

"The Changing Nature of Volunteerism" from the National Task Force Report of the American Symphony Orchestra League *Americanizing the American Orchestra*

Connie Pirtle

INTRODUCTION

Founded in 1942, the American Symphony Orchestra League is the national nonprofit service and educational organization dedicated to strengthening symphony and chamber orchestras. The League provides artistic, organizational, and financial leadership and service to the music directors, musicians, direct service and governance volunteers, managers, and staff who comprise its more than 800 member orchestras.

In 1991 the American Symphony Orchestra League launched an ambitious program of research and study, "The American Orchestra: An Initiative for Change," to analyze the health of the orchestra industry. Through the Initiative the League has created a nationwide forum for managing change in the American orchestra world. Reports released at two successive annual conferences of the League, *The Financial Condition of Symphony Orchestras* (1992) and *Americanizing the American Orchestra* (1993), have received widespread media attention not only in the United States and Canada, but also in many countries abroad.

Americanizing the American Orchestra collects in its 200 pages the deliberations of a National Task Force that the League assembled in seven weekend conferences in 1992-1993. Orchestra trustees, conductors, composers, musicians, direct service volunteers, managers, students, teachers,

university officials, and hospital administrators gave freely of their time and expertise to discuss the world of the American symphony orchestra.

The nationwide Task Force of 156 people encompassed a diversity of age, gender, race, and occupation that contributed to lively and frank debates of the orchestra field's most urgent topics: the music itself, cultural diversity, the relationship of musicians and the orchestral institution, the concertgoing experience, the orchestra as music educator, developing orchestra leadership, and the changing nature of volunteerism.

In her column in the September/October 1993 *SYMPHONY*, the League's bi-monthly magazine, League President Catherine French emphasized the unique importance of volunteerism to the American symphony orchestra:

One of the questions raised by those hearing about the Report for the first time was, "Why 'Americanize'? Shouldn't orchestras be looking to 'internationalize'?" . . . The Report values highly the rich orchestral repertoire and tradition of European cultures embodied in our institutions. So why 'Americanize'? The Task Force Report challenges us to see within ourselves, our orchestras, and our communities those attributes that are uniquely American and to view these qualities as assets to be developed.

Connie Pirtle is the Director of Volunteer Services for the American Symphony Orchestra League. She also serves as Vice Chair for Region III for the AVA. Ms. Pirtle is a native of Texas, studied business administration at Oklahoma State University and has travelled extensively as well as having lived in Rome where she was an art tour docent and co-editor of the American Women's Association of Rome newsletter.

Permission to reprint Chapter 6 of *Americanizing the American Orchestra* is granted by the American Symphony Orchestra League, Catherine French, President.

An essential quality that distinguishes the American orchestra from its counterparts abroad is its voluntary nature. Volunteers are responsible for the governance and support of our orchestras. All of us who are orchestra professionals work for volunteers, and a substantial portion of our paychecks is provided by voluntary contributions.

We have no ministry of culture. There is no official Orchestra of the United States. Our government has not mandated the existence of the (currently 1600) orchestras found throughout the United States. An orchestra can flourish in any American community where the orchestra and its music have captured the interest, imagination, and enthusiasm of people who voluntarily choose to support it.

The Task Force group on volunteerism explored answers to the question, "What institutional changes must occur in order for orchestras to utilize volunteer resources in more visionary and effective ways?" Their deliberations, in Chapter Six of the Report, raised questions and provided orchestras with a frame of reference as they adapt to the rapidly changing society of late 20th-century America.

THE CHANGING NATURE OF VOLUNTEERISM

American orchestras historically have been voluntary organizations: they are governed by volunteers and much of the work traditionally has been carried out by volunteers. Despite the growing professionalism over the years in the management of American orchestras, orchestras still rely heavily on the unique American spirit of volunteerism. A host of individuals in communities across the nation give of their time, talent, and expertise at no charge to the orchestra. They may be board members, volunteer association members, students, corporate employees on loan for a day or for a year, or retirees helping out in the orchestra office.

These orchestra volunteers raise money, make governance decisions, take

tickets, show people to their seats, do office work, organize education programs, present programs about the orchestra in schools and community locations, plan and execute promotional activities, train other volunteers, provide legal and accounting services, organize and carry out social and hospitality functions, and much more. In orchestras large and small throughout the country, volunteers provide an invaluable and irreplaceable fuel for orchestra operations.

Any successful redefinition of the orchestra would be incomplete without a long and hard look at the role of volunteers. How can orchestras ensure that volunteers will continue to provide this level of service and devotion? Are orchestra volunteers being utilized to their fullest potential? Are they well integrated into the structures and operations of the orchestra? Are the volunteer leaders of the future being identified and nurtured today? Does the orchestra's relationship with its volunteers serve organizational goals for improved and broadened community relations? Does the range of volunteers in the orchestra, from board members to occasional envelope-stuffers, reflect the population of the orchestra's home community? Are volunteers a peripheral or integral part of the orchestra's decision-making process?

Three principles shape the Task Force's review of orchestra volunteerism:

1. Volunteers are an important asset, especially as orchestras weather institutional and financial challenges. Those orchestras that can harness the full potential of volunteer resources in their communities will have the best chance of remaining vital and viable institutions in the future.
2. Volunteers are most effective in their support for the orchestra when their efforts establish stronger and broader links with the community in which the orchestra operates.
3. Volunteers should not be taken for granted—making the development

and maintenance of an effective volunteer program a high priority for orchestra leaders will benefit the entire operation.

HISTORICAL AND CONTEMPORARY CONTEXT

The history of orchestra volunteerism is reflected in today's volunteer structures and roles, and underlies many of the difficulties orchestras face in bringing volunteerism into step with the realities of life in the 1990s.

Most orchestra volunteer groups were formed at a time when women had a limited range of opportunities for personal development, accomplishment, and recognition. Through organizations such as orchestra guilds, garden clubs, and hospital auxiliaries, women were able to use their knowledge and skills in service to the community. Many long-time orchestra volunteers report that their orchestra experience has been among the most personally rewarding of their lives, providing access to people and responsibilities that otherwise would have been closed to them.

Then as now, orchestras called upon these volunteers to help them meet financial challenges by selling concert tickets and raising money. True to the social values of their time, the volunteers positioned themselves to complement the work of their husbands, who were often the orchestra's board members, patrons, musicians, and conductors. The membership of their volunteer associations reflected that segment of the community the orchestra considered its constituency: upper-income families of European descent.

The place of volunteers in the structure of orchestral institutions developed naturally out of the roles and responsibilities assigned to them. Whether incorporated as a separate organization or operating within the orchestra association as a committee, volunteers usually were, and still are, treated as subsidiary rather than as decision-making partners with the board,

musicians, and staff. This model was replicated across the nation as new orchestras in growing cities patterned themselves after older, more established orchestras.

The environment for volunteerism in America has changed dramatically, making the traditional orchestra model of volunteerism an anachronism. For example, as indicated earlier in this report, "minority" populations now comprise the majority in 15 of the nation's 28 largest cities. Yet, the cadre of orchestra volunteers remains largely white, affluent, and overwhelmingly female.¹ Between 1960 and 1989, while the married female population employed outside the home grew from 13.9 to 57.8 percent,² most orchestra volunteer associations continued to look for long-term, full-time commitments from their volunteer leaders and to hold most meetings during the business day. The result has been predictable and increasingly common: while volunteerism throughout the nonprofit sector—especially among the baby boom generation—is growing,³ orchestras find themselves with an aging, shrinking pool of persons willing to volunteer.

Volunteer resources as traditionally conceived are becoming less available to orchestras at a time when orchestras need them more than ever. Volunteers not only donate their time both to save money and raise money for orchestras, they also represent a vital link between the orchestra and the people in its community.

THE ISSUES

The Task Force has identified five fundamental issues regarding volunteerism and the American orchestra: (1) the definition of an orchestra "volunteer"; (2) gender, race, and class distinctions in orchestra volunteerism; (3) answering the question, "Why the orchestra?"; (4) valuing the orchestra volunteer; and (5) integration of the volunteer into the orchestra's operation.

1. *Defining the orchestra volunteer.* The traditional definition of volunteers derives

from the historical model discussed above. Usually, "volunteer" is the label given to a person, often in an allied volunteer association, who provides direct services to the orchestra, such as fund-raising, hospitality, and ticket sales.

This definition is too limited because it does not encompass other groups of people who bring their talents to bear on orchestra problems and needs. It forces volunteers onto the narrow path of joining the volunteer association, a path that may not meet their individual needs. For example, the association may require dues that the potential volunteer cannot afford; it may require long-term involvement projects, when the potential volunteer only has time for a short-term, limited involvement; or the association may emphasize social activities that do not interest the potential volunteer. It also perpetuates an ultimately dysfunctional separation between volunteer decision makers on the board and the volunteer "worker bees" who carry out the decisions of others. Therefore, the Task Force proposes a new, broader definition:

Orchestra volunteers include all individuals or groups who give their time or expertise to orchestras without financial compensation.

This definition includes three distinct types of volunteers, based on their role within the organization:

(a) *Governance volunteers.* Members of the orchestra's board of trustees, or board of governors, or board of directors, are volunteers. They serve without compensation; they give their time, their expertise, and often their money, for the cause of the orchestra. They are an important connection to the community, as are all volunteers, and it is beneficial to the orchestra when they and other volunteers reflect as much as possible the composition and interests of that community. They have many of the same needs as other volunteers, including a need for information about the orchestra, a need for training to enable them to carry out their roles most effectively, and the need to in-

tegrate their involvement with the orchestra into already busy lives. Their role in governance does give them different responsibilities and needs from other volunteers. Those needs and responsibilities can be met without bestowing on the governance volunteer special status or value that causes resentment or impedes open communication in the organization. Governance volunteers are not *better* than other volunteers—they just have *different* roles and functions.

(b) *Direct-service volunteers.* The direct-service volunteer comes to the orchestra in many different ways and provides a wide variety of services. Many direct-service volunteers take on a heavy load directing orchestra projects and managing activities. They can be very valuable, providing special expertise and organizational know-how, as well as the human resources necessary to carry out orchestra programs and projects.

In many orchestras, direct-service volunteers work through volunteer associations, often taking on major fund-raising goals. Indeed fund-raising is often the sole mandate given to the orchestra volunteer association by the board and management, who depend on the association's large annual contribution to the operating budget.⁴ These volunteers are judged—by boards, management, and themselves—on the basis of their ability to meet often ambitious goals, even though the volunteers sometimes play little or no part in setting them. Interaction of volunteers with musicians and artistic staff is usually confined to a hospitality function.

A peculiarity of most direct-service volunteer associations is that they often require members to pay dues and/or purchase orchestra subscriptions. The dues are used to support the costs of running the volunteer association, with the excess of receipts over expenditures often contributed to the orchestra at the end of the fiscal year. The requirement to purchase subscriptions is seen as a means of ensuring that volunteer association members

have a clear and committed connection to the orchestra and its mission. In addition, many orchestra volunteers are expected to purchase tickets to expensive galas and fund-raising events, as well as contribute individually to the annual fund campaign. These expenditures must be added to the normal costs incurred by a volunteer (parking/transportation, time, food, etc.), potentially making orchestra volunteer service an expensive proposition.⁵

Direct-service volunteers may also come to the orchestra outside of a dues-paying association structure. They might be members of a volunteer usher corps, participate in the annual fund drive as telemarketers, participate in a radiothon, work in the management office, staff a special event, execute a marketing study, or organize and carry out promotional activities. Direct-service volunteers can even be orchestra musicians or staff engaging in uncompensated activities related to or on behalf of the orchestra. The participation of other volunteers may be organized by either the orchestra staff or the volunteer association members.

(c) *Group volunteers.* Groups of all kinds can be a source for orchestra volunteer labor. Companies, corporate volunteer councils, civic groups, sororities and fraternities, student volunteer councils in universities and high schools, Retired Senior Volunteer Programs,⁶ unions, and trade associations are all examples of groups that take on volunteer projects, especially short-term projects. Taking a day to beautify the grounds of a concert hall or assemble a mass mailing, hosting a children's day, or making telephone calls to sell the subscription series—such clearly defined and limited tasks are ideal for group volunteers.

2. *Gender, age, race, and class distinctions:* The old, narrow definition of the orchestra volunteer has tended to accentuate differences among people instead of reinforcing the common interest volunteers and potential volunteers have in the orchestra and its music. The dichotomy be-

tween the governance and direct-service volunteer has fostered stereotyped gender roles, with men taking the power positions on the board, and women fulfilling the front-line volunteer functions with little involvement in orchestra decision making. The gender stereotyping works the other way as well, preventing men from working comfortably into female-dominated volunteer structures.

Similarly, the dominance of older people in the volunteer organizations has served as a barrier to bringing in "new blood." The old guard may not have the contacts in the younger generation; the volunteer association may not be recruiting actively among younger people; and activities may be incompatible with the two-career families common in the "baby-boom" generation.

Similar distinctions may be at work in regard to race and class. The orchestra and its volunteer association often have an image of exclusivity. Requirements for volunteers to pay dues and buy subscription tickets may reinforce that image, as may traditional programming and social functions that ignore the increasingly diverse communities in which orchestra exist. Some of the fastest-growing sectors of the volunteer work force are among African Americans and Latinos.⁷ If volunteer associations and orchestras seek to attract only more people like themselves, then they are ignoring a rich field of volunteers with the potential for great growth. If they attract new volunteers and then do not utilize their talents and expertise effectively, or if they perpetuate class distinctions within the orchestra by valuing some volunteers more than others (based on ability to contribute money), then dissatisfaction and resentment can hurt the orchestra's standing in the community.

3. *Why the orchestra?* In the realm of volunteerism this question has several levels. First, it is the question that potential volunteers inevitably ask themselves: "Why should I spend my time working

for the orchestra?" This question begs the larger one of the orchestra's standing in the community at large. Competition is growing among nonprofit organizations of all types for the resources of volunteers. According to the Internal Revenue Service, there are 70 percent more registered nonprofits in the United States today than existed in 1968. Many of these groups represent urgent social causes such as homelessness, drug and alcohol abuse, and AIDS.

Previous chapters have discussed the benefits of redefining the orchestra's role in the community in terms of broad educational and social goals while retaining the essential artistic mission. In order to attract new volunteers, orchestras may need to examine critically how they are seen in their communities. Have orchestras proven to their communities that they should be supported? Are symphony orchestras important to the people they would like to attract as volunteers? How would an orchestra representative answer the questions: "If I work for the orchestra, am I not subsidizing people with a lot more money than I have to go and listen to music? Is the orchestra fulfilling a larger artistic and social mission in the community that I can support?"

Volunteers often truly represent the public the orchestra is reaching, with the profile of volunteers looking very much like the profile of the orchestra audience. And, if the volunteer pool does not represent the publics the orchestra is trying to reach, it will be more difficult to bring in new audiences. An orchestra wishing to expand its educational activities can benefit from the involvement of individuals from the educational community or from parent groups. Success in such initiatives helps orchestras expand the base from which volunteers are drawn.

Any volunteer pondering, "Why the orchestra?" might also ask some more self-interested questions: "How will volunteering for this orchestra benefit me? What will I learn about the orchestra and about music? What satisfaction will I

draw from this experience? Will I feel appreciated? Will I feel comfortable? Will I meet interesting people and do interesting things? What special benefits will come from volunteering? What exactly will my job be? Will I receive training to do that job? How much will it cost me to volunteer? What commitment of time will I have to make? Will my time be well utilized?" The more answers the orchestra can give to such questions and the more tailored to each individual's needs those answers are, the more successful recruitment and retention efforts will be.⁸

"Why the orchestra?" is thus a question tied inevitably to the future of orchestra volunteerism. Part of the answer lies in recognizing the positive attributes orchestras have to offer potential volunteers. Indeed, each orchestra reviewing its volunteer policies and programs will find it valuable to inventory the assets it brings to the volunteer arena.

These assets can include:

Musical excellence. Ultimately, the enthusiastic and effective volunteer believes in the essential mission of the orchestra. The quality of the product makes the volunteer feel special and privileged to participate. "That exquisite music," as one Issue Forum participant put it, can be the greatest motivator for a volunteer.

The orchestra's standing in the community. Often an orchestra is one of the cornerstones of cultural life in a community, giving it credibility and wide access to people and resources.

People. Intelligent, creative, and stimulating people from different segments of the community can be associated with an orchestra, making it attractive to potential volunteers.

Fulfillment. Individuals look for personal satisfaction and fulfillment instead of salary in their volunteer work. Orchestras offer a wide variety of volunteer opportunities from which the potential volunteer can choose in order to create a fulfilling experience.

Challenge. Orchestra volunteers are not just relegated to "make-work" tasks. They

often take on significant and challenging jobs, especially when financial and other difficulties are accelerating the pace of change in orchestras. Volunteers may be attracted by the challenge and excitement.

4. Valuing the orchestra volunteer. In order to utilize volunteers most effectively, orchestras need to account for the value of the volunteer to the organization and to bring that value to the attention of other volunteers (including the board), the orchestra staff, musicians, and orchestra supporters. Recognizing a volunteer's value makes him or her feel appreciated, gives the entire volunteer corps a sense of respect and importance, helps the staff and board understand the role of all volunteers in making the organization work, and gives the orchestra added credibility when seeking outside support.

Orchestras have tended to value volunteers based solely on money—how much they can give and/or how much they can raise. This fund-raising role is indeed vital: one representative of a major orchestra volunteer association pointed out that her association's annual goal of \$900,000 is the equivalent of as much as \$18 million in endowment funds that the orchestra does not need to have. That volunteer association therefore has a very clear measure of its value to the orchestra. Many other orchestra volunteer associations can come up with similar measures based on funds raised.

The clarity of such fund-raising measures makes it tempting not to use any other means of valuing volunteer resources. Such a limited perspective, however, can undervalue volunteers who do not have an interest in working on fund-raising projects. They may feel like part of a volunteer "underclass," with less status and respect. A purely monetary perspective on value can also create a stressful environment for the fund-raising volunteers: if they miss their goal they often are seen by themselves and others in the orchestra as failures, despite the time and effort they might have put into

projects. In addition, by only thinking of volunteers in terms of money, the orchestra may underutilize volunteers in other areas, neglecting vital services that volunteers can provide.

Orchestras can use other measures of value. Time spent by volunteers is the most straightforward and obvious. Many nonprofit organizations log volunteer hours and assign a monetary value to those hours, enabling them to total monthly and annual volunteer contributions of time to the organization. Such totals are particularly useful to report to foundation and corporate funding sources as a demonstration of community support for the orchestra. They also might help salaried staff and volunteers to track the organization's use of volunteers and to improve planning for the future.

Keeping a record of the time an individual volunteer spends working for the orchestra may also provide a means of ongoing recognition of that volunteer's contribution: volunteers can be awarded service pins or other benefits (e.g., concert tickets, name in the newsletter or program book, gifts such as compact discs of the orchestra's latest recording) at certain milestones (250 hours, 500 hours, 1,000 hours, and so forth). Similar sorts of recognition and benefits can be available to the short-term volunteer or even the one-time group volunteer to recognize the time they have devoted to an orchestra project (e.g., a T-shirt commemorating an orchestra neighborhood clean-up day or participation in the annual radiothon).

Another determination of value would involve identifying work done by the volunteers and estimating how much it would have cost to perform the same work with salaried staff. Adding to that the "opportunity cost" of not having the volunteers—i.e., the opportunities lost for salaried staff to do other things—can result in a powerful measure of the benefits to the orchestra of a volunteer force. It should be remembered, however, that utilizing volunteers is not cost-free. The costs associated with recruiting, training,

and managing volunteers need to be calculated as well.

In addition, a strong volunteer network brings value to the orchestra that is not easily quantifiable, supplying a connection with the community that is essential to the orchestra's survival. That role is unique to the volunteers; it cannot be duplicated by orchestra staff or management. The benefits may be obvious, as when a volunteer makes a key telephone call to secure a contribution to the orchestra; they may be almost invisible, as when a volunteer brings a friend to a concert who then buys a subscription; or they may be down the road, as when the orchestra has building expansion plans and can muster a diverse crowd of supporters at a planning commission hearing.

Clearly, an orchestra that takes the time to consider the value of its volunteers will prize them more than ever. A valued volunteer will be happier and more likely to keep the orchestra on his or her list of preferred volunteer activities.

5. Integrating volunteers into the organization. The organizational model typical of many orchestras separates artistic and management functions. It tends to place musicians at the bottom of the artistic hierarchy and the volunteers at the bottom of the management hierarchy. This position of low status fails to recognize the extraordinary training and ability each group can bring to the orchestra, and makes it difficult for their ideas to be heard at the policy-making levels of board and management. In addition, the tendency for the board, direct-service volunteers, salaried staff, artistic leadership, and musicians to operate in their own spheres impedes effective communication about organizational goals, activities, and issues.

Orchestra organizational structures vary widely, of course, depending on the orchestra's size, budget, history, traditions, management practices, board design, and so on. The extent and ways volunteer assistance is integrated with the

orchestra's structure can also vary. A small-budget orchestra may depend very heavily on volunteers to take on staff functions. A large-budget orchestra may have numerous and varied volunteer structures that appeal to different types of volunteers. The volunteers may assume a variety of roles, some quite independent of the orchestra staff and management structure.

In general, however, the greater the integration of the volunteers' activities with the goals and activities of the orchestra as a whole, the more productive and effective they will be. In orchestras with highly autonomous volunteer associations, the goals of the orchestra and the association may not always coincide. Volunteer leagues often play a significant social role for their members; particular kinds of orchestra traditions, concerts, or relationships may be very important to the volunteers. Attempts to change old ways of doing business and expand the orchestra's role in the community, for example, may cause resentment or friction among long-time volunteers.

Staff relationships with volunteers are not always ideal. Recruiting, training, and maintaining an enthusiastic and effective volunteer corps may not be on the manager's daily agenda. As one Issue Forum participant pointed out, "Most managers are worried about making payroll every day." Staff below the executive level may also have trouble relating with volunteers: divisions of responsibilities may be unclear; staff may resent taking the time to train volunteers; staff may not have any idea how to delegate tasks to volunteers, having never received any training themselves in volunteer management. Staff may even feel threatened by aggressive and competent volunteers.

Some orchestras can afford to hire specialized staff to manage volunteers. A "coordinator of volunteer resources" or "director of volunteers" often works within the development office, reporting to the director of development. This structure tends to emphasize the fund-

raising aspects of orchestra volunteerism, and does not easily accommodate some other types of volunteerism. For example, when orchestra musicians volunteer to do extra programs in schools, they would most likely work with the education director, who might or might not be working with a development office-based director of volunteers to recruit nonmusician volunteers for a school program. And, as discussed earlier, the fundraising emphasis in orchestra volunteerism tends to discourage a more diverse population with varied skills and interests from getting involved.

The Task Force has identified a series of strategies for achieving better integration of the volunteers into the orchestra organization:

(a) *Restructure.* The volunteer corps can be reorganized so that all types of volunteers—governance volunteers, direct-service volunteers, group volunteers, and orchestra salaried staff and musicians who wish to volunteer—are managed within a single overall structure with goals and policies that match those of the orchestra as a whole. For example, an orchestra embarking on a comprehensive educational initiative can adjust goals and activities of all types of volunteers to support the educational mission. Or, an orchestra making an effort to increase racial and cultural diversity among its staff and musicians can incorporate a similar effort around volunteer recruitment.

Restructuring the financial system—so that the cost and value of all types of volunteers are integrated into the overall financial systems of the orchestra, and their expenses and revenues are part of the operating budget of the organization—will also help.

(b) *Involve.* Such restructuring does not by itself solve organizational problems. Rather, it is the increased involvement of volunteers facilitated by restructuring that begins to make a difference. Volunteers can be involved at all levels of the organization, with governance and direct-service volunteers sitting on various

board committees and participating in the analysis and decision-making processes of the orchestra. Board meetings can be opened to a range of volunteer observers who also can be included in working groups of governance volunteers, musicians, staff, and others constituted to address the orchestra's needs and problems. Information is key: all volunteers need access to information to be effective; they also must be willing to share information with others. Involving volunteers in all aspects of orchestra life will build trust and positive relationships throughout the organization.

(c) *Clarify.* Written volunteer job descriptions can be invaluable in clarifying for management, staff, and volunteers the extent and nature of the work commitment expected, and in making it easier to see how a particular volunteer's effort fits into the larger organizational plan. A sensitively designed and positively oriented system of evaluating volunteers and the work they do can also be a valuable tool in structuring relationships among staff and volunteers, and in improving how the orchestra utilizes volunteers.

(d) *Eliminate barriers.* A system that welcomes all individuals willing to work will be a more open and flexible system, better able to adjust with the changing needs of the orchestra. For example, dues and ticket-buying requirements can create distinctions among volunteers who can pay and those who cannot. Opening the doors to varying levels of volunteer involvement can expand and diversify the volunteer pool, and does not have to undermine the roles of existing volunteer organizations.

(e) *Support.* Moving volunteer management out of the development office and creating a separate department of volunteer management of equal status with development, marketing, finance, etc. can provide an optimal system in many orchestras for supporting a restructured volunteer corps.

While establishing an entire new department may be beyond the capacity of

many orchestras, creating a position of "coordinator of volunteer resources" can be an important and useful step for every orchestra. This coordinator can be a salaried staff member if resources permit, or a volunteer who is willing to take on a substantial and responsible job. Whether salaried or not, the coordinator of volunteer resources needs support in order to work effectively: office space, clerical assistance, telephones, supplies, and a budget to cover recruitment and volunteer recognition costs. Ideally, the coordinator is a member of the senior staff and reports directly to the top manager. As a senior staff member, the coordinator of volunteer resources has the kind of access to information and decision-making processes that enables the volunteer activities to succeed.

The coordinator of volunteer resources functions in both internal and external capacities: internally as a resource for other staff members who utilize volunteers, and externally to establish relationships with colleagues in other voluntary organizations and reach out to potential volunteers in all sectors of the community.

The orchestra's top manager can delegate to the coordinator of volunteer resources the responsibility of managing all volunteer activities. The coordinator serves as the primary link between orchestra staff and volunteers, providing the necessary continuity and coordination that is missing from many orchestra volunteer programs.

Some voluntary organizations have had success with a system in which a volunteer leader works in partnership with a staff member toward a specific end. To establish these partnerships within the orchestra, a skilled and experienced coordinator identifies those functions that can be enhanced by dual leadership, carefully selects volunteers whose skills complement those of the staff members, and provides training in developing partnerships.

(f) *Train*. The coordinator can also have the responsibility of organizing training. The effort to integrate volun-

teers into the "fabric" of the orchestra can be an excellent catalyst for improving communication and relationships throughout the organization. The most effective training is orchestra-wide, touching all types of volunteers, as well as top management, the music director, salaried staff, and musicians.

The initial purpose of volunteer-related training can be to create a consensus throughout the organization about the importance of volunteers in advancing the orchestra's mission and objectives. Communication with everyone about the content of those missions and objectives and how the orchestra plans to reach them is also an important part of the overall training effort.

The training for each group may need to be different. For example, orchestra staff can benefit from training that helps them work more effectively in partnerships with volunteers; musicians might benefit from training on how to be effective volunteers in educational programs; direct-service volunteers need information and training for specific jobs they are expected to perform, as well as overall orientation about the orchestra; governance volunteers need a similar orientation as well as specific information on governance issues and responsibilities.

Training for volunteers may also include opportunities to be involved with and learn from the music-making activities of the orchestra, through attendance at rehearsals, special lecture-demonstrations, and other kinds of organized contact with the musicians. All volunteers, as well as salaried staff and musicians, can benefit from information and training to enable them to be good advocates for the orchestra.

Training can also be crucial in laying the groundwork for change within the orchestra, reaching beyond the issue of volunteerism to encompass many of the concerns and needs of the orchestra. Involving and informing participants and soliciting their opinions and ideas helps to build consensus for the kind of trans-

formative change already discussed in this report as vital to the survival of many American orchestras.

DESIGNS FOR CHANGE

Here we examine four orchestras that embody characteristics and situations common to many orchestras to clarify how the issues discussed above may apply in real-world situations. These cases are not intended to single out a particular orchestra, although the details derive from actual orchestras and illustrate real dilemmas faced by orchestras of different sizes, types, and locations. Issue Forum participants from within and outside the orchestra field examined these cases and made recommendations based on their own considerable experience. These recommendations are not prescriptive for every orchestra; they constitute one set of choices these particular orchestras might make to improve their utilization of volunteers and their overall organizational effectiveness.

Orchestra One: Orchestra with a mid-size budget in a major metropolitan area.

The Case: Orchestra One has a \$4.5 million annual budget, 80 full-time musicians, and a 24-member board that includes four nonvoting members. One of the nonvoting members is the volunteer auxiliary council president. This council is made up of the immediate past president, current president, and president-elect of each of six separate auxiliary groups, each with varying policies as to dues and membership. A business-oriented group, for example, requires a minimum contribution of \$2,500 to join; the Symphony Circle is the next level at \$1,000 minimum contribution; the Friends require a \$100 contribution; and the remaining groups have open membership. The six groups together total 1,100 members and raise \$400,000 per year toward the orchestra budget; this amount constitutes 25 percent of annual contributions to the orchestra. The orchestra maintains

a salaried volunteer manager as part of the development office staff.

Despite a good record of volunteer participation, the orchestra has been aware of the following negative aspects of its volunteer programs:

- A general decline in the level of volunteer activity, along with decreases in membership (currently 1,100, down from 1,400) and contributions to the orchestra;
- Difficulty in attracting men, and younger people of both sexes. Current members are almost all older females;
- Emphasis on fund-raising to the exclusion of most other activities, which seems to have a negative effect on participation;
- Lack of integration of volunteers into the orchestra's governance and management structures;
- Lack of access to volunteer resources by many staff members.

Recommendations: This orchestra can cite many positive attributes in its volunteer program. The auxiliary council, in particular, has worked well as an umbrella coordinating group for all of the volunteers: it has provided a good training ground for volunteers; and it has empowered volunteers to become a significant part of the orchestra's fund-raising process. There are ways, however, that volunteer utilization can be improved.

(a) *The Auxiliary Council.* To move beyond a narrow fund-raising role for the volunteers, the existing council could be enhanced by adding a series of volunteer vice presidents: a vice president for community education to develop volunteer participation in orchestra education programs; a vice president for recruitment to work on broadening the volunteer base; a vice president for recognition, who works on formal and informal ways of recognizing volunteers; a vice president for training to coordinate volunteer training; a vice president for advocacy who

mobilizes volunteers to support advocacy efforts on behalf of all arts institutions in the community; and a vice president for planning to coordinate volunteer planning with overall orchestra planning.

(b) *Staff.* Move the volunteer manager out of the development office and create a separate volunteer department answering to the general manager on the same level as development, education, operations, and so on. Initiate training for all paid staff on methods of working effectively with volunteers; provide space and support to various departments to enable them to incorporate volunteers into their operations.

(c) *Involvement and communication.* Make the auxiliary council president a voting member of the board's executive committee. Include direct-service volunteer representative on all board committees, and any ad hoc planning or advisory committees of the board.

(d) *Musicians.* Include musicians in all mailings of volunteer material. Encourage musicians to work with volunteers and to become volunteers themselves.

Orchestra Two: Orchestra with a mid-size budget in an ethnically diverse city.

The Case: This orchestra has been in existence for several decades and has had its financial peaks and valleys. It ceased operations for a time, after which the organization was reconstituted and a new musician contract negotiated. The crisis had a devastating impact on the organization and on its relations with the community.

The majority population of the orchestra's home city is Latino; the board is ethnically diverse, although not in the same proportion as the community. Out of 70 board members, 30 percent are Latino. The board is continuing to work to diversify its membership. One problem with recruiting a large number of new board members is that most have come with limited orchestra experience; only 10 members have been on the board more than five years.

Although ticket sales and fund-raising rebounded well after the crisis, it has been difficult to attract new volunteers to support the orchestra. The volunteer association is 100 percent female and not racially or culturally diverse. About 1,000 members pay modest dues and organize a series of annual fund-raising events, including a ball, a radiothon, a decorator's showhouse, and holiday events. Non-association volunteers are also involved in the radiothon and the annual fund solicitation, and students from the local university volunteer to act as orchestra docents. Association and non-association volunteers work together to organize logistics of the orchestra's education program.

The orchestra's need for direct-service volunteers increased when, during the financial crisis, it became necessary to reduce the number of paid staff drastically. This immediate need complicated already existing problems that pervade the efforts of many orchestra volunteers:

- The volunteer structure is not dynamic, diverse, or well coordinated;
- Traditional volunteer projects have become stale and unproductive;
- The volunteer leadership needs renewal;
- Relations between staff and volunteers are strained at best, with volunteers seen by staff as a problem rather than an opportunity;
- Volunteers are not involved in any part of the orchestra's decision-making processes;
- There is no one to coordinate volunteer activities.

Recommendations: This orchestra needs to develop a comprehensive vision of how volunteers can be utilized and plan to implement that vision over a period of three to five years:

(a) *Broadening the volunteer base.* Include in the plan an effort to reach out to the broader community, involving the orchestra in community concerns and attracting a diverse cross-section of the

community as volunteers.

(b) *The board.* Leadership for a long-term vision of enhancing the volunteer resources of the orchestra needs to come from the board, but the board of this orchestra is too large and unfocused to exercise dynamic leadership. Decrease the size of the governing board to make the conduct of orchestra business more efficient. Former members of the governing body can continue their involvement through a number of different mechanisms. Some organizations, for example, form auxiliary boards that wield authority in broad policy areas; others maintain advisory or honorary boards whose members are involved at varying levels in fund-raising or other activities.

(c) *Volunteer structure.* The existing volunteer association can be seen as just one component of a larger structure that employs volunteer resources throughout the organization. Review the activities of the association to ensure that they are compatible with the orchestra's mission and objectives.

(d) *Staff.* Since this orchestra cannot now afford to hire a coordinator of volunteer resources, it should seek someone to take on those responsibilities on a volunteer basis, and provide the support and training necessary to enable this person to coordinate all volunteer activities, including the association, annual fund volunteers, and education program volunteers. Recruiting a few office volunteers can go a long way toward reducing pressure on the overworked salaried staff. With thorough training, both volunteers and staff members can build mutual respect and cooperation.

Orchestra Three: A professional orchestra with a small budget in a small city.

The Case: This orchestra has a \$1.5 million annual budget that will be cut by at least \$100,000 in the coming year due to losses in state arts funding. The orchestra has fewer than 10 salaried staff, with no coordinator of volunteer resources. Most

staff perform more than one function: one person handles development and marketing; another manages both operations and education. Membership on the board is considered quite a prestigious position in the city; there are 50 members, equally divided between men and women, with an executive committee of 12. All board members are limited to two three-year terms.

Three separate volunteer groups are associated with the orchestra. The main volunteer association is a traditional women's group with 300 dues-paying members and an annual expense budget of \$280,000. They contribute \$75,000 to the orchestra and \$50,000 to the city's youth orchestra, which the volunteer association started. The association's financial accounting is part of the orchestra's overall financial reporting and auditing procedures, although their fund-raising events are reported separately. Although this group has been losing membership, they have been successful in reversing a declining ticket-sale trend for the orchestra.

Two smaller "friends" groups are focused on special communities: The first is comprised of African American women who work to promote orchestra activities within the African American community, focusing on music education for young people; the second is an out-of-town group that raises money for orchestra programs in its town.

There are also volunteers who work in the orchestra office and have no relationship with any of the volunteer groups. These direct-service volunteers are particularly valuable in this small orchestra, but there is some mistrust and friction between staff and office volunteers because some functions previously performed by volunteers are now performed by salaried staff.

The executive director of the orchestra spends most of his time working with volunteers: about 50 percent of his time is devoted to managing the three volunteer groups and another 35 percent is related to board activities.

The key issues for this orchestra are:

- The relatively small monetary contribution from the main volunteer association to the orchestra, especially at a time when state funds are decreasing;
- The fragmentation of the volunteer effort;
- Uncoordinated and potentially competing fund-raising activities conducted by the orchestra and staff and by the various volunteer groups; and
- The extraordinary amount of time spent by the executive director on volunteer coordination.

Recommendations:

(a) *Planning and reorganization.* When addressing the orchestra's financial concerns, consider its relationship to the volunteer associations. In particular, the merger of the main volunteer association with the orchestra to form one 501(c)(3) organization would complete the consolidation that began when they merged financial accounting. Give a board-level committee the responsibility of coordinating volunteer activities, including: developing the annual volunteer schedule, coordinating fund-raising events and prospects, coordinating training, and developing the orchestra's annual volunteer recognition event. Include representation from community members not already on the board.

(b) *Leadership.* Redefine leadership positions in order to make the jobs as attractive as possible.

(c) *Staff.* Remove the volunteer coordination load from the executive director by using association funds to support a coordinator of volunteer resources. Look to fill this initially unsalaried post from the ranks of past leaders, in order to build into the position immediate rapport with the volunteers.

(d) *Recruitment.* One focus of the new coordinator can be to recruit new types of volunteers: married couples, men, young

professionals. One recruitment technique is to establish special constituency groups that cater to the interests of these populations. A family-oriented group, for example, can take on weekend projects; a young professionals group might concentrate on evening activities.

(e) *Training.* Because of the history of staff/volunteer friction in this orchestra, training for both staff and volunteers would be particularly useful. Include focus sessions for staff on how to work with volunteers, with information on planning volunteer tasks, conducting volunteer orientations and training, and structuring volunteer relationships.

INSTRUCTIONS TO OURSELVES

The Task Force has presented the above designs for change in the hope that many orchestra leaders—both staff and volunteer—will see some of their own challenges and potential solutions in the four orchestras. As orchestra leaders examine their own volunteer program, the Task Force urges them to keep in mind the following "Instructions to Ourselves."

1. We need to consider the question "why the orchestra?" An answer to the question should be reflected in our mission statements. Know what makes us unique. When thinking of whom we can reach, whom we can involve and engage, think of the entire community. Then we can ask, and successfully answer, "why the volunteers?"
2. "Why the volunteers?" Above all, because they can represent and involve a broad public, and extend an orchestra's contacts deep within its community. They help give the orchestra a recognizable face and a credible voice. They perform work without which the orchestra cannot survive.
3. The orchestra and its volunteers are part of one institution with one mis-

sion. Think of it as a whole, whose strength depends on the integration of its component parts—on the quality of attitudes and the cohesiveness of relationships among volunteers (governance, direct-service, and group), audiences, musicians, salaried staff, and funders.

4. "Access" for volunteers means that the doorways into our orchestras need to be wide and numerous, so that:

- Various types of volunteers can come forward;
- They can come forward for different reasons, with different levels of commitment;
- They can stay for varying lengths of time;
- Different social, economic, racial, cultural, religious, and age groups can be represented in the volunteer corps;
- The benefits of volunteering can be tailored to the different needs and desires of all volunteers;
- Various roles and responsibilities are available to all volunteers once they come into the organization.

5. Orchestras need to value fully and fairly the contributions that all types of volunteers make—and to index that value to more than money contributed or social contacts. Acknowledging the impact of all volunteers (both what they give and what they cost) is essential to their complete and meaningful integration into the life of the institution. "The concept of volunteerism needs to permeate our orchestras," stated one Issue Forum participant.

6. Reinventing the orchestra so that it can respond to the changing nature of volunteerism requires more inclusive decision-making processes, more authority vested in the volunteer corps, and the reorientation, ed-

ucation, and training of all orchestra participants—including current and incoming volunteers. The first barriers to be overcome are internal.

7. Look for the intersection of various social and cultural needs to discover new ways of relating to the community at large and new sources of volunteers.

8. Expectations on all sides need to be reasonable and clearly communicated.

- Given the investment of resources and authority, what can the salaried management staff and musicians expect of volunteers?
- What do volunteers expect in return?

9. Coordination of volunteer resources should rank high as a management priority; it can be delegated to someone salaried or unsalaried, who has authority and support at the highest levels of the organization.

LOOKING AHEAD

The strength of American volunteerism and American voluntary organizations is the envy of many around the world. The history of substantial volunteer commitment to orchestras in this country is one of the greatest assets the orchestra field brings to the challenge of creating the new American orchestra. A welcoming, flexible, and creative approach to recruiting, training, and utilizing volunteers can stretch orchestras' resources, energize their relationships with their communities, and help make the larger goal of Americanizing the American orchestra attainable.

THE CHANGING NATURE OF VOLUNTEERISM: SOME QUESTIONS TO CONSIDER

1. Do all orchestra participants understand the critical role that is played

by volunteers of all types? Do they understand the scope of volunteer activities to include governance, direct service, and group volunteers?

2. What steps has your orchestra taken to make a convincing case to the community that it deserves support? Has it made the case to a broad pool of potential volunteers in the community?
3. What strategies are in place to attract a corps of volunteers that reflects the diversity of the community?
4. Has your orchestra developed strategies for making volunteers feel valued by the institution? Does that sense of value go beyond the amount of money volunteers donate or raise?
5. Are there a variety of ways in which someone can participate as a volunteer? Is the organization flexible in accommodating people with different needs, schedules, and financial capabilities?
6. Has your orchestra developed volunteer job descriptions, including explicit listings of expectations and benefits for volunteer recruitment?
7. What strategies have been put in place to integrate volunteers effectively into your orchestra's organizational structure? How well have cooperative partnerships been established between volunteers and salaried staff?
8. What training opportunities exist for all types of volunteers? What training exists for salaried staff who work with the volunteers?
9. Is volunteer coordination regarded as a high management priority?

NOTES

1. The American Symphony Orchestra League's 1992 *Gold Book* reveals that, among the 151 volunteer associations

reporting, females constitute an average of 93.7 percent of the membership.

2. 1991 *Statistical Abstract of the United States*, U.S. Department of Commerce.
3. *Giving and Volunteering in the United States*, 1990 and 1992, surveys conducted by The Gallup Organization for Independent Sector, Washington, DC. Sixty-four percent of persons age 35–44 volunteered in 1989, up from 54 percent in 1987. Average hours volunteered per week among all American households increased from 4.0 in 1989 to 4.2 in 1991.
4. For the 1991–92 season, 151 volunteer associations reported raising a total of \$21,894,222 for their orchestras through fund-raising events.
5. The New York Philharmonic is an example of an orchestra that has eliminated dues for its volunteer organization members. The Philharmonic took on the costs of supporting the volunteer activities and asked the members each to contribute to the annual fund, with a suggested minimum of \$25.
6. "RSVP" operates in communities throughout the country offering adults age 60 and over opportunities to serve as volunteers through a variety of organizations, agencies, and institutions.
7. The number of African Americans who volunteer rose from 28 percent in 1987 to 38 percent in 1989 to 43 percent in 1991. Between 1987 and 1989 the figure for Latinos went from 27 percent to 36 percent. *Giving and Volunteering in the United States*, 1990 and 1992, surveys conducted by The Gallup Organization for Independent Sector, Washington, DC.
8. See Nancy Macduff, "Stalking the Elusive Volunteer," *SYMPHONY*, November/December 1992, p. 29. Macduff suggests the use of written volunteer job descriptions that include an explicit listing of expectations and benefits for volunteer recruitment.