find out why they were not coming to their performances and PNB discovered that they thought of the ballet as

“elitist, boring, and stuffy” (Harlow, 2014, p. 30). Many of them did not feel that they would appreciate the performance or would not feel like they would belong (Harlow, 2014), which is similar to many of the concerns that people associate with the symphony.

3.7 Diversity, Equity and Inclusion

This is an important topic in all sectors, and the arts is not an exception. However, in regards to the symphony orchestra, there is not a lot of literature on the subject other than within the context of employment and management. There are many organizations within the performing arts sector that have issued diversity, equity and inclusion statements and some of these will be compared and analyzed. Though some may not be specifically from a symphony orchestra, the concepts and initiatives used within other organizations’ statements can be helpful with establishing similar initiatives focused on the constituents of an orchestra.

3.8 What is Diversity, Equity and Inclusion in the Arts?

Kapila, Hines and Searby (2016) provide the following definitions for diversity equity and inclusion within the nonprofit sector using language D5 Coalition, Racial Equity Tools Glossary, and UC Berkeley:

Diversity includes all the ways in which people differ, encompassing the different characteristics that make one individual or group different from another. While diversity is often used in reference to race, ethnicity, and gender, we embrace a broader definition of diversity that also includes age, national origin, religion, disability, sexual orientation, socioeconomic status, education, marital status, language, and physical appearance. Our definition also includes diversity of thought: ideas, perspectives, and values. We also recognize that individuals affiliate with multiple identities.

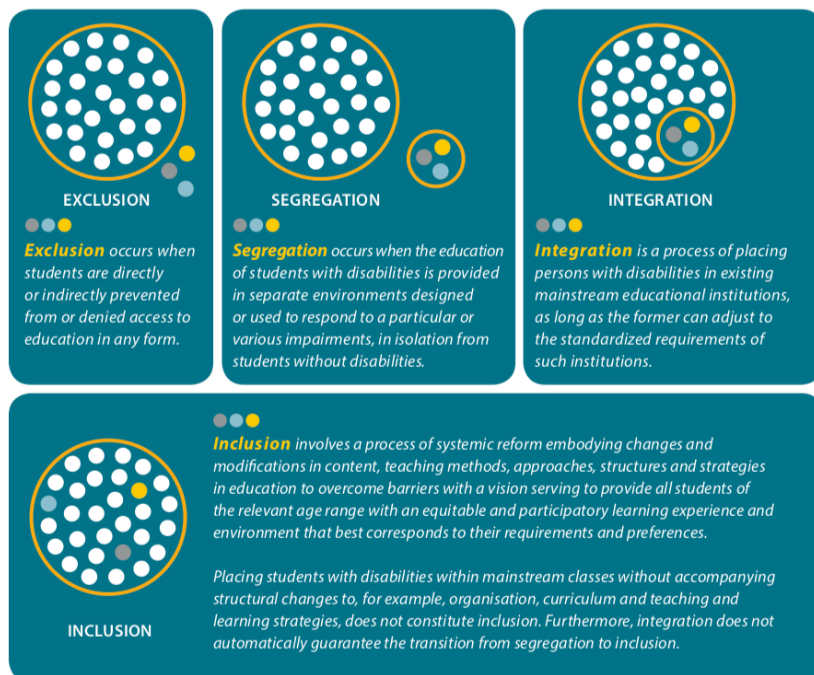
Equity is the fair treatment, access, opportunity, and advancement for all people, while at the same time striving to identify and eliminate barriers that have prevented the full participation of some groups. Improving equity involves increasing justice and fairness within the procedures and processes of institutions or systems, as well as in their distribution of resources. Tackling equity issues requires an understanding of the root causes of outcome disparities within our society.

Inclusion is the act of creating environments in which any individual or group can be and feel welcomed, respected, supported, and valued to fully participate. An inclusive and welcoming climate embraces differences and offers respect in words and actions for all people. It's important to note that while an inclusive group is by definition diverse, a diverse group isn't always inclusive. Increasingly, recognition of unconscious or 'implicit bias' helps organizations to be deliberate about addressing issues of inclusivity. (Kapila et al, 2016).

Another excellent example can be seen below in Figure 3.1. Though this example is specific to inclusion regarding individuals with disabilities, it is an excellent reference for answering the question of "what is inclusion?" The infographic highlights the difference between exclusion, segregation, integration and inclusion.

What is inclusion?

Educational environments for students with disabilities range from a complete denial of formal educational services to equal participation in all aspects of the education system. For this paper, we describe the educational experiences of students with disabilities using the following four categories:



Source: United Nations Committee on the Rights of Persons with Disabilities General Comment No. 4 (<http://www.ohchr.org/Documents/HRBodies/CRPD/GC/RighttoEducation/CRPD-C-GC-4.doc>)

Figure 3.1 – What is Inclusion? (Hehir, T., Grindal, T., Freeman, B., Lamoreau, R., Borquaye, Y., & Burke, S., 2016, p. 3). Source: United Nations Committee on the Rights of Persons with Disabilities General Comment No. 4 (<http://www.ohchr.org/Documents/HRBodies/CRPD/GC/RighttoEducation/CRPD-C-GC-4.doc>)

Creating an environment that promotes diversity, equity and inclusion is not only important but necessary for relevance. Nonprofits of all kinds are created of and for the community to which it serves, so if they are not striving towards programs that serve their entire community than they are doing something wrong. Understanding what diversity, equity and inclusion is and how each should be defined within specific organizations is also important. The above definitions explain what each word means, but the important aspect of this is how a symphony orchestra will define diversity, equity and inclusion that feels appropriate for their community, organization and programming options.

One of the pioneers, and continued role models, of diversity and inclusion is the Oregon Shakespeare Festival (OSF) whose “Audience Development Manifesto” has become a notable, and important, document that many organizations use as a reference. The Manifesto reads: “We acknowledge that as an institution we have created and continue to reinforce barriers that exclude people who are not part of our core audience, and we commit to a constant examination and dismantling of such barriers” (“Manifesto”, 2010, p. 1). Understanding that there is a need for change and stepping back to evaluate your organization is the first step in providing more diverse opportunities within an organization’s community.

As mentioned before, having the entire organization involved in audience development is extremely important, and this is especially true when it comes to diversity, equity and inclusion. “We believe that we will most effectively diversify our audience when every company member in every department acts as an ambassador in inviting new audiences. We encourage and support each company member to be an enthusiastic advocate with family, friends, neighbors, social contacts, and even perfect strangers. We recognize and honor the fact that audience development initiatives will be a part of the fabric of all of our workloads” (“Manifesto”, 2010, p. 1).

Everyone involved with the organization needs to be committed to making this change, or these initiatives will only be good ideas that are not actually being implemented.

The Oregon Shakespeare Festival document continues to highlight ways in which they will commit to various populations that may not have immediate access to their organization, and how they will work to be more inclusive. Four areas of focus include socio-economic background, disability, age, and race/ethnicity. For each area of focus, they describe how they will work towards increasing diversity and inclusion, and why it is important for their organization. They also list strategies for each group (i.e. lower ticket prices, programs for young adults, performing works by people of varying races and ethnicities, and providing service for those with disabilities).

Looking into symphony orchestras specifically, the League of American Orchestras is an advocate for the continued improvement of diversity within symphony orchestras, writing that: “For orchestras to remain vital, they must be authentically diverse institutions—onstage, on staff, and in their governance. It is essential that orchestras in the 21st century become organizations that contribute and connect to the overall quality of life of our diverse communities” (“Diversity Statement”, 2012). The League’s website also provides their commitment to furthering this initiative:

Achieving diversity in our organization and our field requires commitment from the leadership at all levels. This commitment must extend over time, with an understanding that achieving diversity is an ongoing process. Therefore the League pledges to:

- Promote diversity within our board and staff
- Promote greater understanding of, and respect for, diversity in our member orchestras
- Help orchestras advance their work in the area of diversity and inclusion, including audience, orchestra and staff personnel, repertoire, young artists, boards, and governance practice. (“Diversity Statement”, 2012).

The League of American Orchestras is the center of research and advocacy within the orchestral sector. It is important for them to have a publicized diversity statement, which should in turn push orchestras throughout the country to develop one of their own. They also provide conferences, reports and speakers to promote both awareness and the importance of diversity, equity and inclusion within the arts. Many organizations will not only work towards building a more diverse audience, but will also look into creating programming separate from their performances to better assist the needs of their community. This will be explored more in future chapters of this master's research document.

3.9 Funding and Access vs. Excellence

Many organizations are beginning to develop programs to promote diversity, equity and inclusion (DEI) within their community, but some are developing these for the funding and do not put a lot of focus into the program itself. As this is an important topic, there is a growing amount of funding available to promote access to art and, more specifically, within underserved areas and populations. There has been a longstanding excellence versus access debate that began with the National Endowment for the Arts (NEA) funding priorities after the culture wars in the 1980s and 1990s (McNeely & Shockley, 2006). After facing backlash for funding priorities that may not align with values associated with government spending, the NEA needed to shift their model (McNeely & Shockley, 2006). They turned from funding individuals to programs within an organization, and it became difficult to define excellence with the arts so they chose to promote access instead (McNeely & Shockley, 2006). This has continued into today's funding priorities, and current funding is still mostly focused on promoting access to the arts. Two of

their granting programs, Art Works and Challenge America, focus on bringing access to art not only to the community as a whole but specifically to under-represented populations.

The Art Works grant “supports public engagement with, and access to, various forms of excellent art across the nation, the creation of art that meets the highest standards of excellence, learning in the arts at all stages of life, and the integration of the arts into the fabric of community life. Projects may be large or small, existing or new, and may take place in any part of the nation’s 50 states, the District of Columbia, and U.S. territories” (Ball, 2018, p. 5).

Though similar, the Challenge America grants “enable organizations, particularly those that are small or mid-sized, to extend the reach of the arts to underserved populations - those whose opportunities to experience the arts are limited by geography, ethnicity, economics, or disability” (Ball, 2018, p. 6). Both of these grants are focused on giving access to art to communities and their various populations. Excellence is still important, though hard to define. However, these funding priorities are available and should be taken advantage of. There are many populations that could use help and art is one way to do that. The purpose of nonprofits is to fill a gap, and art organizations are no exception.

3.10 Conclusion

As we move from issues that professional symphony orchestras are currently facing into ways in which they are working to improve certain areas, there seems to be a common theme: the need to diversify and build an audience among the community that the orchestra serves. There are many ways that an orchestra can develop their audience base, but it is equally important to understand the needs of their community and to also focus on offering diverse, equal and inclusive options. Working from these foundational concepts, symphony orchestras have created

programs specifically to fit the needs of their community. Often this will involve providing education and youth programs to assist with music education being cut from public schools. Other options include performances outside of the concert hall, allowing more community members to attend – maybe they're free or maybe they are in a more convenient and less intimidating space.

Many orchestras are developing programs completely separate from their performances to better assist their community, this could be events that work with families, or young professionals after a long work day, and often they are focusing on a critical need or an under-represented population. These take the concepts of audience development and combine them with the diversity, equity and inclusion initiative to evolve a symphony orchestra into a nonprofit organization that is serving their community.

CHAPTER FOUR:

THE VARIOUS WAYS AN ORCHESTRA CAN ENGAGE WITH ITS COMMUNITY

4.1 Community Engagement and the Symphony Orchestra

This study has discussed issues that symphony orchestras are currently facing, and the importance of both audience development and the incorporation of diversity, equity and inclusion into their culture. What merges these concepts is how an orchestra engages with their community. We will explore what this means and how a symphony orchestra might choose to engage, but it is important to understand how even this idea has shifted, and continues to shift, within the sector. The community engagement initiative might not be new, but has been growing into a more prominent initiative among symphony orchestras. For a long time, this was known as *community outreach*, and only recently has changed into *community engagement*. Although some orchestras still refer to these programs as a form of outreach, the change to engagement can also be attributed to the shift in symphony image. As discussed in previous chapters, symphonies have long been seen as leisure of the elite, and the idea of outreach feeds into this as it implies that the symphony is still above everyone else. Moving towards an engagement approach changes the image to one of collaboration and community involvement.

There are usually three main areas in which symphonies are engaging with their community. The two most popular include education and/or youth programs, and community performances; the third involves their engagement with under-represented populations. It is rare to find a professional orchestra of any size that does not have some sort of educational component, or performance available to their community that is often free and/or located outside of their main concert hall. Ways in which these orchestras are developing new programs to

include community participation, and more specifically under-represented populations of their community, are not always as common or advertised as widely. Often they are not listed through the organization's website, but may be included in the newspaper, a blog or through another organization that they may be partnered with. The following sections will explore these three areas of engagement in more detail, while providing a context within symphonies around the United States (and sometimes internationally) along with important examples. While this study will not cover every program currently available, it will highlight trends among professional symphony orchestras and some examples of unique and innovative programming.

4.2 Education, Family and Youth Programs

As was mentioned in chapter two, there has been a decline in music education which has ultimately affected interest and relevance in all of the performing arts. Many symphonies are filling this gap by offering a variety of educational programming for their community. This section will focus not only educational programming, but also programs that focus on youth and families. While there are many similarities, this is an important aspect of what symphony orchestras are doing to serve a need in their communities. It should also be noted that some of these programs may also be viewed as a way in which an under-represented population is being served, as many of these programs focus on at-risk youth, minorities and those coming from low-income families. However, for the purpose of this study, all educational programming will be focused on in this section as it is one of the most common forms of engagement.

4.3 El Sistema

El Sistema is a Venezuelan state-funded organization that was created in 1975 by José Antonio Abreu based on “the idea of systematizing music education and promoting the collective practice of music through symphony orchestras and chorus as a means of social organization and communitarian development” (“What is El Sistema?”, n.d.). El Sistema is composed of many values and ideals used to guide its programs: accessibility, regularity and intensity of training, ensemble practice, pursuit of artistic quality and reward of excellence (Majno, 2012). It is also important to understand that El Sistema was developed to serve youth living in poverty to provide them with an alternative to a life of gangs, drugs and violence (Majno, 2012). El Sistema works under the motto “to play and fight” (Majno, 2012, p. 57), and the El Sistema website explains that: “It reflects the firmness of purpose and perseverance of the Venezuelan musicians who, from generation to generation, have built a productive life through music”.

Majno (2012) quotes the founder, José Antonio Abreu, as saying: “Culture of the poor should not mean poor culture” (p. 57). This program was groundbreaking in that it was giving youth of humble means something meaningful, productive and safe to do with their time. The success of this program was later replicated all over the world, including in the United States. The League of America Orchestras lists El Sistema inspired programs throughout the United States, and there is now a United States based El Sistema nonprofit which provides resources for local programs and educators.

An example of El Sistema in the United States is the Youth Orchestra of Los Angeles (YOLA), a program that was developed through the Los Angeles Philharmonic: “the LA Phil and its community partners provide free instruments, intensive music training, and academic support to students from underserved neighborhoods, empowering them to become vital citizens,

leaders, and agents of change” (“YOLA,” n.d.). The first orchestra was established in 2007 and has now grown to four different locations, seven orchestras, a variety of after school classes, an average of 13 hours per week at each location and serving close to 1,000 students (“YOLA,” n.d.). These programs are exemplified among other El Sistema based programs in the country, and has been used to combat ethnic segregation, challenges facing at-risk youth and social justice (Johnson, 2013).

4.4 Programs of Carnegie Hall

Carnegie Hall is one of the most well-known concert venues in the United States, if not the world. Aside from being a world-renowned concert hall, Carnegie Hall also prioritizes many community and educational programs that are available to symphony orchestras throughout the United States. Clive Gillenson, Carnegie Hall’s Executive and Artist Director, explains “We believe our mission is not to serve our institution, but for our institution to serve people” (p. 43). Carnegie Hall offers programming for a variety of ages and skill levels. The *Musical Explorers* program is sponsored by Disney and teaches children in grades Kindergarten through 2nd grade singing and listening skills, how to reflect on their community and to learn songs from different cultures (Carnegie Brochure). *PlayUSA* works with low-income and underserved children from kindergarten through seniors in high school across the country to offer music education. Participating organizations receive funding, training, professional development and guidance from Carnegie Hall staff. Other projects include *Lullaby Project* (this will be discussed later in this chapter), *National Youth Orchestra* and related projects, masterclasses, social justice programs, and more (Carnegie Brochure). Figure 4.1, from the Carnegie Hall 2018-2019

Education and Social Impact Programs Brochure, shows where some of their education programs are being offered throughout the country.

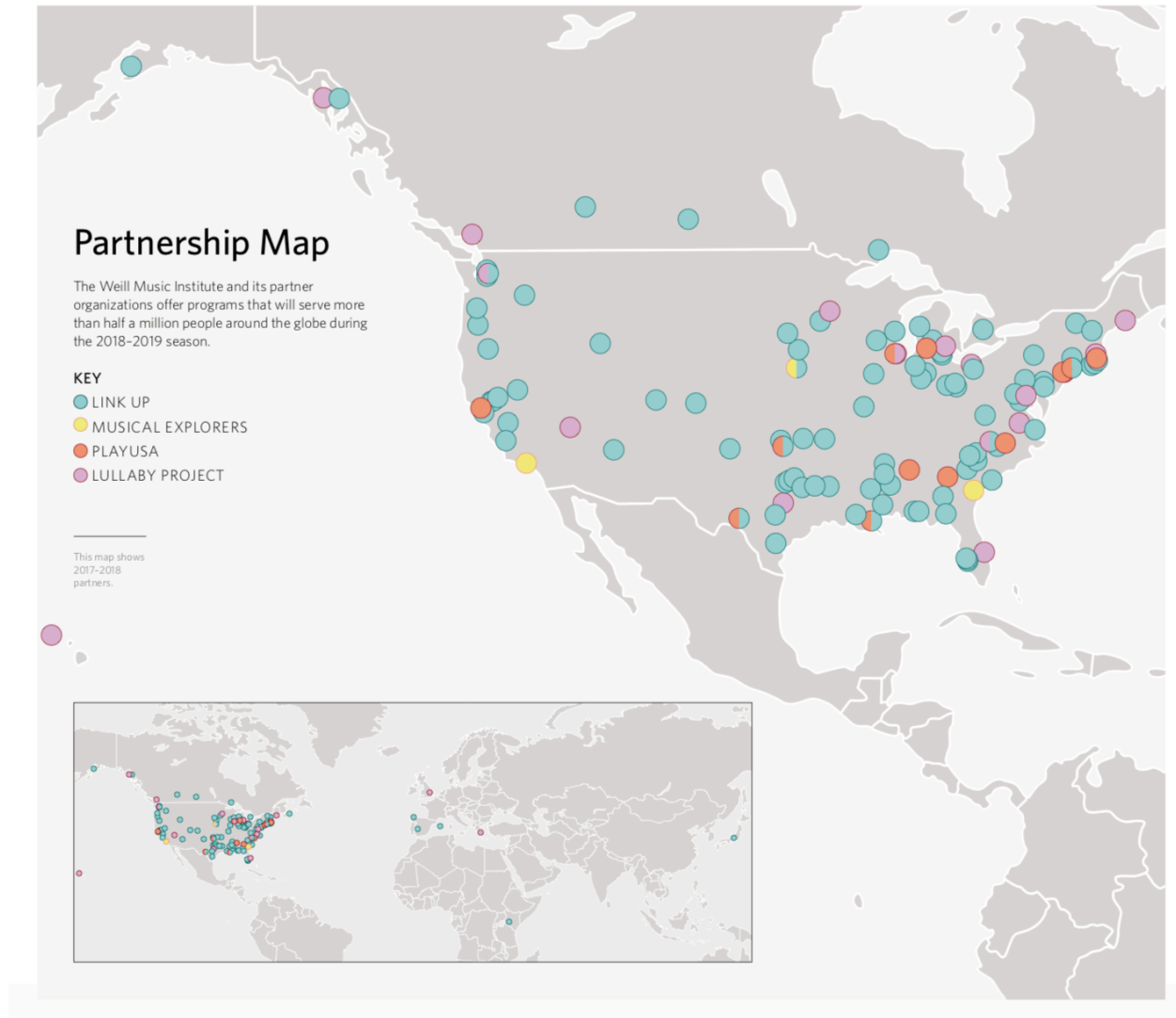


Figure 4.1 – Participating Locations (Carnegie Brochure, pp. 10-11)

Carnegie Hall's longest running program is *Link Up* which is now in its 33rd season, and they have teamed up with over 100 orchestras in the United States and internationally, reach over 400,000 students and teacher and presented 340 concerts (Rosenburg, 2017). This program reaches students in 3rd-5th grade, and usually takes about three months for each program

(Rosenburg, 2017?). “Four Link Up programs are available that focus on specific musical areas: The Orchestra Sings (melody), The Orchestra Moves (the movement of musical motifs), The Orchestra Rocks (rhythmic pulse), and The Orchestra Swings (the intersection of jazz and classical). The orchestras are responsible for funding the Link Up activities, with assistance from local schools, foundations, and cultural institutions, while Carnegie Hall provides a wealth of support including free copies of student and teacher guides, concert scripts, visuals, and annotated scores” (Rosenburg, 2017, p. 40).

4.5 An Overview of Educational, Family and Youth Programs

As has been discussed throughout this past section, there are a variety of ways that symphony orchestras have developed programming to fill the music education gap in their communities and to also incorporate programs for youth and families. Youth orchestras are an option that many professional symphonies provide for their community, although not all are based on El Sistema. With that being said, not every professional symphony has the budget or capacity to offer this option. Instead they may offer master classes with visiting guest artists, residencies within local schools, the opportunity for young musicians to play next to a professional musician on stage, private lessons, and other options.

Many orchestras offer music education programming for youth and families. Instrument Petting Zoos seem to be a popular option among orchestras of varying sizes and budgets, and they will usually offer young children a variety of instruments to try. Volunteers instruct the children on how to make a noise on the instrument, and often it the first time many of these youth have even held an instrument. These may be at schools, at festivals, in the park, at concerts – this program is quite portable and is easy to bring to many locations. Family Concert

series are also quite popular: these are usually matinees, admission is free or extremely reduced, and are child-themed. Chicago Symphony Orchestra offers *Once Upon a Symphony* for children ages 3-5 in collaboration with the Chicago Children's Theater, and it "weaves together live music performed by members of the Chicago Symphony Orchestra, vivid storytelling, sets, costumes and images to create a unique and magical overture to the CSO music experience" ("Once Upon a Symphony," n.d.). *Music for Families* through San Francisco Symphony is similar but changes themes to introduce children and their families to a variety of composers and their compositions, they also offer pre-concert activities ("Music for Families," n.d.).

There a lot creative programming focused towards infants and toddlers to promote music exposure at a young age. Baltimore Symphony Orchestra offers their *Music Box* program which allows babies and toddlers from 6 months to 3 years with families to participate in "highly engaging and interactive performances" and exploratory preconcert activities ("Family," n.d.). Orlando Philharmonic provides an extremely unique option with their Expectant Parents Concert. This concert offers soon-to-be parents the opportunity to learn more about the benefits of music in the baby's development, and combines the music of the Orlando Philharmonic Orchestra with the expertise of former US Surgeon General, Dr. Antonia Novello ("Special Events," n.d.).

4.6 Community Performances and Programming

This area is quite broad, but essentially includes, but is not limited to: performances outside of the concert hall, opportunities for the community to attend concerts for free (based on specific criteria), free community concerts, concerts developed for a certain event or holiday, luncheons or other small events that feature musical conversation, and programs that take place

directly before or after a performance. The most common of these forms of community engagement include a free Concert in the Park; pre- and post-concert talks with a musician, the conductor or guest artist; free or heavily discounted tickets when a patron meets certain criteria (military/veteran, EBT assistance, low-socioeconomic status, senior citizen, student, youth and their family, disabled and their caregiver, etc.); and options for donated tickets to local nonprofits. When an orchestra states that they provide opportunities for their community, often it involves one of the afore mentioned options. However, there are many unique and innovative ways that symphonies are entering their community and engaging with their constituents.

4.7 Neighborhood Concerts

Though similar to Concerts in the Park in the fact that they are free performances available to the community, Neighborhood Concerts are typically offered by orchestras located in heavily, populated urban areas. They will provide concerts within certain neighborhoods of their city, typically in areas where the population may not usually attend a performance within the concert hall. Some examples of these programs include: In Your Neighborhood with the National Symphony Orchestra (Washington, D.C.), William Davidson Neighborhood Concert Series with the Detroit Symphony Orchestras, Free Neighborhood Concerts with The Philadelphia Orchestra, and many more. The Philadelphia Orchestras website states: “By bringing the gift of music into the communities where people live, the Orchestra has worked to break down perceived barriers that might separate it from many people in the community”. This is the essence of community engagement and so important to the survival of this art form.

Some of these programs are just as the title states: free neighborhood concerts. Musicians, often the full orchestra, will perform in neighborhood venues for free. However, the

National Symphony Orchestra (NSO) offers an entire week of instruction, performance and interaction with a specific neighborhood. Their website reads: “Over the course of one week, events include full orchestra concerts, in-school visits, chamber performances, artistic exchange, instrument petting zoos and a range of classes, presented in schools, churches, community centers, night clubs and performing arts venues that reflect the makeup of a participating neighborhood”. Like The Philadelphia Orchestra, NSO also hopes for a continued integration into their community, and add: “Through this community engagement program, the NSO strives to build deeper connections with audiences of all ages, to inspire learning, to create excitement and foster appreciation for live classical music”.

4.8 Performances in Non-Traditional Locations

Yet another way of integrating with the community includes performances in a non-traditional space. Though neighborhood performances and concerts in the park are outside of the concert hall, they are still usually held in an area traditionally used for a performance. The point of these are to engage even more audiences that may not attend a concert in a traditional setting, even though they may be outside of the concert halls. Some unique examples of this include Minnesota Orchestra’s Pint of Music which is now in its third year and partners with local breweries to provide an evening of free music featuring symphony musicians. Colorado Symphony does similar events with their Beethoven & Brews event, and they also have a Summer Porch Party at local distilleries.

4.9 Community Engagement as Audience Development

Tying into the audience development piece in chapter three, there are often times in which community engagement doubles as audience development. While these are programs designed for their community, they are often in the hope that they will increase ticket sales down the line. This is the category where pre- and post- concert talks fall. There is usually something offered with most symphony orchestras, regardless of size and budget, that pertains to this category as they are usually right before or after an existing performance. There are some programs that may appear the week of a concert and in another location as well, but are usually still related to the scheduled performance. Cheyenne Symphony offers “*Tuna Fish and Peanut Butter*” *Classic Conversations* which encourages community members to bring a sack lunch to the library for a conversation with symphony musicians the Friday prior to the upcoming concert.

Many of these programs are geared toward life-long learners, and though not specifically for an older generation, this is often who attends. However, there are interesting examples of symphony orchestras with programming focused on younger audiences, and more specifically young professionals. Again, many of these programs are scheduled around the concerts of these orchestras, and offer young professionals the opportunity to mingle with like-minded people with drinks and discounted tickets. *Urban Overture*, a program of Fargo-Moorehead Symphony Orchestra, is a free monthly event for 20 to 30 year olds who might be interested in a casual concert experience while networking with peers (“FMSymphony,” n.d.). Attendees can enjoy hors d’oeuvres, wine tasting and discounted concert tickets while listening to live music. San Diego Symphony’s *Encore* is a program for patrons 21+ to receive two concert tickets, discounted \$20 tickets and discounts at local restaurants when they join for \$50 (“Encore,” n.d.).

Remix For Young Professionals of the Colorado Symphony is basically a flex subscription pass as members receive four flex vouchers to use for any Classics or Pops concert or any Remix Nights (“Remix,” n.d.). There is a private, pre-concert happy hour and the seating is in the “Remix section” located in the Mezzanine section, and their website encourages mingling among fellow art lovers.

4.10 Programming for Under-Represented Communities

This next section is an overview of unique programs that specifically focus on engaging under-represented populations and helping with a need in their community. These will vary from orchestra to orchestra based on many different factors that include geography, finances, population, and much more. For the purpose of this study, an *under-represented* population will include different groups of people that are either not able to attend a symphony concert, do not have easy access to their local symphony, and/or may be facing other barriers preventing them from involvement. Some examples highlighted in this section, include: those in a hospital (adults and youth), homeless, disabled individuals, people living in a small or rural town, immigrants/refugees, single families, veterans, incarcerated, low-socioeconomic status and senior citizens. This is not an exclusive list and there may be other examples that have not been listed, however these are categories in which most programs can be included.

As mentioned before there may be some slight overlap between areas of programming, but there are many differences between the programming that an orchestra is providing for under-represented populations in their community compared to other programming initiatives. The most overlap will often be in programming offered for youth, families or education; however, there are also similarities among their generic community programming as well. To

clarify, many of the community programs that an orchestra offers are for patrons that may already have access to an orchestra concert, or are planning to attend a concert at some point. These are what were discussed in the previous section. The difference between those programs and programs offered for *under-represented* populations is that those attending these programs do *not* have immediate access to their symphony orchestra. The next section will provide an overview of some of the unique programming that orchestras, mostly within the United States but also abroad, are currently offering to some the prior listed populations.

4.11 Low-Socioeconomic

A commonality among most orchestras is their initiative to help community member of low socioeconomic status with free or discounted tickets. Another popular initiative among orchestras usually lies within their education programming as they will often work with children from low-income families. *Music for Life*, a program of Louisiana Philharmonic Orchestra, combines these ideas with an initiative for youth from low income households by providing these students with a music mentorship program, free tickets to both students and their families, and they partner with programs that work specifically with these underserved youth (“Music for Life,” n.d.).

4.12 Street Symphony and The Lullaby Project

Street Symphony is a nonprofit located in Los Angeles and made up of musicians mostly from both the Los Angeles Philharmonic and L.A. Master Chorale. This organization is partnered with The Midnight Mission and works with residents of Skid Row to provide a variety of programs that range from monthly programs at downtown 12-step programs, to their *Fellows*

program which provides instruction, to their renowned *Messiah Project*. This project was initiated in 2015 and is held annually and is the result of free community workshops held throughout Skid Row, the *Messiah Project* presents commissioned works created for and by member of Skid Row combined with excerpts from Handel's *Messiah*. This program is often referenced and emulated when other symphony orchestras are looking to develop programming for their own community ("Street Symphony," n.d.).

Earlier in this chapter, the Carnegie Hall's education programs were discussed; however, they also offer the *Lullaby Project* for expectant mothers. Like their other programs, they provide materials and support to any orchestras that want to participate in this concert – Figure 4.1 shows participating orchestras. Program participants often include mothers in prisons and shelters, and participating orchestras work with musicians to help these mothers write lullabies for their future baby that are later performed and recorded. Though not widely offered, it is a unique and important program that will hopefully be offered at more orchestras throughout the country.

4.13 Symphonies in Hospitals and Programs for Senior Citizens

This is the most widely offered programming among symphony orchestras. Many of these programs partner with music therapists, hospitals and senior centers to provide healing or comfort through music. They also focus on bringing music to those that may not be able to attend their concerts any longer because of health or medical related issues. These programs often focus on both youth and adults, though some specifically work with elderly patients. While many symphony orchestras typically attract the older generation, this category of engagement is more specifically focusing on senior citizens that are living in a senior or assisted

living center, are suffering from Alzheimer's and/or dementia, or are otherwise unable to attend the symphony orchestra. These programs are different than life-long learning programs which offer opportunities within the community, at concerts or at the concert hall for senior citizens to attend. Many of these programs also intertwine with those offered for patrons in a hospital setting.

The *SymphonyCares* program through St. Louis Symphony presents musicians at children's hospitals, cancer centers and assisted living centers in collaboration with strategic partners that include: Saint Louis University, Siteman Cancer Centers, Maryville University's Music Therapy program and Mercy Children's Hospital ("Symphony Cares," n.d.). "Musicians from the STL Symphony enjoy sharing live music with those unable to attend concerts at Powell Hall due to illness or infirmity" ("Symphony Cares," n.d.). The symphony has been involved in many unique and important research studies and programs: "The results of these studies indicate the positive impact of music on our physical and mental health including, lower blood pressure, improved memory, reduced stress, and even a decrease the intensity of pain we feel" ("Symphony Cares," n.d.). They have quite a few initiatives that include *SymphonyCares for Seniors*, *The Heart Quartet*, and *Symphony Monday at SLU Cancer Center* to name a few.

Pensacola Symphony brings music to the waiting rooms and communal areas of the hospital for children and their families by sending two or more musicians to perform and provide hands-on experience with the instruments, and will visit patients in their hospital rooms if they cannot be in a communal location ("Beyond the Stage," n.d.). Knoxville Symphony Orchestra employs a board certified Music Therapist for their *Music & Wellness* program and musicians working in the program must complete a training through the *Music for Healing and Transition Program* – three of which are Certified Music Practitioners recognized by the National Standards

Board for Therapeutic Musicians (“Music & Wellness,” n.d.). Similar to the Pensacola program, KSO musicians perform in waiting rooms and for patients as they are receiving treatment (“Music & Wellness,” n.d.).

Longwood Symphony Orchestra’s *LSO on Call* is funded by Merck Research Laboratories Boston and launched in 2009 as a single-day city-wide project and involved more than 70 musicians that visited over 24 different hospitals, community health centers, hospices and other types of health care facilities in Massachusetts and reached over 500 patients in their first year (“LSO on Call,” n.d.). They now work with a variety of organizations and their performances help to bring Alzheimer patients closer to their caregivers and family by opening new lines of communication through music (“LSO on Call,” n.d.). Phoenix Symphony offers a similar program with their *B-Sharp Music Wellness, a W.O.N.D.E.R Project* which has a variety of different options that work with hospitals in the area and the homeless population, but also has a large focus in the Alzheimer’s community (“Health & Wellness Programs,” n.d.). The goals for the program include:

- To use music as a catalyst for overall wellness
- To explore the emotional and social benefits of music inherent in group interaction, music-making and memory recall
- To provide a safe, creative outlet for participants, caregivers and family members to engage in music (“Health & Wellness Programs,” n.d.)

They have two programs which focus on Alzheimer’s specifically. *Music and Alzheimer’s Memory Research Initiative* collaborates with Arizona State University and a variety of music therapy organizations, hospitals, care and research facilities to “evaluate(s) the impact of weekly music-based programs on long-term care facilities residents, caregivers, facility staff and Symphony musicians measuring stress levels through the use of quantitative biomarker protocols” (“Health & Wellness Programs,” n.d.). *B-Sharp Music Wellness, a W.O.N.D.E.R.*

Project for Alzheimer's works with individuals that have mild to moderate Alzheimer's Disease or other forms of dementia and their caregivers, and give them the opportunity to attend Friday morning Coffee Concerts that include an exclusive pre-concert chat with an optional backstage tour and lunch with fellow participants at a nearby restaurant ("Health & Wellness Programs," n.d.).

4.14 Rural and Small Town Residents

This may be viewed as community programming or performances as many of these consist of concerts, however many of these communities are located quite from the symphony orchestra and would not be able to attend, or have access to, their concerts: thus, they are an under-represented population. *Common Chords* allows the Minnesota Orchestra to spend a week in a variety of Minnesota cities, and orchestra musicians participate in concerts, coaching and demonstrations in schools, and work with community musicians in both traditional and non-traditional settings that could include gyms, coffee shops or concert halls ("Common Chords," n.d.).

Tucson Symphony Orchestra's *Southern Arizona Residency* collaborates with rural communities to provide music education and performances to the outlying areas in southern Arizona ("SAR"). The program has been around since 1998, and has reached more than 35 rural communities and 7,356 children and adults as far away as 150 miles from Tucson ("Southern Arizona Residency," n.d.). Similarly, the Bozeman Symphony *Field Afar* brings their chamber orchestra to rural communities of Montana "to present free performances and share their musical perspectives" ("Bozeman Symphony Far Afield Program," n.d.).

4.15 Immigrants/Refugees

There are not many programs for immigrants and refugees, though this may begin to change as they *are* under-represented and an important topic in the United States. There will be more on this subject in the following chapter, however there are some important options being offered by a few orchestras around the country. One such initiative is a groundbreaking nonprofit orchestra that consists of refugees from all walks of life. The Refugee Orchestra Project “attempts--through music--to demonstrate the vitally important role that refugees from across the globe have played in our country's culture and society” (“ROP,” n.d.). The project was founded by conductor Lidiya Yankovskaya who is a refugee herself, and wanted to provide an opportunity for refugees in America to come together and express themselves in a neutral setting. She realized that often when people tried to help refugees it came across as pity and she wanted this population to be celebrated (Madonna, 2017).

The Refugee Orchestra Project works in communities of New York City and Washington D.C. and acts as a pickup orchestra as there are no professional musicians and draws instrumentalists and singers from the community that the next concert will be held. The orchestra is made up of refugees and their friends and family of all skill levels so Yankovskaya chooses accessible music that is based on the themes of refugees and could include music involving displacement or exile, music by composers effected by violence or war, and music written by refugees and immigrants. The project is all volunteer-run and any donations go to organizations and programs that directly benefit refugees in the United States (Madonna, 2017).

There are also professional symphony orchestras that have programming specifically for immigrants and refugees in their community. St. Louis Symphony Orchestra uses *Music Without Borders* to connect with the refugee/immigrant population in their communities by offering free

and admission to special performances throughout the year, tailored programs with partners that support refugees in the area, and opportunities for unique fellowship between immigrants/refugees and symphony musicians (“Music Without Borders,” n.d.). Beaverton Symphony Orchestras in Oregon had a free Welcome Week multicultural, *Symphony of Cultures*, concert that partnered with a local church, refugee and immigrant advocacy organizations, cultural groups and other neighborhood associations that featured performances by representatives of different ethnic traditions and symphony musicians (“Symphony Cultures,” n.d.).

Kalamazoo Symphony Orchestra has added on to their education programs to offer *Orchestra Rouh* (rouh means both “hope” and “spirit” in Arabic) which provides regular instruction to youth from Syrian and other refugee families that are taught by teachers fluent in both English and Arabic and includes music from Arabic traditions (“Orchestra Rouh,” n.d.). Lincoln’s Symphony Orchestra partnered with a number of local organizations that work with refugees and immigrants in their area to ensure that any immigrant or refugee family that want to attend their upcoming family concert could do so for free (“Complimentary,” n.d.). Music Director, Edward Polochick, explains that: “We call ourselves *Lincoln’s* Symphony Orchestra with an apostrophe ‘s’ because our goal is to belong to our community. This is just one small way in which we can offer welcome and support to new members of our Lincoln community. Regardless of upbringing, faith, language, or country of origin, we believe that music can speak to the deepest parts of the human experience, and I am honored to share this incredible art form with all members of our community” (“Complimentary,” n.d.).

4.16 Community Members with Disabilities

A missed opportunity among many orchestras is their involvement with the disabled within their community. While they may offer accessibility to the concerts, they are not necessarily programming for those with different needs. There is some development in this area among some orchestras, and will likely continue to increase as the diversity, equity and inclusion initiative becomes adopted by more and more organizations. One option that symphonies are incorporating into their programming are performances for children and adults on the autism spectrum or with sensory-sensitivities. Pittsburgh Symphony works with its Accessibility Advisory Board to produce sensory-friendly concerts that are open to everyone but developed for those with sensory sensitivities (“Sensory-Friendly,” n.d.). These concerts incorporate quite a few modifications to allow for these audience members, and include:

- Online pre-visit materials, such as concert playlists, stories, picture schedules, tip sheets, and videos, that show patrons what they can expect to see and hear at Heinz Hall
- Training for ushers, volunteers, and musicians to help Heinz Hall staff cultivate an especially inclusive environment
- Relaxed rules in the concert hall so that all responses to the music—clapping, singing, vocalizing, moving, dancing, etc.—are welcome at any time
- Partially up house lights
- Free fidgets and earplugs
- A designated quiet space with relaxing activities and a live video feed of the onstage action for patrons who would like to take a break from the pre-concert activities (when available) or performance
- Slight mitigation of sudden, loud sounds
- A family restroom in the Regency Rooms
- When concessions are available, gluten and casein-free options
- For ticketed events, a modified refund policy that allows families to receive 100% of their money back if they purchase tickets and find they are unable to attend the day of the performance. (“Sensory-Friendly,” n.d.).

My DSO concerts offered by Dallas Symphony Orchestra do not change the programming in their concerts, but like Pittsburgh they also offer modifications to accommodate adult and children on the autism spectrum and other disabilities along with their caregivers and families including Quiet Rooms for when the music gets too loud (“My DSO,” n.d.). They also provide

activities similar to many other family programs that include instrument petting zoos, and other engaging activities (“My DSO,” n.d.). The New Jersey Symphony Orchestra offers *NJSO Autism Community Program* which also works with sensory sensitive individuals, but involves a chamber group of specially trained NJSO musicians that brings live music experiences directly to them (“NJSO,” n.d.).

There are more examples internationally that have developed programming to not only include, but designed specifically for individuals with disabilities. The Australian Chamber Orchestra (ACO) is one example, and they “aim to be a leader in providing access and inclusion across our performances and Education and Community Programs, focusing on difference in ability rather than barriers to participation” (“Access Programs,” n.d.). They offer *ACO Move*: “A series of integrated music, sound and movement classes for young adults with disability”; and, *ACA and The MCA*: “ACO musicians and MCA Artist Educators present creative learning opportunities for adults with disability” (“Access Programs,” n.d.).

The Bournemouth Symphony Orchestra in the United Kingdom is an award winning orchestra for their work with dementia patients, but has recently launched the world’s first ensemble run completely by musicians with disabilities (Parr, 2018). The unnamed orchestra will run as a standalone orchestra that performs alongside the Bournemouth Symphony Orchestra, and will be under the direction of disabled conductor, James Rose (Parr, 2018). Rose has cerebral palsy and will conduct the orchestra (composed of musicians with different disabilities) using a baton attached to his head as he does not have use of his arms (“Dorset,” 2018).

4.17 Prison System and Rehabilitation Centers

The Irene Taylor Trust is an organization in London that has developed a variety of programs for youth and adults that have been incarcerated, including both *Music in Prisons* and *Musicians in Residence*. The program is similar to the *Lullaby Project* in that musicians enter correctional facilities, usually for a week, to help inmates form an ensemble and record music which is then made available on CDs (“Music in Prisons,” n.d.). *Music in Prisons* provides inmates with a challenging, enriching and educational project that will hopefully impact the course of their future (“Music in Prisons,” n.d.). Chicago Symphony Orchestra (CSO) works in collaboration with the Irene Taylor Trust since 2013, and staff from the trust traveled to Cook County Juvenile Temporary Detention Centre near Chicago to assist with implementing the *Music in Prisons* model (“Chicago Symphony Orchestra,” n.d.). Sara Lee, Artistic Director for the Irene Taylor Trust, explains:

Wherever you are in the world and whoever you are working with the common denominator is music. In Cook County, it didn’t matter to the young men that they had never been exposed to classical music before, but the palpable excitement of being in the present of some of the best orchestral players in the world, having the opportunity to speak to them, try out instruments and learn as much as they could, was wonderful to witness. (“Chicago Symphony Orchestra,” n.d.).

Riccardo Muti, conductor for the Chicago Symphony Orchestra, adds “The world needs harmony. Music helps us to understand each other’s point of view. This is a wonderful beginning for you and for us” (“Chicago Symphony Orchestra,” n.d.). The Chicago Symphony Orchestras musicians and Riccardo Muti continue to partner with juvenile detention centers and hold residencies in medium and maximum strength prisons for young adults (“Juvenile Justice,” n.d.). Assistant Superintendent of Programs at Illinois Youth Center of Chicago, Michael D. Byrd is appreciative of these programs, explaining that “music is known to heal the soul and creating music heals the mind as well” (“Juvenile Justice,” n.d.).

Both the Kansas City and Philadelphia Orchestras take chamber orchestras into local prisons to perform for inmates. At the Lansing Correctional Facility, the Kansas City Symphony performed to inmates that were described as rapt, eager and polite (Gutierrez, 2015). Attendance to the concert was voluntary, and when the music began “the prisoners fell silent and remained that way for the next hour” and “Several times during the concert, inmates burst into boisterous, spontaneous applause. And at concert’s end, the prisoners gave the players a standing ovation” (Gutierrez, 2015). Inmates later asked for opportunities to perform with the symphony, or learn how to play the instruments (Gutierrez, 2015). The Philadelphia Orchestra has had similar experiences with inmates at the Philadelphia Detention Center, performing participatory music so that inmates could engage: “Listeners got their cue. The sound they made carried the weight of a quiet, tragic end” (Dobrin, 2017). Prisons in Venezuela are also looking into ways of engaging inmates by trying to implement the successful El Sistema into their prison system (Grainger, 2011).

4.18 Programs for Veterans and Military

This is another area where many orchestras are supporting the population by providing free and/or discounted tickets, and many offer tribute concerts as outlined in the previous section. Pittsburgh Symphony also offers these option through their *In Honor of Service* program, and also provide presentations by symphony musicians in the VA Pittsburgh Healthcare System (“In Honor of Service,” n.d.). This is the only option that was easily identified through internet research, though there could be other programs available.

4.19 Conclusion

There are many ways in which organizations are engaging with the various members of their community, however there are some population groups that are not being served.

Surprising areas that seemed to have little representation might include veterans, communities in rural or small towns, disabled, immigrants/refugees, and there may be more specific to certain communities. As DEI becomes integrated into more orchestras throughout the country, these programs will likely grow. In the following chapter, four orchestras throughout the Pacific Northwest will be compared in case studies to examine how they are identifying under-represented populations and developing programs to fill a need in their community.

CHAPTER FIVE:

HOW PROFESSIONAL SYMPHONY ORCHESTRAS OF THE PACIFIC NORTHWEST ENGAGE UNDER-REPRESENTED POPULATIONS WITHIN THEIR COMMUNITY: A COMPARATIVE CASE STUDY

5.1 Introduction

The following section focuses on four professional symphony orchestras of the Pacific Northwest: Boise Philharmonic, Eugene Symphony, Oregon Symphony, and Seattle Symphony. They were chosen primarily on their location within the United States, but were also used because of their similarities and differences in the following: budget, geography, program offerings, size of staff, population of community served, and much more. With each organization, the city in which the orchestra is house will be examined and put into context. This helps to explain the programs being offered, how they were developed, and why they are important, and necessary, to each community.

These case studies will be based on interviews with employees within the community engagement department of each orchestra, along with materials provided by these key employees, information gleaned from the organization's website, tax documents, professional journal articles and reports, newspaper articles, and more. These will be used to exemplify what each organization is currently offering, and showcase the environment in which each organization lives. While these organizations will be compared in this section, findings and conclusions will be thoroughly discussed in the final chapter of this study (see Chapter Six).

5.2 Boise Philharmonic: City Profile

Boise is the capital of Idaho, and with a population of 223,152 can be considered the largest city in the state (<https://www.census.gov>). The chart below (see Figure 5.1) provides

census information for the city, much of the information is not surprising, however the population seems to be trending younger. The Boise metro area is quickly growing with a population increase of 3.8% in 2017 (Blanchard, 2018). Many people from the California area are migrating to the city, which will gradually change the dynamic of Boise (Carlton, 2018). Boise is now in the top ten cities, ranked number two according to Forbes, for young professionals (Blanchard, 2018). The attractiveness of Boise, with its beautiful surroundings and small town feel, may change if the recent population changes continue. Although the increase of people brings diversity, new culture and more opportunities it can also change the feel of the community for locals.



Figure 5.1 – Boise Population (<https://censusreporter.org/profiles/16000US1608830-boise-city-id/>)

Though Boise is the capital, it is common to hear this area referred to as the Boise Metropolitan area, Boise Valley, Treasure Valley, and sometimes others. This area is made up

of five counties and eight cities (Darr, 2012). The largest cities in the area are Boise, Nampa and Meridian but also include: Eagle, Star, Kuna, Caldwell and Garden City (see Figure 5.2).

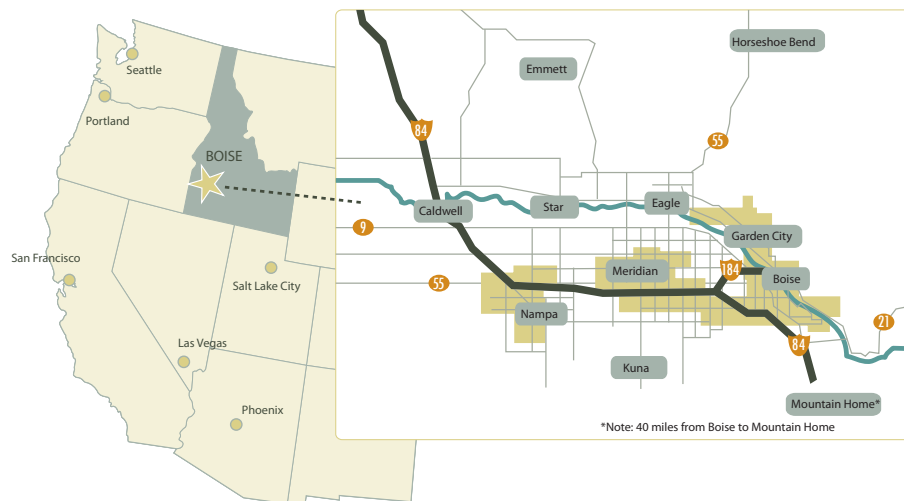


Figure 5.2 – Map of Boise Valley (<http://www.bvep.org/images/content/docs/boise-valley-regional-map.pdf>)

5.3 About the Boise Philharmonic

The Boise Philharmonic is “Idaho’s largest and oldest performing arts organization” (“History,” n.d.), and performs for over 55,000 annually at the Morrison Center and in other areas within the valley. Though the orchestra can trace its roots back to as early as 1885, the Boise Philharmonic as it stands today was established in 1960 (“History,” n.d.). The Boise Philharmonic budget from their Form 990 in 2016 was \$1,513,201² which puts this orchestra in Group D of the League of American Orchestras classification. The organization employs over eighty musicians, less than twenty employees, three salaried ensembles (chamber sized), and chorus members. They recently hired a new Conductor and Executive Director. The mission of

² All budget information for the four symphonies was gained through <http://www.guidestar.org>

the Boise Philharmonic is to musically enrich, entertain and educate through community engagement and music performance at the highest level (“History,” n.d.). Their season averages seven programs in their “Classical Series” – one performance in both Boise and Nampa – along with some extras and “Pops Series” performances. They also offer the fun option of a pub crawl, which includes the three salaried chamber groups being stationed at three different breweries within Boise. Audience members can visit each site and enjoy music throughout the night.

5.4 Community Engagement

The Boise Philharmonic focuses most of their engagement efforts on education and the Boise Philharmonic Youth Orchestra, but also offers programming for community members. Lauren Folkner (personal communication, March 26, 2018), Director of Education and Outreach with the Boise Philharmonic, commented that most of her time is spent with the youth orchestra, though she also works on the other programs the philharmonic offers to their community. Though the youth orchestra is a large focus for the organization, it is essentially an auditioned group available for students in high school throughout the Treasure Valley (“Youth Orchestra,” n.d.). The goals, and purpose, for the youth orchestra are as follows:

1. To provide talented, accomplished young musicians from throughout the Treasure Valley with outstanding musical training and experience through full orchestra rehearsals and performances.
2. To enhance and develop current and future arts participation by our youth.
3. To enhance the cultural life of the Treasure Valley by providing excellent performances of orchestral music. (Boise Phil website)

The youth orchestra is open to students in grades 9th-12th, and “provides professional ensemble training and opportunities through rehearsals and coachings from principal players of the Boise Philharmonic” (“Youth Orchestra,” n.d.). The orchestra meets every Monday evening, and performs three concerts each season. At this point, the youth orchestra is not involved in any

community related programming, and though there is room for growth, the orchestra does the best with the capacity that they have to work with (personal communication, March 26, 2018).

Much of the educational programming allows the organization to bring music to students at local schools. Conductors in the Schools offers the unique opportunity for local high schools to receive a visit and rehearsal with the Boise Philharmonic's music director. Musicians in the Classroom is another example of this and focuses on 2nd grade students (personal communication, March 26, 2018) by sending salaried philharmonic musicians into more than 275 classrooms in the area ("Musicians in the Classroom," n.d.). Folkner adds that these classes are throughout the valley³: the philharmonic works with both private and public schools, and they often travel to Nampa which is a more rural community about 20-miles outside of Boise proper. The 30-minute presentations connects language arts to music, and are based on Idaho standards for Language Arts (speaking and listening) and Music (responding):

- SL.2.2 Recount or describe key ideas or details from a text read aloud or information presented orally or through other media.
- MU:Re8.1.2a Demonstrate knowledge of music concepts and how they support creators'/performers' expressive intent.
- Mu:Re7.2.2a Describe how specific music concepts are used to support a specific purpose in music. (2017-18 Musicians in the Classroom Handout).

The 2017-18 Musicians in the Classroom Handout also lays out the following questions and concepts.

Essential Questions Explored:

- How does understanding the structure and context of music inform a response?
- How do we discern the musical creators' and performers' expressive intent?
- What connections can we make between musical ideas and stories?

Key Concepts Presented:

- Hearing and visualizing a soundscape
- Listening Strategies: Visualization, making connections, and making predictions
- Concert etiquette

³ Boise Valley, Treasure Valley – different names for the same area

This program reaches their most diverse audience as the musicians are entering the classroom and exposing each student to these instruments and their performance (personal communication, March 26, 2018). Within the 3-4 districts that the philharmonic covers, there is a lot of diversity among the students they are able to reach. Folkner considers many of these students to be under-represented community members or demographics, as they often contain students from rural areas, children from families of migrant workers, refugees and immigrants – many of which may have never had the opportunity to listen to classical music, or even hear a western instrument (personal communication, March 26, 2018). Folkner explained that “it is important to us to contact every second grader regardless of socio-economic status”, and adds: “it’s available to all students regardless of their ability to get, or have, this kind of exposure” (personal communication, March 26, 2018). She also adds that the Children’s Concerts the philharmonic offers is another way to engage students that might not have the opportunity to experience a concert. Often these schools are a little bit more rural, so sometimes there is issue with affording the bussing. These concerts reach more than 12,000 students in grades 3rd through 5th, and “the full Boise Philharmonic Orchestra connects musical ideas to subjects in the central curriculum (“Children’s Concerts,” n.d.). While the concerts are completely free, the philharmonic is not able to compensate for bussing expenses at this time.

Though most of their programming is within the educational spectrum, they do offer some additional options for community members. The salaried musicians used for educational engagement also travel to the local veteran’s home to perform 2-3 times each season (personal communication, March 26, 2018). It could be any of the three salaried chamber ensembles, however this past year was only the brass quartet and woodwind quintet as the string quartet was out of services (personal communication, March 26, 2018). The veterans have a space in their

schedule between dinner and their time in chapel in which one of these salaried ensembles perform a one-hour concert. Musicians and employees engage with the audience, but the concert would not be considered a hands-on experience (personal communication, March 26, 2018).

The philharmonic also has initiatives to travel to local senior homes, though this has not been feasible this season. Folkner has now been in her current position for a year, and hopes to increase their engagement opportunities within their community. She hopes to continue their programming within the senior homes of the area, and to also start a concert program with the Department of Corrections (personal communication, March 26, 2018). She also adds that there seems to be a gap in their programming when it comes to middle school aged students, and this should be something to look into as that is an important age when it comes to development (personal communication, March 26, 2018).

5.5 Eugene Symphony: City Profile

Eugene is the home of the University of Oregon and is also referred to as Track Town USA because of its deep roots in athletics, track and field. With its location within Lane County (see Figure 5.3) along the I-5 corridor⁴ and just two hours south of Portland, this city not only attracts people just passing from one major city to another but also those coming into town to attend one of the many unique events. John (2017) writes: “This is a town of parks, trees and waterways, a hiking mecca that melds swiftly into the nearby mountains. It also feels slightly scruffy: a former hotbed of hippies and anarchists whose radical edge lives on in its environmental agenda” (p. 1).

⁴ The stretch of highway that runs through Washington, Oregon and California. Most of the state’s population, and “cultural” cities are along this corridor.

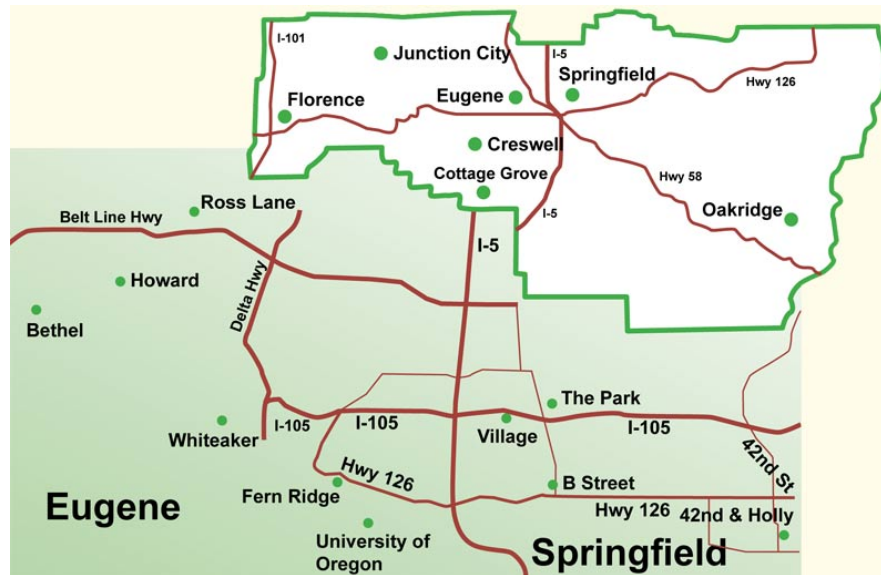


Figure 5.3 – Map of Lane County (<https://www.hsolc.org/content/contact-us>)

You are still able to feel this “hippie” vibe among the 140,000 plus people that live in Oregon’s second largest city (“About Eugene,” n.d.), and there are many cultural events that happen throughout the year – usually involving a variety of businesses and organizations. Though the city may not be considered diverse (see Figure 5.4), there are a variety of people that call Eugene home. There are many professionals in the area (doctors, lawyers, educators, etc.), even more students, and a growing homeless population that largely resides in the Downtown area. This variety in the population adds a variety not only in the culture, but the programs and resources available to the various communities.



Figure 5.4 – Eugene Population (<https://censusreporter.org/profiles/16000US4123850-eugene-or/>)

5.6 About the Eugene Symphony

With its mission of enriching lives through the power of music, the Eugene Symphony, now in its 52nd season, offers a variety of concerts, community programming, guest artists, educational events and performances with new and commissioned works. The symphony has a long-range plan, most recently adopted in 2013, which expresses their vision, values and goals. This long-range plan, entitled *A 21st Century Vision*, lists the following “Core Values” for the Eugene Symphony:

Excellence

We are committed to the highest artistic and professional standards and serve as good stewards of our institution.

Service

We engage our community through meaningful experiences.

Passion

We are driven by a deep connection to music that inspires our work.

Optimism

We have a sense of possibility, approaching challenges from a positive perspective. (p. 3, 2013).

The long-range plan also highlights three goals, though the first is most relevant to their role within the community, and are listed under “Our Big Goals”:

- I. To make the concert-going experience an essential part of life.
 - We awaken the innate musical curiosity in every individual.
 - We perform to capacity crowds that trust us to deliver great musical experiences.
 - Our community engagement programs allow multiple points of entry and are available to people at all levels of experience.

Current Strategies:

- Explore opportunities for multiple summer concerts, some of which may have associated ticket prices.
- Focus the education committee’s efforts on expanding education and community engagement programs.
 - Develop activities that address the learning needs of current and future audience members that are designed to deepen their connection to the Symphony.
 - Program auxiliary activities throughout the concert week.
 - Support effective arts advocacy strategies.
 - Foster key relationships with regional school administrators and educators.
- Research and implement electronic media that allow performances to be electronically downloadable and/or disseminated.
 - Create a working group of staff, musicians and board members to determine appropriate technologies and recommend an implementation plan.
- Diversify our range of performance formats, styles and venues. (p. 3, 2013).

This past season, the symphony partnered with Mckenzie River Trust to program a performance of Vivaldi’s *Four Seasons* which featured photography of the Mckenzie River by local photographers, both professional and amateur. The Hult Center for the Performing Arts, city owned, is located in the heart of downtown and houses the Eugene Symphony, in addition to the Eugene Opera, Oregon Bach Festival, Eugene Concert Choir, and Eugene Ballet. The Eugene Symphony has an annual budget of \$2,641,956 as filed in their 2016 Form 990. Their most recent season offered a monthly concert beginning in September and ending in May, and

also offered special concerts (Renee Fleming, Cirque de Symphony) and youth concerts. They recently hired their new maestro, Francesco Lecce-Chong, who conducted the orchestra for the first time in their recent 2017-18 season.

5.7 Community Engagement

Eugene Symphony is classified as a Group C orchestra with a budget of over 2 million, and employs a part time orchestra and roughly ten full time employees. Their community engagement and education department employs only one person, yet they do an excellent job with providing diverse and relevant options of programming for the members of their community. Their Annual Report for 2016-17 explained that through this department over 20,857 community members, from toddlers to seniors, were served. Katy Vizdal, Community Engagement and Education Coordinator for the Eugene Symphony, explained that much of the educational programming overlaps with community engagement (Vizdal, K, personal communication, March 23, 2018). The Eugene Symphony educational programming falls into two areas of focus: schools and students. For schools they offer their *Encouraging Young Musicians to Achieve* (EYMA) program, *Youth Concerts* and *Link Up*; For students they offer master classes, artists residencies, young artist competitions and private teachers. *Play It Again* is an option for lifelong learners which allows them to perform with a small chamber group within the program and receive coaching. There are also options for pre-concert talks through the *Symphony Guild Concert Preview* and a more casual approach with their *Happy Hour with Francesco Lecce-Chong*.

The Eugene Symphony has also developed many programs for their community, which often involves performances and programing outside of the concert hall. Often these programs

reach a broader, more diverse and under-represented population within the community. Vizdal explains that the organization has a commitment for diversity, equity and inclusion (DEI). The Eugene Symphony created a DEI sub-committee in their 2015-16 season which has now turned into a standing committee. The committee looks into ways that the organization can be more inclusive, and the education and community engagement programs are strongly influenced by this. She also adds that “when they use the term “diversity” it is inclusive of: ethnicity, age, sex, gender, socio-economic – it is a broad scope” (personal communication, March 23, 2018).

Always looking at programs with a lens for how they can adapt programs to be more inclusive instead of just creating programs for specific communities, she wants to be able to serve whoever shows up. Vizdal made reference to the infographic displayed in Chapter Three (Figure 3.1 – What is Inclusion?), explaining that it is a good example of what inclusion should be. The orchestra also opens up their dress rehearsal to community members that may not be able to afford a ticket to a concert, and have 100 tickets to each family concert performance to give away. There is a new sponsorship program which allows community groups to be able to attend concerts for free, and there are often sponsorships available to the majority of their programs.

Instrument Petting Zoo

Instrument Petting Zoos is a program that brings in a variety of instruments for community members to try out. These are held at a variety of locations, including Concerts in the Park and other festivals. These are also offered in partnership with local libraries: Eugene Public Library branches – Eugene, Bethel and Sheldon, but many regional libraries are now interested. This upcoming summer will also include Springfield, Fern Ridge and Creswell which provide more options in rural areas. These Instrument Petting Zoos also feature a musician that

will read a music related story and then demonstrate their instrument (personal communication, March 23, 2018). Vizdal hopes to make these more accessible to all young people, and specifically young people that may be sensitive to stimulation. She hopes to offer noise reduction headphones.

Artist Residencies

Artist Residencies allow guest artists to broaden the scope of their involvement, and have a deeper impact with the community, during their time with the symphony. There are at least one each year, though last year there were two and this year there are four. In 2017-18, they are hosting Augusta Reed Thomas twice (conductor), Zuill Bailey (cellist), and Third Coast Percussion. What this entails varies depending on the skill set of the performer, and what community partners have been approached. Zuill Bailey had a robust residency which included pop-up performances at the Eugene Library, University of Oregon Erb Memorial Union, Broadway Commerce Center (Downtown), and also did educational visits at a local middle school in addition to a master class with local cello students. Other performances were at the local Boys and Girls Club, and Food For Lane County which is a dining room that serves a dignified meal to individuals that need somewhere to eat, Peace Health River Bend Hospital – he performed in the chapel, and it was then broadcast onto the televisions within patient’s room (personal communication, March 23, 2018).

Arts and Music Together, a program partnership with Oregon Supported Living Program (OSLP) Arts & Culture Program, was inspired by the residency with Augusta Reed Thomas and offered two classes that were each three months in length. Working with clients OSLP serves, adults with and without disabilities, the class teaches them to create art inspired by music, and

also featured an Instrument Petting Zoo and a concert by symphony musicians. The art will be showcased in the lobby during the concert featuring Augusta Reed Thomas – clients also receive free tickets and a reception for the exhibit. In addition, OSLP featured an art exhibit at their Lincoln Gallery, entitled: “Composed: Art & Music Together”, which ran from April 6th – May 24th, 2018. This program is only planned on being implemented for the current season in conjunction with the Augusta Reed Thomas residency. Augusta Reed Thomas met with the two class instructors and then the class was implemented by these instructors. A lot of the curriculum was focused on tone mapping- which are visuals inspired by her music, they played music written by Thomas, and created art while a musician performed. These classes had a total of 20-25 total participants (personal communication, March 23, 2018).

Link Up

Link Up has been offered with the Eugene Symphony for about five years, and is funded by grants and local sponsors and donors. The partnership with Carnegie Hall (see Chapter Four) allows the symphony to provide materials to schools (grades K-8), public and private, throughout the region – there is an initiative to get rural schools involved. Curriculum and professional development is provided free of cost. There is a culminating youth concert at the end of the program where all participating schools are encouraged to attend, and the symphony offers scholarship based on free/reduced-lunch criteria and sometimes will also assist with bussing. Link Up is also an option for the BEST After School Program⁵ of the 4J School District in Eugene which reaches four specific elementary schools, and these schools have visiting artists

⁵ Title 1 Schools. Schools are chosen because they are the highest poverty rate in the area. Students are referred to the program based on academic and personal need to have a safe place to stay after school. On average, these school serve students that are 47% white, 42% Hispanic/Latino, 2% African American, 2% Native American, 1% Native Hawaiian, 7% Multi-Ethnic (personal communication, March 23, 2018).

teach the curriculum (personal communication, March 23, 2018). These students then perform on stage along with one student from each participating school; however, the rest of the students are able to play along from their seats in the audience. This program, and this concert, is important because it reaches students that may not have had an opportunity to participate in a cultural event outside of school, or perhaps had not even left their hometown before. The hope is that this program will inspire students to continue with music education and involvement throughout their time in school, but there is not currently a way to measure this. Vizdal has a personal goal to continue reaching Spanish-speaking students and community member both in the school system, but also make materials more accessible by offering a Spanish translation – especially when working with BEST after school. There is a translator available for youth concerts (personal communication, March 23, 2018).

Encouraging Young Musicians to Achieve (EYMA) and Rural Initiatives

EYMA sends symphony musicians into middle school and high school programs to provide more in-depth instruction, each school chosen gets five visits from a musician and are based on the need of the school. This year funding was received to expand to more rural schools: twenty schools are currently served, and ten of which are specifically rural – within Lane County. Many of the locations they visit are in communities that may not have direct access to cultural resources. There is also an extended residency in Roseburg with the Douglas County Youth Orchestra: four musicians are sent once a month for seven months to work with these younger musicians (personal communication, March 23, 2018).

Concerts in the Park have been offered in Eugene for many years and have recently expanded to Cottage Grove and Roseburg. Vizdal explains that “we do have a commitment to

taking our symphony into surrounding rural communities” (personal communication, March 23, 2018). Concerts are completely free and are in a centralized location within these communities. Instrument Petting Zoos are available at these as well.

Symphony Connect

Symphony Connect was piloted in their last season (2016/17), and “brings music to community members that may traditionally not be able to experience cultural resources” (personal communication, March 23, 2018). The program uses a string quartet that works with a local, certified music therapist to develop material that would be beneficial to the audience. “Symphony Connect brings the power of music to the community for inspiration, healing, and connection” (“Symphony Connect,” n.d.), they currently work with low-income housing sites, an alternative high school, a center for patients with psychiatric disorders, among others. The program is expanding this year to include two more partners, and has an extensive waiting list of organizations that would like to participate in this program. At most, if not all, of the sites, many of the audience members come from low socio-economic/low-income community members, including people that are experiencing homelessness. The program also reaches veterans, altered individuals, people experiencing mental illness, and at-risk youth. One of the new partners, Relief Nursery, works with families with young children that are at risk for abuse or neglect (personal communication, March 23, 2018).

These performances are usually two times per year and take place outside of the concert hall, musicians travel and perform at each individual partner’s sites. The program was originally developed with input from Lane County Human Service Commission and the Department of Health and Human Services. Vizdal explains that “The goal of the program is really to meet

people where they're at, the musicians wear casual clothing or street clothes, the performances are designed to be really accessible and engaging", and adds "the musicians learn about each partner site and any considerations that should be known prior to going into those sites" (personal communication, March 23, 2018). Programs are "client centered", and are developed to be performed at each site and include ways to get the clients to participate either by dancing, drawing or singing. The goal is to build connection among everyone in the room together, including clients, staff and musicians. The music therapist counts the number of interactions between the various groups, and they survey the clients to see if they experienced mood changes as a result of the performance, retention is also measured (personal communication, March 23, 2018).

5.8 Oregon Symphony: City Profile

Portland is Oregon's largest city and arguably the state's most diverse (see Figure 5.5). The Portland Metro area (as defined by the US Census Bureau), made up of seven counties, had population of over 2.4 million people in 2017 (Theen, 2017), and the City of Portland was considered the 26th largest city in the United States with a population of over 630,000 residents in 2016 (Frazier, 2016).



Figure 5.5 – Portland Population (<https://censusreporter.org/profiles/16000US4159000-portland-or/>)

The US Census Bureau defines the Portland metropolitan area includes seven counties: Multnomah, Washington, Clackamas, Columbia and Yamhill counties in Oregon, and Clark and Skamania counties in Washington (Christensen, 2016). However, Portland Metro defines the metro as including 24 cities (Beaverton, Cornelius, Durham, Fairview, Forest Grove, Gladstone, Gresham, Happy Valley, Hillsboro, Johnson City, King City, Lake Oswego, Maywood Park, Milwaukie, Oregon City, Portland, Rivergrove, Sherwood, Tigard, Troutdale, Tualatin, West Linn, Wilsonville, and Wood Village) and three counties: Clackamas, Multnomah and Washington (“What is Metro?” - see Figure 5.6). However, when people refer to Portland, they are often referring to the “Greater Portland area”, which is also slightly different (see Figure 5.7), or simply “Downtown” (see Figure 5.8).

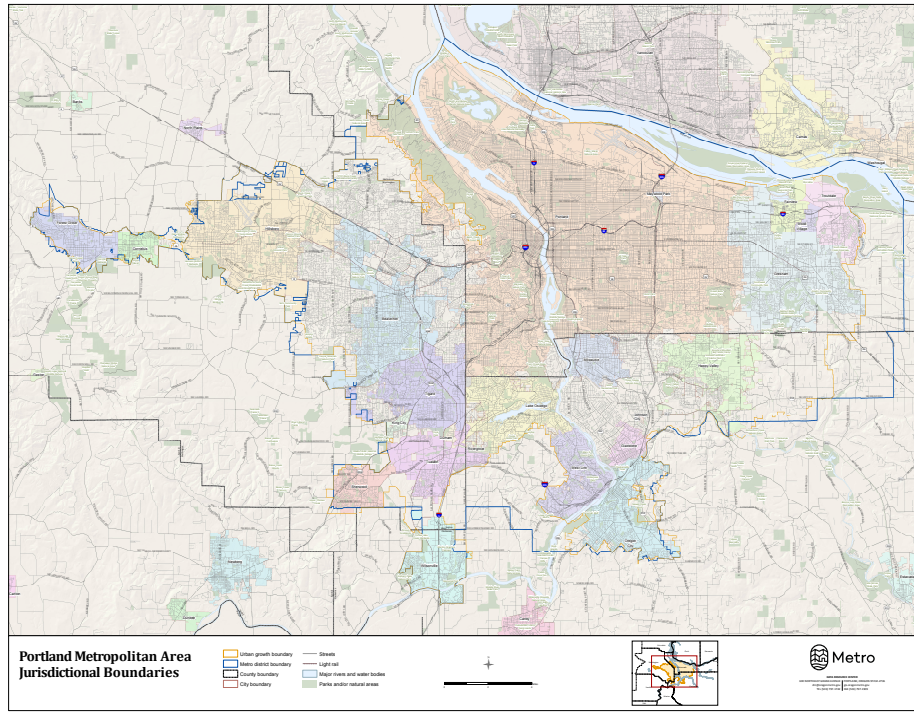


Figure 5.6 – Portland Metro area (<https://www.oregonmetro.gov/jurisdictional-boundaries-maps>)

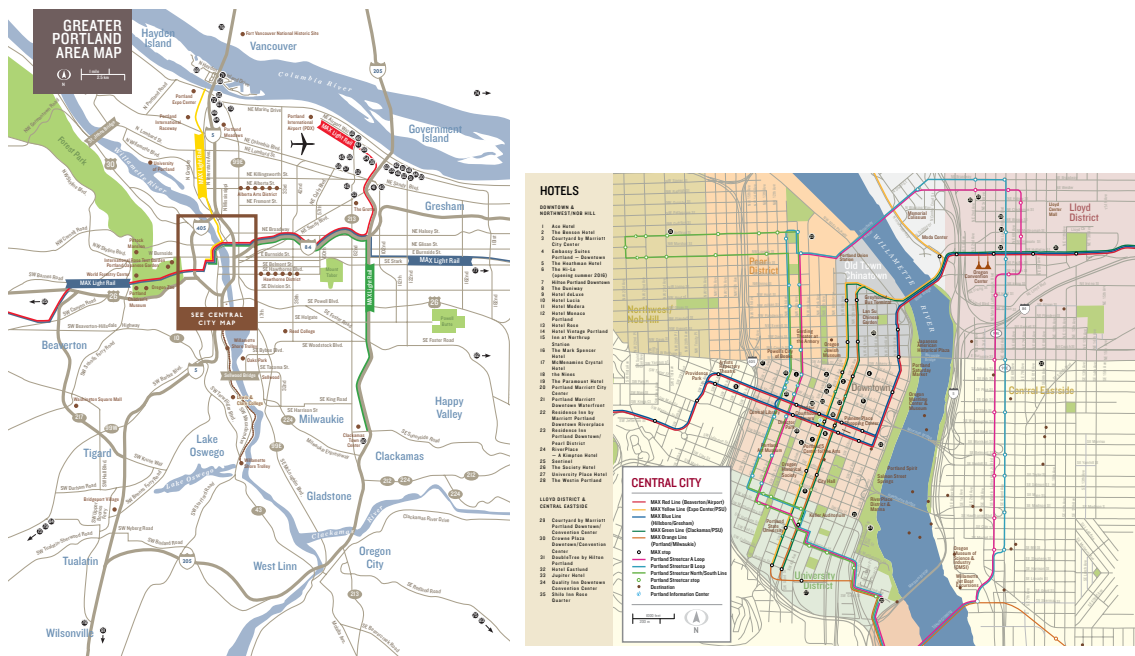


Figure 5.7 (left): Greater Portland Area (<https://www.travelportland.com/wp-content/uploads/2013/09/greater-portland-map-2.pdf>)

Figure 5.8 (right): Downtown Portland (<https://www.travelportland.com/wp-content/uploads/2014/03/Portland-City-Center-Map1.pdf>)

With its location almost halfway between Eugene and Seattle along the I-5 corridor, this is an ideal spot for travelers, residents and business professionals. Portland is often considered to be full of hipsters and with a laid-back feel, which is often reflected in the variety of breweries, restaurants and coffee shops available throughout the area. However, there are also many options for art, culture and expressing yourself through a variety of venues and programs. As was mentioned in the Eugene section, there is a growing number of people experiencing homelessness within the Portland metro area, and this has been a large influence in business decisions, and programming throughout the area.

5.9 About the Oregon Symphony

The Oregon Symphony premiered their first concert on October 30, 1986 which means that they are the “oldest orchestra west of the Mississippi” and were first known as the Portland Symphony (“Oregon Symphony History”). This Grammy-nominated symphony performs in the Arlene Schnitzer Concert Hall in Downtown Portland, which is a part of the Portland’s Center for the Arts (“Oregon Symphony History”). Their current conductor/music director, Carlos Kalmar, has been with the orchestra since 2003, and the orchestra also has two other conductors on staff. In addition, the symphony employs over 50 employees within four different departments, a Board of Directors with a little more than twenty-five members, and has an annual budget of \$16,968,840 placing it in Group B. The mission of the Oregon Symphony is to “serve our communities by creating outstanding live musical experience”. In their 2016-17 season, for example, the orchestra presented 111 full-orchestra performances which included world premieres of commissioned works and performances from world-renowned visiting artists (2016/17 Annual Report).

5.10 Community Engagement

The Oregon Symphony provides a variety of opportunities for community members to become involved with the orchestra. In a provided material, entitled: Music Education & Community Engagement Programs FY18, the document reads:

The Oregon Symphony is committed to bringing music experience, education, and performances opportunities to the entirety of our diverse community. Because we are Oregon's symphony, with our reach extending into southwest Washington, we are expanding our programs to serve members of our community with limited or no access to cultural experiences, such as those living with cognitive loss, the incarcerated, and other isolated populations unable to visit us in the hall. (p. 1).

The document also highlights that “music can empower youth, spark reflection in our community, and provide a beacon for the isolated and marginalized” (p. 1). Later in this document, the organization offers the following goals which are at the core of these programs:

- (1) Inspire youth by guiding children along the first steps on the path of musical discovery;
- (2) Support a community of music makers by mentoring student musicians and encouraging life-long learning of music;
- (3) Improve the lives of community members through music. (p. 4)

The orchestra offers a series of concerts specifically for young children, often interactive and thematic, which include their Young People's Concert (grades 3-8), Kinderkonzerts (grades k-2), Kids Concerts (grades k-5), and Link Up (grades 3-5) – see Chapter Four for more information on this program, and Symphony Storytimes: a program for preschoolers at county libraries that mix music with literature (“For Families”). Ensemble performances and Informances are available for grades k-12, master classes and coachings (grades 7-12), and the symphony offers ten dollar tickets for students through college. Additionally, they have an Artist-in-Residence and partner with local youth orchestras to provide side-by-side rehearsals and performances. Their Education and Community Engagement Programs 2016-17 Year End

Report stated that these programs reached over 61,000 community members in schools, the community and the concert hall with over 265 events throughout the season (p. 7).

Along with their robust education, youth and family programs, the Oregon Symphony offers programming created to reach members of the community that are unable to attend a concert for one reason or another and are thus under-represented. Many of these will be explored in the following sections, but it is important to note that the symphony also broadcasts their concerts through All Classical Portland streamed online (Hayes, M., personal communication, March 13, 2018). The broadcasts reach an estimated 12 million people internationally, and are an important part of their engagement goals (“Music Education & Community Engagement Programs FY18”, p. 1). Monica Hayes, Education and Community Programs Director, provided insight on how the Oregon Symphony is entering the community and working with local partners to reach these constituents.

Sounds of Home

Sounds of Home was a three concert series specific to their 2017-18 season, but there is a plan of continued partnerships in subsequent years. The Sounds of Home concert theme touched on three compelling topics: immigration, the environment, and homelessness. These did not just involved main stage concerts, though the performances on stage did address these topics, much of this program was carried out into the community. All of the outreach events were free and open to the public, and some were also available on Facebook Live. Hayes explained that this has been a learning experience both for the symphony and community partners who not only became educated on what is going on in the community, but how showed how music can shed

light on community issues and perhaps help the community to meet their goals (personal communication, March 13, 2018).

For the immigration series, work was done with IRCO (Immigrant Refugee Community Organization) and Catholic Charities to bring performances to the clients directly or to provide them the opportunity to attend a concert that they may not have been able to attend in the past for a variety of reasons. There was an event which showcased local, immigrant artists that have continued to thrive in the Portland area. The symphony had a month-long household supply drive in December to give audience members the opportunity to donate items to IRCO (personal communication, March 13, 2018).

The environmental themed event was in partnership with the Audubon Society of Portland and Friends of the Columbia Gorge, and was focused on the birds of the areas and maintaining their natural habitat. There were four pieces commissioned for their woodwind quintet based on bird songs: four local composers were able to choose sound clips of birds from the area provided by the Audubon Society of Portland, and compose a piece inspired by the bird calls. This event was held at the World Forestry Center, again, free and open to the public, but was only advertised by both the Audubon Society of Portland and Friends of the Columbia Gorge. The reasoning was to bring in new members of the community, affiliated with these organizations, to experience the Oregon Symphony. These partners were able to speak on concerns they have for the environment, to pair the topics with music and inform the audience about how the community can help (personal communication, March 13, 2018).

The final portion of this series focused on homelessness. There was a piece commissioned by the Oregon Symphony composed by Gabriel Kahane, which addressed homelessness in the Portland area. The first half of this concert featured violinist Joshua Bell

(personal communication, March 13, 2018). The concert utilized a 40-person choir, with members from different social service groups in Portland, singing the final movement of this newly commissioned piece. Many of the members of The Maybelle Community Singers choir have found stable housing, while a few of the remain homeless. On the day of his arrival in Portland, Joshua Bell performed a recital specifically for clients Central City Concern, which helps people transition from the streets into homes. The Lullaby Project was also a large project that worked with women seeking stable housing for their families in the Portland area the Portland Homeless Family Solutions. Singer- songwriters and Oregon Symphony musicians had a creative day in which they worked with these mothers to write a lullaby to their child (personal communication, March 13, 2018).

Hayes explains that “it’s based on the mother writing a letter to her child, to be read in early adolescence. The theme is “what are you hoping and dreaming for you child.” She adds that it was a “very moving and impactful day” (personal communication, March 13, 2018). After working together on the lyrics and melody, the songs were then put down on paper by songwriters, and a CD was recorded by the singers and musicians and presented to the mothers giving them opportunity to reflect on their song and to make any changes before the final taping and CD pressing. They also spent time with the mothers reflecting on what the process had been like for them to write a lullaby to their child. Hayes (2018) explained that she personally learned about how the brain may hinder the creative functions in a time of deep crisis. One of the mothers performed her lullaby with the singer-songwriter, while others chose to have professional singers and symphony musicians perform and record their song instead. The project concluded with a celebratory concert at The Old Church Concert Hall. The Lullaby Project was chosen as a project because they wanted something that was not only engaging but impactful.

The Lullaby Project is funded for three years by the Storms Family Foundation (personal communication, March 13, 2018).

Though these concerts are directly engaging agencies and community members experiencing the issues in which this concert series addressed, Hayes points out that symphony audience members are also becoming more aware and educated simply by attending a concert. She adds that “music is a very strong community-builder” (personal communication, March 13, 2018), and it may show that regardless of a person’s situation music connects. This has then inspired audience members and donors to contribute to and support the work on these issues within the community (personal communication, March 13, 2018).

Correctional Facilities

Each year the orchestra goes into the Coffee Creek Correctional Facility, a female prison in Wilsonville, Oregon. The program has been going on for four years: the first two years involved the symphony performing Christmas carols and the inmates were able to sing along, but after that the program shifted and instead began including the Intergenerational Choir⁶ to perform with the symphony musicians. Each year the symphony also goes into St. Mary’s Home for Boys, which is not just juvenile detention but is also a therapeutic placement. The symphony and, whoever the artist-in-residence is at the time, visits each year to perform in their chapel and to build relationships with the boys. The average length of stay at St. Mary’s is 18 months, so often the same boys are not there each year, so each year is a very special visit and sharing of music and powerful healing through this partnership. The symphony hopes to be a partner not only while these community members are incarcerated, but also once they are released. Hayes

⁶ A choir within the facility that also helps inmates transition into certain choirs outside of the facility, providing a support system outside of the correctional facility.

mentioned that they are always asked, “Why do you come here?”, and she replied “Our answer is always: because you are part of the community”. She adds that they always let them know that they are always welcome to the symphony (personal communication, March 13, 2018), they just need to contact the community engagement staff and they will be invited as guests of the Oregon Symphony .

musicNOW

Music therapy-informed sessions that work with clients that have some sort of memory or cognitive issue (Alzheimer’s, dementia). Three years ago this began in a private setting, but now with grant and donor funding, the program is now available in low-income community centers. It consists of four sessions in a month for about an hour and half, involving a musician and a music therapist through Earthtones Northwest. In its initial development phase, they partnered with Marylhurst University’s music therapy master’s program. These sessions are planned out to include a certain amount music, physical interaction, and singing along. The program was developed by the Oregon Symphony in partnership with EarthtonesNW, Marylhurst University, OHSU and Mary’s Woods Care Center. When it is fully funded, they will be able to go to centers that cannot afford this type of high-impact program independently. Clients are excited to participate and look forward to sessions (personal communication, March 13, 2018). They receive feedback from caregivers as to positive changes the clients may be exhibiting, and also learned how to effectively work with this. Clients’ life experiences differ at each setting, so programming and music is developed to address those experiences. This program was initially developed to reach community members that were no longer able to make it to the concert hall but still enjoy experiencing live music. They are hoping to eventually partner with local

healthcare systems and hospitals to continue building upon their current program (personal communication, March 13, 2018).

Studio to School Initiative

An initiative through the Oregon Community Foundation, which is a five-year program, partnering with the David Douglas School District. This project teams up kids in Alice Ott Middle School to receive private lessons with symphony musicians every week. The middle school director will provide a yearly spreadsheet to track retention within the program, and also sends reflections from the students. These students are all kids that would not be able to afford lessons independently. These students also are sent invitations to orchestra rehearsals, and there is a donor that periodically purchases tickets for forty kids to attend a concert. Many of these students had never seen an adult orchestra, and sometimes this is their first time in downtown Portland (personal communication, March 13, 2018).

Future Initiatives

Diversity, Equity and Inclusion is being identified as an important aspect of programming and what is being offered to the community. One sector of the community that they focus on is *Arts for All* program, which offers people with an Oregon Trail Card⁷ \$5 tickets to any concert. Youth concerts are free to students on free/reduced lunch at school, and they offer discounts to seniors, the military, and those with a fixed income. There is a plan for sensory-friendly concerts, but this is still being developed. Partnerships and collaboration are extremely important in this area. Hayes adds that D. E. and I is important within the organization itself, and

⁷ Welfare Card

also mentions that music being performed can also be more inclusive with compositions by women, people of color, and living composers.

5.11 Seattle Symphony: City Profile

Seattle is located along the coast in Washington's King County (see Figure 5.9). Their population recently exceeded 700,000 in 2017, and is not only the largest city in Washington but is also the 18th largest city in the country⁸ (Balk, 2017). Seattle is home to some of the largest companies in the country, and in some cases the world, including Amazon, Microsoft, Starbucks – just to name a few. These large companies pull many young professionals to the area, which effects the culture of the city. Roughly three hours north of Portland, this city is slightly more diverse (see Figure 5.10), and offers a variety of entertainment: museums, music venues, professional sport teams, and more. Similarly to Portland, Seattle also faces an ongoing homelessness crisis. In 2015 the mayor of Seattle declared a State of Emergency and since then they have been struggling to help those impacted and develop a positive solution (Coleman, 2018). Seattle is also the home to many different colleges and universities, including the University of Washington.

⁸ And still growing: according to Balk (2017), Seattle adds a little over 15,000 people annually and is the fastest growing BIG city in the United States.



Figure 5.9 – Map of King County (<https://www.kingcounty.gov/about/region/maps.aspx>)

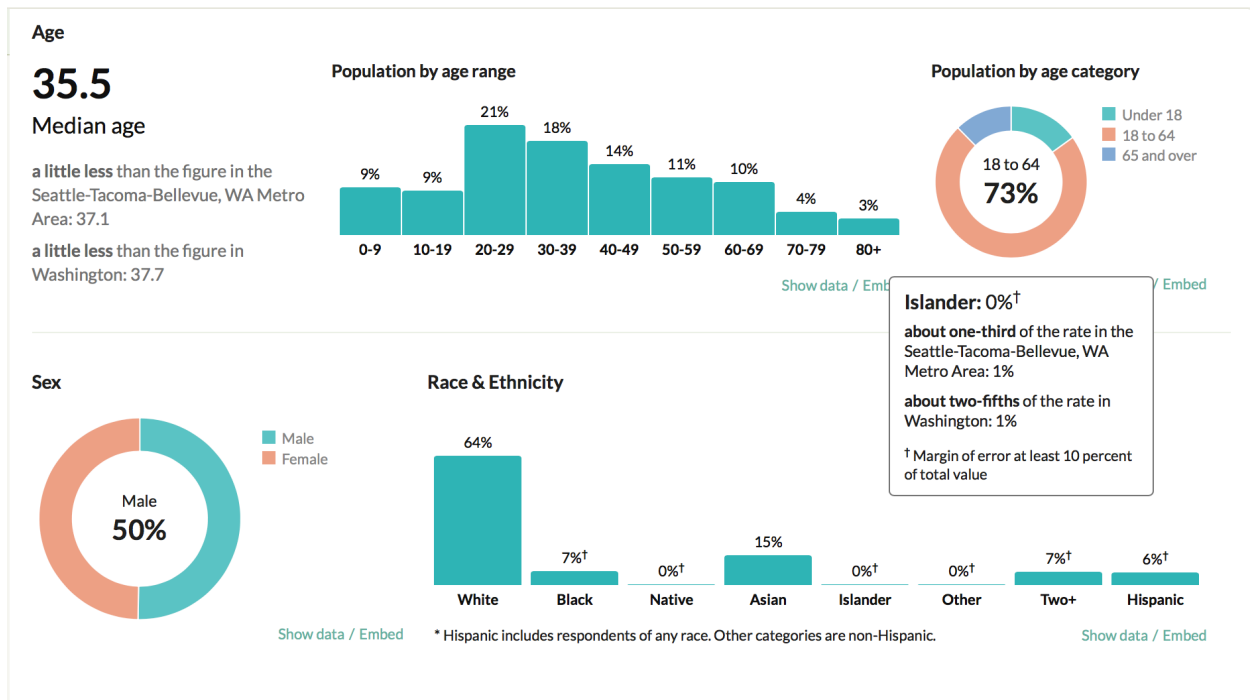


Figure 5.10 – Seattle Population (<https://censusreporter.org/profiles/16000US5363000-seattle-wa/>)

5.12 About the Seattle Symphony

“The Seattle Symphony unleashes the power of music, brings people together, and lifts the human spirit” (“About,” n.d.). Since its premier performance in 1903 has been an important part of the orchestral world (“History,” n.d.). The symphony has recorded almost 150 albums, received two Grammy Awards and nominated for twenty-one, and have also won two Emmy Awards (“About,” n.d.). The Seattle Symphony has had their own in-house recording, Seattle Symphony Media, since 2014 (“About,” n.d.). The symphony employs upwards of 70 people in a variety of departments, including venue staff as the symphony operates their own concert venue: Benaroya Hall. The orchestra is currently in the process of hiring a new President & CEO as theirs recently left to go to the Los Angeles Philharmonic. Their music director, Ludovic Morlot, has been with the orchestra since 2011 and is still with them today.

The Seattle Symphony works on a budget of \$28,682,290. This is one of the larger orchestras in the country and falls into the Group A category with the League of American Orchestras. Each season they present over 200 different performances within their various concert series, reaching over 315,000 people and even more through live and radio broadcasts (“About,” n.d.). The orchestra is guided with values as listed on their website: Excellence, Innovation, Curiosity, Collaboration, Respect, Inclusivity, Integrity, and Service. They also list the following goals for the organization:

- Strive for excellence in everything we do, building our global reputation
- Create a culture that reflects our values
- Be one of the most forward-looking orchestras in America, reflecting the energy and spirit of innovation of our city
- Achieve long term financial stability and security
- Make audience engagement and experience central to our endeavors
- Build meaningful connections with our communities. (“About”).

These goals clearly reflect not only their performance endeavors, but also the various community engagement effort that will be explored in the following section.

5.13 Community Engagement

The Seattle Symphony has the largest Education and Community Engagement program of the studied orchestras with four employees, including Vice President of Education and Community Engagement, Laura Reynolds, two program managers, a program associate and at least twelve teaching artists (“Administration,” n.d.). Education and community engagement programming is segmented into four categories: schools, families, community and young artists. There is a lot of crossover between these categories, and Reynolds (Reynolds, L., personal communication, April 3, 2018) notes that they ask themselves: “What is the role of an orchestra in its community?” She further explains that they do not just focus on new, cool programs, but on addressing barriers that community members may face with attending the orchestra and a large focus is access and inclusion.

Reynolds explains that in the different categories of engagement (schools, families, community and young artists) there are different kinds of under-represented populations and they have different ways of identifying these groups. One example she used was with educational programs: they may focus on Title 1 schools because they have fewer resources and are more economically and racially diverse. They also often have the least amount of art programming. With families, they are looking at ways of creating a more inclusive concert-going experience: “how can families of all different abilities have access and feel included in the concert experience” (personal communication, April 3, 2018). This has resulted in sensory-friendly concerts, and the symphony partners with universities and music therapy organizations in the

area to develop more accessible and inclusive options. These partnerships help inform the rest of their family programming.

Their “Families and Learning” programming features a variety of concerts for youth and their families: *Tiny Tots*, *Family Concerts*, *Community Concerts* – a program called *Family Connections* also allows kids ages 8-18 to attend concerts for free. *Link Up*, *Open Rehearsals*, *Side-by-Sides* and *Friday Matinees* are their primary school programs. There is a focus on young artists with their *Side-by-Side* program, composer workshops and provide opportunities for these artists to perform with the symphony. *Soundbridge*, Seattle Symphony’s Music Discovery Center, provides the opportunity for families and community members to participate in workshops. Additionally they offer a robust community engagement program which features three main components: Simple Gifts, Community Connections and Community Concerts. Reynolds mentions that community programs are unique because they reach such a wide range of people and they never know who may attend these programs: some may not know what the symphony is, some may have no experience with music, many hope to show their creativity (personal communication, April, 3, 2018).

Community Concerts

Community engagement is quite broad and involves many different areas of programming centered around access. One area is neighborhood concerts which are free concerts featuring the orchestra and a guest artist, another example includes side-by-side concerts which are a mentorship type concert with community and school orchestras in the area. Size and scale of these performances are based on services available with the orchestra and distance traveled. They try to travel to a variety of areas to reach different audiences, and have

developed strong relationships, including with the Des Moines Beach Park auditorium which is located in a more diverse area of the Puget Sound region (personal communication, April 3, 2018).

The side-by-side concerts are often held at the partner's venue, though they may prefer to perform at Benaroya Hall, because it is often more accessible to the community. While they have strong partners with certain high schools in the city, they also identify emerging programs to mentor. Prison concerts also fall under this category, and Seattle Symphony currently partners with Monroe Correctional Complex and Gig Harbor Women's Prison. These are a lecture-recital structured events which gives inmates the opportunity to ask musicians questions. This program was originally a husband-wife duet that performed at the prisons, and the symphony offered to support and grow the program (personal communication, April 3, 2018).

Community Connections

This program began in 2011 with the original goal of creating more access to symphony concerts to people in the community. The program focuses on six areas: youth, active military/veterans, senior citizens, cultural organizations, health services and social services. The symphony built partnerships with local nonprofits, beginning with only four and now partnering with over seventy, providing free tickets to their clients. Based on feedback from these partners, the symphony learned that the community wanted a deeper relationship and more opportunities to work with the symphony. This led to pre and post -concert talks and teaching artists visiting nonprofit facilities, and later evolved into larger-scale community compositions. One of the first compositions was with the native community which resulted in a composition performed by both the Seattle Symphony and members of the native community (personal communication, April 3,

2018). The Native Lands Project had the goal of building cultural understanding and respect through music with a partnership between the Seattle Symphony and tribal nations in the Puget Sound region (“Education and Community Engagement Programs” handout). This was a three year collaboration resulting in the *Potlach Symphony*.

Many guest artists are now interested in becoming involved with this process, and Reynolds explains that even though the process may be similar with each composition the outcome is always different depending on who is involved. One example was a composition with Plymouth Housing Group, *We Are The Art*, which was a six week workshop ending with a performance at the concert hall. The goal of this workshop was to build a community among the residents of a new building that had just been opened. Another example is the project *We Are All Here*, which again collaborated with Path With Art that lasted a year and combined visual art, spoken word, and music composition. The symphony portion was sixteen weeks long and ended with a final concert at the concert hall. These projects then launched a variety of future collaborations (personal communication, April 3, 2018).

The Lullaby Project began in 2013 and partnered the symphony with Mary’s Place, a local family shelter. For the first two year the symphony worked closely with Carnegie Hall to receive training from their teaching artists, and they currently send symphony staff and teaching artists to the annual conference in New York. They work with clients that may only be there because someone told them they should come, while others have been hoping to write a lullaby for years. Any parent, or grandparent, that wanted to be involved with this program are able to join. The project begins with professional development for staff and musicians, they then work with clients on the creative process with the project ending with a recording, listening/reflection session and celebration concert (personal communication, April 3, 2018).

These programs encouraged the nonprofit partners to seek new ways of collaborating with the symphony. One collaboration, *Lost & Found*, worked with Path With Art and composer/artist, Trimpin. The collaboration worked with the community to build instruments out of found and donated materials and perform a collaborative composition. Many people that work with Path With Art face crisis that may include addiction, homelessness and other traumas. It was during this project that the City of Seattle declared a state of emergency regarding the homeless crisis. This then brought up the questions of ways that the symphony can engage in homelessness and what role the symphony should play in the community. These questions eventually lead to the development of *Simple Gifts* (personal communication, April 3, 2018).

Simple Gifts

Simple Gifts is Seattle Symphony's homeless initiative, and an organization wide commitment and investment. They did not want this to be a one-time program, but a long-term focus on an important issue within their community. A handout provided by the Seattle Symphony provides the following overview of the program:

WHAT CAN AN ORCHESTRA DO TO ADDRESS HOMELESSNESS?

Our focus is on the power of music and the impact it can make on people who are experiencing stress, isolation and challenges in their lives. The Seattle Symphony began working with community partners serving individuals experiencing homelessness in 2013. What we've learned through this work is:

- Music is a universal force for inspiration and wellbeing
- Creative thinking around a work of art leads to creative problem-solving in other areas
- Having a safe environment can create a sense of stability , when so many other aspects of life feel overwhelming
- Shared experiences bridge gaps between people from different backgrounds and build deeper, authentic connections

The Seattle Symphony's *Simple Gifts* program aims to empower individuals who are experiencing homelessness to connect with their creativity; develop deeper roots in the community through service, advocacy and collaboration; spark joy and inspire hope in individuals and communities that face disproportionate amounts of hardship; and raise

awareness of the homelessness crisis that is occurring in King County. (Simple Gifts Handout, p. 1).

The original idea combined the successful community compositions with populations served by nonprofit partners, but with the underlying uncertainty of whether these ideas would be accepted within the social service community. They learned that not only were their ideas welcomed but that they had a loud and powerful voice in the community. This initiative has two components: programming and communication. They use their platform and presence in the community to shed light on the issue of homelessness in the hope that it will break down stereotypes and promote change (personal communication, April 3, 2018).

Now in their second year, *Simple Gifts* focuses on a different sub-population within the homeless community each year. The overarching purpose and goal for this initiative was to be an extremely strong ally and shed light on the issue of homelessness while also providing opportunity to change perceptions and disprove myths surrounding this population. They measure their success not just in programming for the community, but by observing engagement within the organization in monthly community service projects. Staff, board members, musicians and volunteers are encouraged to participate in these projects, Reynolds notes that in their 2016-17 over 100 people volunteered within their organization. She further explained that their nonprofit partners suggested involving themselves outside of the symphony and in closer proximity to the issue in order to become a better advocate for the cause (personal communication, April 3, 2018).

They currently work with eighteen different partners in the community that help people experiencing homelessness or housing insecurity. These evolved from *Community Connection* partners, and the symphony invited them to contribute to this initiative. These partners are a resource when developing new programs, both for content and recommendations on who they

should be working with in among the community. It was understood that the symphony would not be responsible for finding housing, but they could provide a spiritual and creative outlet for people experiencing homelessness. These collaborations have helped to shed light on the unique offerings and perspectives that each partner offers. Reynolds explains that they wanted to offer an option for them “to just be people, and not be homeless people” (personal communication, April 3, 2018).

Many of the programs now feature guest artists and artists-in-residence in addition to teaching artists, and often overlap with the afore mentioned *Community Compositions*. As was previously discussed, the symphony has begun focusing on different sub-population within the homeless community. Their 2017-18 season paired LGBTQ youth experiencing homelessness⁹ with visiting composer, Alexandra Gardner, to collaborate in the composition of a piece that would be played in the lobby of the Seattle Art Museum (Kiley, 2018). *Prism Project* is the name of this collaboration and “Stay Elevated” is the four movement composition that emerged from this nine week workshop (Kiley, 2018). The attendance was always different as many of the youth found housing, had ever changing schedules or maybe just decided not to return (Kiley, 2018).

The end result incorporated many of the unique suggestions from the participating youth, some of which included the adapted sound of a digeridoo, a tenor saxophone, the imitations of the various themes of “good morning” heard on the street, and the ringing of bells found within a library – the music reflected their love instead of previous traumas, and Kiley (2018) quotes Gardner as saying: “some were surprised that it was very sweet and beautiful — not the angry, thorny experience they expected it to be” (p. 18). Some of the goals for this program included a

⁹ The main partnership was with New Horizons, YouthCare and the Accelerator YMCA

sense of consistency for the youth, learning life skills which may include showing up on time, having a safe a productive relationship with adults. Their next season (2018-19) will focus on senior veterans that have experienced homelessness (personal communication, April 3, 2018).

Future Initiatives

Though there are plans for future programming, one area of continuous focus is equity. Reynolds adds that this needs to be a systemic change within the industry. Within the Seattle Symphony, their work with people experiencing homelessness has helped them to identify oppression and make strides in combating that. However, industry-wide, symphonies and organizations that intersect should be looking into ways for “people of color to have the same outcomes as people who identify as white” (personal communication, April 3, 2018). Reynolds adds that there is a lot of opportunity for good work to be done and partnerships to be made in the community.

5.14 Conclusion

In this past section, four professional symphony orchestras were studied: Boise Philharmonic, Eugene Symphony, Oregon Symphony and Seattle Symphony. The section not only compared community engagement programming, but also explored background and location of the symphony orchestra. Boise Philharmonic and Eugene Symphony were both similar in location and budget (Boise is Group D and Eugene, Group C – Eugene exceeds Boise’s budget by close to \$1 million). Boise has a primary focus on educational programming though they do offer community based concerts. Eugene has deep roots in their community and

this is evident in the community engagement. Their programming is extremely robust and still growing.

Oregon Symphony (Group B) has a diverse variety of programs for the community that include programs for correctional facilities, clients with cognitive disorders and many other options. Their 2017-18 season addressed important themes of environment, homelessness and immigration. Seattle Symphony (Group A) has the highest budget of the symphonies studied and while they offer many different options for the community, they have made it their focus to address the homeless crisis in their city with their *Simple Gifts* initiative. The next, and final, chapter of this research will continue to look into common themes among symphony orchestras, and will provide recommendations for the orchestra professional.

CHAPTER SIX: FINDINGS, CONCLUSIONS AND RECOMMENDATIONS

6.1 Overview

This project explored the background of the professional symphony orchestra, with the majority of focus within the United States, and continued to examine audience development strategies and the importance of diversity, equity and inclusion initiatives. The study also examined the variety of programs represented within the broad area of community engagement, which included: education, and community concerts. The main focus of this research was to identify ways in which professional symphony orchestras are engaging under-represented populations within their community. The study provides examples of many of the communities that an orchestra might choose to program for, and also narrows the focus into the Pacific Northwest with a comparative case study of Boise Philharmonic, Eugene Symphony, Oregon Symphony and Seattle Symphony. At each of these four organizations, employees at the director level or higher in community engagement were interviewed, websites were analyzed and any materials provided by the organization or found online were used (handouts, annual reports, etc.)

The research sought to answer the following questions:

2. How are professional symphony orchestras engaging under-represented populations within their community?
 - 2.1. Why should a symphony be engaging with its community?
 - 2.1.1. What are some of the issues that symphony orchestras are facing?
 - 2.2. What are the various ways of engagement and some of the programs currently available?
 - 2.2.1. What are the categories of engagement, different populations served and programs for each population?

2.3. How are professional symphony orchestras in the Pacific Northwest engaging with their community?

2.3.1. How do the programs in the region compare?

2.3.1.1. What is the structure of these programs, who are they serving and why did they choose to work with this population?

2.3.2. How does the size/budget of the symphony effect their level of engagement?

By answering these research questions, this project was able to identify the general relationship between a professional symphony and its community and what factors needed to be considered when programming for under-represented populations. This final chapter will compare findings made within the research and highlight significant similarities and differences. These findings will also look into the effects of location, culture of the city, size and budget of the organization on programming that they currently offer. This chapter will provide conclusions and recommendations for future research, and programming opportunities that have so far been overlooked by the majority of professional orchestras in the country.

6.2 Findings

Although it may not come as a surprise, many of the orchestras with the most robust programming have a higher budget. However, as was seen in previous chapters, this is not always the case. Many of the higher budget orchestras are able to focus more on the performance aspect of the organization, and less on their role within the community (see Chapter Three). However, looking back at the data from the League of American Orchestras used in Chapter Three, many of the professional orchestras in the United States have an annual budget of \$300,000 - \$2 million, and only 4% of orchestras exceed this. With that in mind, other factors

need to be taken into consideration when examining the community engagement programming among symphony orchestras of comparative sizes and budgets: where the orchestra is located, the population of the area, how many employees, the culture of the area, the age of the orchestra, and its relationship with the community.

This section will primarily focus on findings specific to under-represented populations, but it is important to identify similarities and differences in community engagement as whole. One main similarity among all orchestras regardless of size is that the most common forms of engagement are associated with education and (free) community concerts. Education and family programming often included thematic concerts, instrument petting zoos, master classes and some form of mentorship. Free community concerts were likely held at a park or another centralized location, and were open to the general public. Many orchestras also provide concerts, either full or chamber sized, at partner locations. These may include prisons, schools, retirement facilities, veteran homes, and more. These are usually no cost to the community partners.

There were also many common themes and initiatives shared by many orchestras throughout the country. The most timely initiative, specifically among orchestras interviewed (see Chapter Five), is the goal of improved diversity, equity and inclusion. This did not always directly relate to programmatic ideas within the community engagement department, but was often an organization-wide commitment. The hope is that in the near future symphonies will become more diverse; not only in their audience, but also among their board and employees. Some organizations expressed the goal of integrating diversity among music performed. This can be accomplished by commissioning new works, and also by making the small change of programming female composers, composers of all ethnicities and nationalities, and living composers in orchestras' main performance series. Diversity, equity and inclusion also involves

making existing concerts and programs accessible and equitable for all people within the community. This commonly included sensory-friendly concerts, free/reduced tickets, and materials available in multiple languages.

While many orchestras may offer a similar variety of programming, there are many unique and engaging options for under-represented populations around the United States and internationally. A common factor for this diversity, and many similarities, is simply location, and the crises or issues that may be specific to that symphony's community. A common theme around the country is the issue of homelessness, and though there may be certain areas in which this is more present it is seen nationwide. Seattle Symphony and Oregon Symphony have both identified this issue and developed programming, partnerships and projects to address the crisis. There are also many other initiatives around the United States that seek to help people experiencing homelessness in their community.

Another area that is widely focused on is music and healthcare, and initiatives in this area commonly focus on clients with cognitive/memory disorders, as well as children and adult patients in local healthcare facilities. Often these programs partner with music therapists in the area, although in some cases musicians in the orchestra receive training and become certified to be artists in the healthcare facilities. The level of engagement and therapeutic content is often contingent on resources within that specific community, and can be narrowed down further to concerts, music therapy sessions, and/or a hands-on approach.

6.3 Recommendations

Current and emerging orchestra administrators should continue their focus on diversity, equity and inclusion. Although there are opportunities and need for new or additional

programming which may address a new and pressing issue within the community, there are often changes that can be made internally to current programs which allow them to be more accessible, diverse and equitable. This not only preserves resources, time and money but encourages participation with the symphony. Many organizations are creating committees or sub-committees within their board of directors which help to address ways that the organization can focus on becoming more diverse, equitable and inclusive.

Orchestra professionals should also look outside of their organization and observe programming throughout the country. There are common issues and under-represented populations throughout the country, and the world, and it makes sense to reach out to these organizations to learn best practices and glean recommendations. While one program may not specifically work in another location, they could provide insight on successes or struggles they faced when creating their program or working with a specific population. There is no need to re-invent the wheel. It is also encouraged to develop relationships with social service nonprofits within the community prior to creating a new program. The symphony is often not the expert in these areas, but can offer resources and platform that can help address an issue in the community and improve the quality of life for the clients of these organizations.

While there are countless opportunities for many under-represented populations around the world, there are some communities that deserve more attention. Surprisingly, there were not very many programs or opportunities for clients with disabilities, veterans and current military, and refugees/immigrants. It was common for concerts to be held on Veteran's/Memorial day, free/reduced tickets or open rehearsals. Yet it was not common to see programming that address issues faced by these populations. Additionally, there is a need for ongoing research in this area as there was not a lot of literature available on community engagement with symphony

orchestras, and more specifically engagement that was involving under-represented populations. There was an abundance of information and research regarding the various approaches, methods and best practices for audience development and education. It is important that orchestra professionals and academics continue looking into the role of the symphony in the community, programming for under-represented populations and integrating diversity, equity and inclusion within the symphony orchestra. Further research is needed in these areas specifically.

6.4 Conclusions

A symphony orchestra is a 501c3 nonprofit, created of and for the community. They are meant to fill a need that the government and for-profit businesses are unable to help with. Symphonies are no longer meant to only perform, they need to work with the community in which they are housed. This will also help with other issues the symphony currently faces: relevance and revenue. As was explored in previous chapters, this is an ongoing struggle with professional symphony orchestras of today. As they immerse themselves more in the community they will become more relevant, and donors will notice the positive work these orchestras are doing and choose to support them financially. Although these reasons should never be the driving force for choosing to help the community, they are possible outcomes of successful community engagement.

This master's research project can, and should, be used as a resource for emerging and current orchestra professionals. It provides both a broad and narrow overview of community engagement programming throughout the United States and internationally. The focus is on engaging under-represented populations and presents a variety of populations served and programmatic initiatives. Professionals may use this as a reference when developing and

implementing programs for their organization. This research is both important and relevant because the professional symphony orchestra's relationship with their community is evolving. It is necessary that symphonies begin to work with their community to serve under-represented populations and help with any issues the community may be facing.

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INTERVIEWS

Monica Hayes, Oregon Symphony, Education and Community Programs Director
March 13, 2018 – Portland, Oregon

Katy Vizdal, Eugene Symphony, Education and Community Engagement Director
March 23, 2018 – Eugene, Oregon

Lauren Folkner, Boise Philharmonic, Education Director
March 26, 2018 – Video Conference

Laura Reynolds, Seattle Symphony, Vice President of Education and Community Engagement
April 3, 2018 – Seattle, Washington

APPENDICES

Appendix A: Research instruments – Interview

Case Study:

Position of Interviewee:

Date: Interview Location:

Interviewee details:

Consent: Oral Written (form) Audio Recording OK to Quote
 Thank you sent

Notes of interview context:

Semi-Structured Questions:

What are the current community engagement programming your organization offers?

Who is being engaged with these programs?

How are these programs structured, and who are your partners?

What are the proposed outcomes of these programs?

Why did you choose to serve this population?

Appendix B: Recruitment instruments

Date

Lauren Watt
2465 Lakeview Dr. #202
Eugene, Or 97408

Dear <POTENTIAL INTERVIEWEE>:

You are invited to participate in a research project titled *Engaging Under-Represented Communities: A Comparative Analysis of Professional Symphony Orchestras*, conducted by Lauren Watt from the University of Oregon's Arts and Administration Program. The purpose of this study is to explore how professional symphony orchestras are engaging with their community, and more specifically with under-represented populations.

You were selected to participate in this study because of your position with <NAME OF RELEVANT CASE STUDY ORGANIZATION> and your experiences with and expertise pertinent to community engagement in <CASE STUDY CITY>. If you decide to take part in this research project, you will be asked to participate in an in-person interview, lasting approximately one hour, in winter or spring of 2018. If you wish, interview questions will be provided beforehand for your consideration. Interviews will take place at <NAME OF ORGANIZATION>, or at a more conveniently located site. Interviews will be scheduled at your convenience. In addition to taking handwritten notes, with your permission, I will use an audio recorder for transcription and validation purposes. You may also be asked to provide follow-up information through phone calls or email.

If you have any questions, please feel free to contact me at 503-756-2176 or lwagner5@uoregon.edu or Dr. Patricia Dewey Lambert at pdewey@uoregon.edu

Thank you in advance for your interest and consideration. I will follow up with you soon by email and/or telephone to answer any questions you might have and to hopefully schedule a time to meet for an interview.

Sincerely,

Lauren Watt

Appendix C: Consent forms

Research Protocol Number: 12042017.016
Engaging Under-Represented Communities:
A Comparative Analysis of Professional Symphony Orchestras
Lauren Watt Principal Investigator
Arts and Administration Program
School of Planning, Public Policy and Management
University of Oregon

You are invited to participate in a research project titled *Engaging Under-Represented Communities: A Comparative Analysis of Professional Symphony Orchestras*, conducted by Lauren Watt from the University of Oregon's Arts and Administration Program. The purpose of this study is to explore how professional symphony orchestras are engaging with their community, and more specifically with under-represented populations.

Symphony orchestras are expanding their reach within the community from being viewed as a performing group to an essential part of the community. This research explores the many areas of community engagement, including a brief overview of audience development and education. The main focus of this study is ways in which a professional symphony orchestra might be engaging with under-represented populations. Under-represented populations can be seen as populations that may not have access or immediate desire to get involved with their community's orchestra. The research will be structured as follows: 1. An overview of the history of the symphony and why community engagement is important, 2. An overview of community engagement, education and audience development, 3. Website and online content analysis and categories of engagement, 4. Comparative case study, 5. Conclusion. The knowledge gained from this study will serve as a handbook of best practices and opportunities with community engagement.

You were selected to participate in this study because of your leadership position with <NAME OF RELEVANT CASE STUDY ORGANIZATION> and your experiences with and expertise pertinent to community engagement in <CASE STUDY CITY>. If you decide to take part in this research project, you will be asked to participate in an in-person interview, lasting approximately one hour, in winter or spring 2018. In addition to taking handwritten notes, with your permission, I will use an audio recorder for transcription and validation purposes. You may also be asked to provide follow-up information through phone calls or email.

Any information that is obtained in connection with this study will be carefully and securely maintained. All research records will be stored on a password-protected computer, and hard copies of documents will be stored in a locked file cabinet. Audio recordings will be immediately downloaded to password-protected storage and erased from the audio device. Research records will be retained through completion of this research project for validation purposes and shortly past publication of the master's research project; research records will be destroyed one year after completion of the study. Only the principal investigator and the faculty research adviser will have access to these records.

There are minimal risks (loss of privacy and/or breach of confidentiality) associated with participating in this study. To maintain credibility of the research, I intend to identify participants and use quotes from participants in the final publication. Your consent to participate in this interview, as indicated below, demonstrates your willingness to have your name used in any resulting documents and publications and to relinquish confidentiality. You will have the opportunity, if you wish, to review and quotes and paraphrasing of your statements prior to publication. It may be advisable to obtain permission to participate in this interview to avoid potential social or economic risks related to speaking as a representative of your institution. Your participation is voluntary. If you decide to participate, you are free to withdraw your consent and discontinue participation at any time without penalty.

I anticipate that the results of this research project will be of value to symphony orchestras as a whole, especially in the Pacific Northwest region. However, I cannot guarantee that you personally will receive any benefits from this research.

If you have any questions, please feel free to contact me at 503-756-2176 or lwagner5@uoregon.edu, or Dr. Patricia Dewey Lambert at pdewey@uoregon.edu. Any questions regarding your rights as a research participant should be directed to the Office for Research Compliance Services, University of Oregon, Eugene, OR 97403, (541) 346-2510.

Please read and initial the following statements to indicate your consent. Because interviewees differ in their wishes for information to be collected during the interview and in reviewing the information before publication, please specify your understandings and preferences in the list below:

_____ I understand that I will be identified as a participant in this research project.

_____ I understand that my name and occupation may be used.

_____ I consent to the use of note taking during my interview.

_____ I consent to the use of audio recording during my interview.

_____ I consent to the potential use of quotations from the interview.

_____ I consent to the use of information I provide regarding the organization with which I am associated.

_____ I wish to have the opportunity to review and possibly revise my comments and the information that I provide prior to these data appearing in the final version of any publications that may result from this study. I understand that the principal investigator will send me by email a copy of all of the quotes and paraphrases that are directly attributable to me, and that I will have the opportunity to approve and/or revise these statements by a clearly defined deadline.

Your signature indicates that you have read and understand the information provided above, that you willingly agree to participate, that you may withdraw your consent at any time and discontinue participation without penalty, that you have received a copy of this form, and that you are not waiving any legal claims, rights or remedies. You have been given a copy of this letter to keep.

Print Name: _____

Signature: _____ Date: _____

Thank you for your interest and participation in this study.

Sincerely,

Lauren Watt
lwagner5@uoregon.edu