Developing Your Diversity Plan

June 10, 2016
9:00am-10:15am

Presenters:
Jessica Schmidt, Independent Consultant
Susan Stucker, NJSO
Bob Wagner, NJSO
Session Focus:

- Presentation of one planning framework via the current story of the NJSO
- Exploration of transferrable lessons learned

Influenced by experiences at the Pittsburgh Symphony Orchestra (2007-2012)
Session Agenda

1) Why D&I Planning?
2) New Jersey Demographic Context
3) New Jersey Symphony Orchestra D&I Planning
4) Transferrable Learnings
5) Questions/Discussion
1) Why D&I Planning?
**Benefits of D&I Planning**

* Builds internal “understanding, ownership, and allies”
* Avoids “program only” D&I efforts
* Addresses the interconnected whole of the organization
* Creates a proactive and sustainable D&I culture
* Allows the organization to share unified plans, credibly and consistently
“The research team discovered that much of the literature is emergent in nature. The problems are being identified from many different points of view. Consensus on the nature of the problem is less defined. Proven solutions are difficult to find. Even as this document went to press, new reports were published and new initiatives were being launched.”

Source: 2016 Los Angeles County Arts Commission Cultural Equity and Inclusion Initiative Literature Review, Executive Summary  Authors: Kidd, Ruskin, with assistance from Agustin
Focus on D&I discussion within and beyond the sector

- Rise of D&I-related programs
- Increasing philanthropic focus on D&I
- Lack of strategic frameworks for this work within the sector
Redefine the ROI

* How can we serve as leaders in D&I efforts rather than followers?
  * Own our sector’s unique nature, needs, opportunities, and challenges
  * Don’t restrict potential areas for success
  * Consider multiple bottom lines: Artistic/Public Value/Financial/Staff talent
2) New Jersey’s Demographic Context
New Jersey Demographics

* Total population of 8,958,013

* 3rd most diverse state
  - 69% White
  - 14% Black/African American
  - 9% Asian
  - 8% Multiracial/Other
  - 19% Hispanic/Latino

* 57% non-Hispanic/Latino white
  (In 1970, 85%)

Source: U.S. Census Bureau
Of the 50 States, NJ has...

The largest population of Peruvian Americans
The 2nd largest population of Cubans

By percentage of population:
The 2nd highest Jewish population
The 2nd highest Muslim population
The 3rd highest Asian population by percentage
  The largest % Asian Indian population
  The 3rd largest Korean population
The 4th largest Filipino population
The 4th largest Chinese population

56.4% of NJ children under the age of 1 belong to racial or ethnic minority groups

Source: NJ Databank (njdatabank.newark.rutgers.edu), a project of the School of Public Affairs and Administration, Rutgers University Campus at Newark
Projected NJ Population by Race

<table>
<thead>
<tr>
<th>Year</th>
<th>White</th>
<th>Black</th>
<th>Asian</th>
<th>Latino</th>
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<tbody>
<tr>
<td>2013</td>
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<tr>
<td>2043</td>
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Source: U.S. Census Bureau
The population age 65 and older is projected to almost double from 43.1 million in 2012 to 83.7 million by 2050.

Those age 85 and older is projected to grow from 5.8 million to 17 million.

By 2050, seniors will out number school-age children.

Source: U.S. Census Bureau
* African American buying power has increased 86% since 2000 (to $1.1 trillion)
* Native American buying power has increased 149% increase since 2000 (to $100 billion)
* Asian buying power rose to $770 billion in 2014
* Hispanic buying power has increased 155% since 2000 (to $1.3 trillion)
  * As of 2014, one of out every six people in the U.S. claims Hispanic origin.

Source: 2014 Multicultural Economy Report from the Selig Center for Economic Growth at the University of Georgia Terry College of Business.
The 2014 buying power of the LGBT market in the US was worth an estimated $884 billion

Source: Witeck Communications

* 55% of LGBT consumers will choose to do business with companies that are committed to the diversity/equal treatment of the LGBT community
* 70% of LGBT adults stated they would pay a premium for a product from a company that supports the LGBT community

Source: Community Marketing Inc. & Harris Interactive
3) New Jersey Symphony Orchestra D&I Planning
NJSO Situational Analysis

* Changes at the NJSO:
  * New Music Director
  * Change in board leadership
  * President and CEO search

* Changes in the orchestra and ECE programs:
  * Reduction in orchestra positions over time; less opportunity to build on-stage diversity
  * Youth Orchestra – growing participation
  * Changes in state, national demographics
Unique Traits of the NJSO

* 29 week orchestra
* Players from across the region
* State-wide representation
NJSO: Years of Building D&I Momentum

* League Task Force
  * Board/Musician/Staff alignment
  * Internal understanding of “why” around D&I
* Ally-building process
* Governance connection
* Key moment= funding support
NJSO Response

* Governance Committee
* Board D&I diversification opportunities
* Emerging philanthropic focus on D&I
* Create D&I Task Force
NJSO D&I Task Force

* Task Force engages external advisor, independent consultant, Jessica Schmidt
  * Facilitated exploration
  * Challenge: prioritization
NJSO D&I Task Force

* Co-Chair Curt Fields - Board
* Co-Chair Robert Wagner - Musician
* Joanna Farrer - Musician
* Bryan Hernandez-Luch - Musician
* Marshell Jones Kumahor - Staff
* Cathy Levin - Staff
* Elin Mueller - Board
* Susan Stucker - Staff
* Christine Terhune - Musician
* Penny Vance - Board

* Jessica Schmidt - External Advisor
To enrich lives through a passion for musical excellence and a commitment to New Jersey, *its people and its communities.*
NJSO Proposed Diversity Planning Process

STAKEHOLDER INTERVIEWS
- Internal parties who have the power to affect change
  - NJSO Board
  - NJSO Musicians
  - NJSO Staff
- Build "understanding, ownership, and allies" (UOA)

DATA SYNTHESIS (JS)
- Determine dominant themes across:
  - Stakeholder interviews
  - Individual interviews
  - Additional external and internal data

MINI-RETREAT
- Present data and themes
- Discuss and determine shared priorities, objectives, and action items

DEVELOP CONCISE DIVERSITY PLAN (JS)
- Summarization of group thought
  - Objectives
  - Action items
  - Metrics
  - Resources needed

VET PLAN AND IMPLEMENT
- Shared ownership
  - NJSO Board
  - NJSO Musicians
  - NJSO Staff
Stakeholder Interviews
Stakeholder Interviews

Participants included:

- 5 NJSO Board Members (4 of whom are members of the NJSO Executive Committee)
- 7 NJSO Musicians (including Orchestra Committee Chair)
- 19 NJSO Staff Members (including Interim President and CEO)
- 4 External Members of the Education Committee
- Incoming NJSO Music Director, Xian Zhang

A total of 36 individuals were engaged via the internal stakeholder interview process
NJSO D&I Stakeholder Conversations: Key Consideration Areas

Infrastructure
How does the NJSO’s infrastructure currently reflect D&I? How might it change to better support D&I?

Engagement/Pipeline
How does the NJSO’s engagement and pipeline strategy currently reflect D&I? How might it change to better support D&I?

Programming
How does the NJSO’s programming currently reflect D&I? How might it change to better support D&I?

Cultivation/Recruitment
How does the NJSO’s recruitment and cultivation strategy currently reflect D&I? How might it change to better support D&I?

Retention/Stewardship
How do the NJSO’s retention and stewardship activities currently reflect D&I? How might they change to better support D&I?

“Diversity = The Mix   Inclusion = Making the Mix Work”

NJSO Definition of Diversity Includes:
race/ethnic background, age, gender, geography, socioeconomic status, physical and mental ability, sexual identification, family status, religion/faith
Stakeholder Interviews

Data Synthesis
Result of Internal Stakeholder Interviews

* 13 Page Summary Report
* 8 Emerging Action Areas
NJSO Diversity and Inclusion Planning

- Propel D&I Momentum from Within the Board
- Create Supportive Entry Pipelines - Onstage D&I
- Position NJSO Education and Community Engagement as an Internal D&I Model
- Capitalize on State Breadth and Newark Depth
- Create Space and Resources for Staff R&D
- Build D&I-Focused Audience Development and Engagement Opportunities
- Develop Internal D&I Learning Opportunities and Resources
- Share the "Wins"/Align Internal Efforts

March, 2016
Jessica Schmidt
D&I Task Force polled for input
Written by a small group
Current draft
  Discussed within the NJSO D&I Task Force
Pending Executive Committee approval
Diversity and Inclusion Focus:

The NJSO believes that the inclusion of a broad range of experiences and perspectives will strengthen our organization by prompting us to react and think differently, approach challenges and solve problems differently, and seek new opportunities. Diversity is, therefore, about a diversity of thought. We believe that superior organizational performance requires tapping into a variety of life experiences and perspectives.

In keeping with the established mission of the NJSO, we also believe that our Orchestra needs to become more relevant to more people. For the NJSO to remain vital, we must be perceived as an authentically diverse and inclusive institution – onstage, on staff, and within our governance.
Diversity and Inclusion Commitment:

Achieving diversity and inclusion in our organization requires leadership commitment from our Musicians, Board and Staff. This commitment must extend over time, with an understanding that diversity and inclusion is an ongoing process. Therefore, the NJSO pledges to:

* Create a culture that consistently values diversity and inclusion, holding it as a central consideration in artistic and institutional decision-making;
* Build greater understanding of, and respect for, diversity and inclusion within the NJSO;
* Promote diversity and inclusion within all aspects of our organization so that the NJSO reflects and welcomes the rich diversity of those living in our New Jersey communities.
Diversity and Inclusion Definition:

For the New Jersey Symphony Orchestra, a commitment to diversity represents an intention to honor and actively seek the inclusion and involvement of the broadest possible representation of our community. This includes consideration of race, ethnicity and cultural background, gender, sexual orientation, age, socio-economic status, varying abilities, education, geography, family status, and religion.
Vision Statement - EARLY DRAFT

* The NJSO will attract and retain an audience, staff, musicians and board that better reflects the diversity of our communities.
* The NJSO will have strong and enduring connections with diverse communities throughout New Jersey.
* The NJSO’s offerings will appeal and be relevant to many diverse communities within New Jersey.
Stakeholder Interviews

Data Synthesis

Mini-Retreat
Primary Retreat Goals:

- Identify and recommend priority action areas for NJSO D&I work
- Begin discussion and recommendation of potential action items within priority areas
NJSO: May 20 Retreat
Key Components

* Pre-retreat “homework”
* Small group breakouts
* Small group report-outs
* Facilitated full group discussion
Stakeholder Interviews | Data Synthesis | Mini-Retreat | Develop Concise Diversity Plan | Vet Plan & Implement
Where We Will Go, Next...

- Synthesize retreat data into a short summary document
  - Prioritize action areas
  - Pull specific action items
  - Discuss necessary resources and outcome measurement
  - Further review
4) Transferrable Learnings
Learning is ongoing!

Communication is central to the process
  * Be proactive
  * Build communication channels before “something happens”
  * Without communication, it can be easy to jump to negative assumptions during a time of unknowns/evolution

Leave space for dialogue
  * Allow time for information to be processed in a deep and thoughtful way

Accept the long, slow process of building engagement
  * Bring people along as individuals
Transferrable Learnings - Susan (Management Leadership)

- Allow time for this subject matter to “sink in”
- Create shared ownership - board, musicians, staff
- Involve the Governance Committee
- Financial support is necessary for this work to commence
- Create broad buy-in to build sustainability
- Look for existing allies within the organization
- Don’t underestimate the time or resource commitment necessary to move this work forward
- Involve an external facilitator/consultant
Transferrable Learnings - Jessica (External Facilitator)

- Define diversity and inclusion broadly
- Expect “delightful detours”
- Build opportunities for meaningful participation
- Value the power of individual conversations
- Realize that every organization’s D&I story will be different
- Set the long-term goal of culture change
- Look for internal wins and outstanding models already present within your orchestra
“Wins” via the NJSO D&I Planning Process

* Universal institutional interest
* Power of bringing board, musicians and staff together for conversation
* Recognition that D&I is part of the DNA of the organization
Additional Resources

* Theater Communications Group
* LA County Arts Commission Literature Review (March, 2016)
* BBC Diversity and Inclusion Strategy (April, 2016)
* Americans for the Arts- Cultural Equity Statement (May, 2016)
* Vu Le’s Blog
5) Questions and Discussion
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