

Stockton Symphony

Equity, Diversity, and Inclusion (EDI) becomes
Inclusion, Diversity, Equity, and Accessibility (IDEA)

Kathy Hart & Philip West

The Beginning: 2020—COVID & Racial Unrest

- What moved members of the Stockton Symphony to Undertake an Equity, Diversity, and Inclusion Effort?

Awareness of Racial Inequities, Violence and Unrest

Exhortations from Professional Organizations to Take a Stand and Improve

Personal Awareness that We Need to Improve How We Do Business if the Symphony Expects to Survive

COVID

What did we do?

- Formed a seven member ad hoc committee called the EDI (Equity, Diversity, and Inclusion) Planning Group.
 - Initial members included our CEO Philip West, 2 musicians, 3 ethnically diverse Board members, and Board President KH.
 - Sought Professional Organizations' Advice (ACSO, LAO, SF Symphony)—discovered that many Symphony Orchestras had already been doing this work.
 - Understand the Definitions: Equity, Diversity, Inclusion. Board implications of the concepts.
 - Emphasized the Value of Each for the Symphony, e.g., Diversity (ethnicity, age, geographic location, position in the organization, occupation, etc.).
 - Developed goals and objectives to pursue.

Initial Considerations

- Professional Organizations and Symphonies that were already doing this work strongly advised the use of a professional EDI consultant.
- We decided not to invite the Music Director or to expand the group until we had become well-established and we had engaged the consultant.
- We decided to work on diversifying the Board of Directors first especially in terms of ethnicity, age, and geographical location.
- We decided we needed to do some research on our current situation to acquire external perceptions of the community we serve and to understand the demographics.
- We decided to ask the Board for the funds to pursue hiring a consultant. They agreed almost unanimously.

Do the Research and Educate Ourselves, Our Board, Our Staff, Our Audience, and Our Community

Research Questions:

What are the demographics of our county and the cities within our county?

What are the demographics of our county and the cities within our county's schools?

What are the demographics of our current audience?

What do we want the demographics of our future audience to be?

What are the EDI barriers to concert attendance, participation, and employment?

What Did We Learn from the Research?

- The US Census Quickfacts (2020)
 - [U.S. Census Bureau QuickFacts: United States](#) (Stockton)
 - [U.S. Census Bureau QuickFacts: United States](#) (San Joaquin County)
 - Or just Google Population Demographics of San Joaquin County
- This information gives you all kinds of information about the population, e.g. age & sex, race & Hispanic origin, population characteristics (veterans, foreign born), families and living arrangements, computer and internet use, education, health, economy, transportation, income and poverty; Businesses.
- From there you can drill down.

What Did We Learn from the Research?

- We also used EdData to explore the schools/education more deeply.
- [EdData - Home Page \(ed-data.org\)](http://ed-data.org)
- EdData is easy to use: you can find data for a county, a district, even a particular school.
- EdData gives you lots of information, graphs & charts, and trends on a number of topics, e.g., cumulative enrollment by race/ethnicity, English learners, proxies for socio-economic status (free & reduced lunch).

Next Steps:

- Find potential EDI consultants, interview, and select. We chose Randi Bryant who worked with us for about a year. We met every two weeks from June 2020 through August 2021. Now we meet once/month
- Begin recruiting for the Board; joined NAACP, met with AA, Hispanic, and Asian Chambers. Advice:
 - YOU HAVE TO GO TO THEM.
 - YOU HAVE TO ASSURE THEM THAT YOU ARE GENUINELY INTERESTED IN THEM AND WHY.
 - YOU HAVE TO WELCOME THEM TO THE ORGANIZATION AND SHOW THEM THAT THEY WILL BE HEARD.
- Invited the Music Director, another musician, and newly recruited Board members to join the EDI Planning Group.

Next steps:

- At Philip's suggestions, change the name of the Planning Group to IDEA by including Accessibility in the name.
- Analysis of surveys of our audience: who they are and what they want.
- Discussion of how we want our audience to change and grow and how to reconcile what the current audience wants and how to appeal to a more diverse audience: age, ethnicity, geography, etc.
- Town Hall meetings with musicians conducted by Randi.
- Town Hall meetings with audience and patrons conducted by Randi.
- Discussion of policies and procedures; by-laws; and other documents and suggest revisions that may be off-putting to our desired new Board members, orchestra members, audience, etc.

Outcomes:

- A much better understanding of our community and our potential audiences that provided us with direction.
- A set of mutually-agreed upon goals, objectives, time lines, and sponsors (committees or individuals) that we could present to the entire board as a strategic plan.
- Board approved the plan in August 2021.
- We have asked those responsible for accomplishing goals/objectives to report to the IDEA committee quarterly.
- IDEA is now a Standing Committee of the Board of Directors of the Stockton Symphony. (We recognize this effort will require continuous commitment)

Lessons Learned

- Our consultant helped us immeasurably in making progress on our goals and plans.
- Not everyone is going to be on board.
- Someone in the organization must drive the effort; there should be a succession plan.
- Meeting regularly (2 x/month) really helped. The group bonded well, and now takes their oversight of the strategic plan very seriously.
- The pandemic and the overall climate of the country helped galvanize the group.