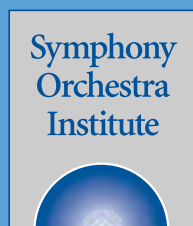


Musician Evaluations of Symphony Orchestra Conductors



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In 1967-1968, the leadership of the International Conference of Symphony and Opera Musicians (ICSOM) initiated a conductor evaluation system for use by musicians in its member orchestras. This system was created as a way for the musicians to express an objective, group evaluative opinion of the performance of the conductors leading them. It was expected that the system could provide thoughtful, confidential feedback to orchestra managements about the performance, presence, and skill of those conductors, as perceived by orchestra members, particularly in relation to future-season engagements.

A central component of the system was a standardized reporting form, completed voluntarily and anonymously by musicians shortly after a series of performances with a conductor. These forms were collected and the data tabulated by the orchestra's ICSOM delegate. The overall results were available to each orchestra's management, if and when requested, and to the delegates of other ICSOM orchestras, if they inquired.

The form was redesigned in 1970, based on initial use and experience. In late 1982, the form was again redesigned and updated by a representative, interested group of ICSOM musicians. The second redesign incorporated this group's and their colleagues' many years of experience with the form and the various evaluative criteria it incorporated, and was undertaken in preparation for establishing a master database at Wayne State University in Detroit. This new approach led to much more efficient and comprehensive assembly of the data, improving the ability to broadly and relatively easily share findings among the many authorized musicians (ICSOM delegates) at widely dispersed locations, and, through them, with their orchestra managers, if requested.

The mission of the Symphony Orchestra Institute is to foster positive change in how symphony orchestra organizations function in order to improve their effectiveness, to enhance their value in their communities, and to help ensure their preservation as unique and valuable cultural institutions.

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The ICSOM evaluation criteria, which musicians are asked to rate on a five-step scale from “strongly agree” to “strongly disagree” for each conductor are:

- ◆ has a thorough knowledge of the scores conducted;
- ◆ is able to communicate the emotional content of the music;
- ◆ demonstrates excellent baton technique;
- ◆ chooses excellent tempi;
- ◆ corrects faulty intonation;
- ◆ corrects faulty balance among instrumental groups;
- ◆ is a sensitive accompanist;
- ◆ makes efficient use of rehearsal time;
- ◆ makes remarks that are understandable and effective;
- ◆ leads rehearsals in a tactful, respectful way;
- ◆ achieves excellent performances; and
- ◆ based on the above criteria, should be considered for reengagement.

In 1996, the Institute became familiar with the ICSOM conductor evaluation system and the database of evaluative information that had accumulated since the early 1980s. The database appeared to contain more than 50,000 evaluations of more than 200 conductors from the more than 40 orchestras. Upon inquiry, the Institute received permission from ICSOM to analyze this data on the condition that any data provided would be made available only in aggregated form, and would not allow identification of evaluations by individual orchestras or orchestra members, or of individual conductors. As it got underway, the project became known as the Conductor Evaluation Data Analysis Project or CEDAP.

The Institute retained the services of Dr. Patrick Kulesa to work with the staff of Wayne State to organize the data to be included in CEDAP. Data were organized by the seasonal year of orchestras—September 1 to August 31—and data for the 10 seasonal years ending August 31, 1997 were included in the analyses. After review, it was decided to exclude the data from orchestras solely or primarily part of opera organizations, and that from orchestras that had not been in continuous operation over the selected 10-year period. Also, a total minimum number of evaluations for any one conductor was established. These filters resulted in a data universe of some 40,000 evaluations of 67 conductors submitted by members of 35 orchestras over a 10-year period.

In 1998, Dr. Kulesa completed his basic overview of this data and summarized his findings in *Harmony #7* (October, 1998). A recap of those initial findings is as follows.

The overall ratings for conductors were quite high and this general approval varied little by instrument group in the orchestra (woodwind, string, etc.). Different criteria for evaluating the conducting role—for example, knowledge of score, baton technique, and rehearsal-time usage—were highly intercorrelated. That is, a high rating on one of these dimensions was associated with high ratings on the other factors as well. This was true across all musicians and by instrument group. There was also little variability on these ratings over the 10-year period of data; ratings across time were uniformly positive.

Phase Two

In addition to being published in *Harmony*, the phase one results were reviewed with an advisory group of musicians. During this review, a number of potential variables were identified which, if quantitative data relating to them could be collected, might provide more insight into and differentiation of the conductor evaluations in the data universe.

A data collection effort was then initiated. For each conductor in the phase one analysis, the Institute undertook to obtain the following information: age group, gender, nation of birth, current national citizenship(s), primary language, place of early upbringing, place of postsecondary musical training, primary instrument of musical training/performance, years of professional orchestral conducting, country in which principal conducting experience took place, extent of opera conducting experience, orchestra music directorships and/or conducting staff experience (years and institutions).

Unfortunately, after an extensive effort, only data as to age group, gender, nation of birth, and primary instrument of training/performance were collectible for 53 of the 67 conductors in the phase one study. Even then, the primary instrument of training/performance was sometimes debatable and data as to orchestra affiliations were somewhat incomplete. Data as to age group, gender, and nation of birth were deemed to be accurate, but it was determined that only 4 of the 53 conductors were female and that this variable would not permit useful statistical comparison.

Since the phase one analysis had shown high consistency across the 10-year span, it was decided that data from the most recent seasonal year in the 10-year study would be representative of the larger sample, as well as reflect any recent influences on conductor evaluations. Thus, data for the following orchestral characteristics of 27 orchestras were collected for the seasonal year ending in 1997: the orchestra's metropolitan area population, annual operating expense level, number of contracted player positions, percentage of female players, and minimum contracted annual player compensation. For 16 of the 27 orchestras, with the assistance of various orchestra personnel managers, data were collected as to the average age of players and their average years of service.

These underlying and supplemental data for the season year 1997 were analyzed, resulting in a final sample of approximately 6,800 musicians' evaluations. Conductor-related analyses were completed on a subsample of 2,255 evaluations. Evaluations in the orchestral sample were grouped for comparison into two or three roughly even groups (such as smaller or larger metropolitan community; lower, medium, or higher compensation, etc.). This was done using the distribution of the variables themselves, and not through comparison with an external standard. Evaluations in the conductor sample were categorized by birthplace (U.S. or non-U.S.), by instrument of training/performance (string, piano, other), and by music director or non-music director.

Analysis and Results

A series of analyses (analysis of variance and t-test procedures) revealed significant differences for several conductor and orchestra variables in our sample. As the sample sizes are very large for these comparisons, there is a tendency for small differences between groups to be significant. Therefore, a smaller than usual probability level of $P < .001$ was selected for all comparisons.

Variables showing significances were as follows:

- ◆ birthplace of conductor (U.S., non-U.S.);
- ◆ conductor's primary instrument of training/performance (string, piano, other);
- ◆ orchestra metropolitan-area population (smaller, larger)
- ◆ orchestra annual operating-expense level (lower medium, higher);
- ◆ size of orchestra (smaller, medium, larger);
- ◆ percentage of women (lower, medium, higher) ; and
- ◆ average years of service (shorter, longer).

In the first phase of CEDAP, as noted earlier, conductors were evaluated quite positively. This finding held in the subsequent examinations of data. However, for the variables for which we were able to collect data, there were interesting distinctions in the ways players in orchestras rated different aspects of the conductors' techniques.

Where possible (when there were enough ratings to make a comparison), ratings by orchestra players of conductors who were their music directors were compared with those of conductors who were not their music directors. Very similar results were shown for the two groups, suggesting that, with respect to our sample, players do not evaluate their own music directors preferentially.

In the sample we developed, non-U.S.-born conductors were rated more highly than U.S.-born conductors on many of the evaluative criteria contained in the ICSOM form. These criteria included knowledge of score, emotional content (on which there were the strongest differences in ratings), baton technique, tempi, correct intonation, correct balance, sensitive accompanist, efficient time use, achieving excellent performances, and reengagement. U.S.-born conductors were rated more highly than non-U.S.-born conductors as to clear and effective remarks and tact.

The conductors' primary instrument of training/performance, as determined in our data collection effort, also showed differential ratings for certain evaluative criteria. The strongest variation was in the area of correct intonation: conductors whose primary instrument of training/performance was identified as a string instrument were more highly rated on the criterion of intonation. It is interesting to note that all instrument-group players in our sample rated "string background" conductors more favorably as to intonation, dismissing the possibility that this finding was due to string players—as the largest block of players in an orchestra—preferentially rating conductors with similar instrumental backgrounds.

Players in “smaller” orchestras within our data universe—those—ranked as representing smaller metropolitan areas, having relatively lower operating expense levels, and with smaller orchestra size—tended to rate conductors more highly than did players from the “larger” orchestras in the sample. Additionally, orchestras with relatively larger percentages of female players rated conductors more highly than did orchestras with relatively smaller percentages of female players. Also tending to rate conductors more highly were those orchestras whose players’ length of service was relatively shorter.

Discussion and Critique

The results of this second stage analysis did confirm that ICSOM orchestral musicians, overall, evaluate their conductors quite positively. Further, for our sample, and on the basis of the available data, there are statistically significant differences within those positive ratings, as summarized above, which appear to depend on characteristics of conductors and of the orchestras.

However, upon ultimate review, we believe that sound insights or useful generalizations to be drawn from the above statistical results are limited. After our musician advisory review of phase one results, we had hoped to develop broadly based insights on how non-U.S.-born versus U.S.-born conductors were evaluated by orchestra players—a long-standing topic of interest in the symphony orchestra world. To do this, as noted earlier, we set out to obtain data on a range of variables such as birthplace, place of early musical upbringing, institutions of early and graduate musical training, early conducting assignments, opera-conducting experience, primary language, etc. Unfortunately, we were unable to collect accurate, reliable, and verifiable data on any of these variables except place of birth. Also, our analysis would have been much strengthened by opinion polling of a random sample of orchestra players, and perhaps even of managers, critics, and audiences as to how each conductor in our study was perceived. Such a task was clearly beyond the scope of our inquiry. In sum, we have decided that place of birth is an insufficient proxy for all the other variables which would be needed to develop reliable insights into this interesting and controversial topic.

As to the variable relating to instrument of primary training/performance, we did determine a discrete choice for each conductor. However, these data were, in too many cases, deemed unreliable. For some conductors, the primary instrument of performance in the conductor’s working career apparently superseded another instrument of primary early and intensive training. In some cases, the instrument of primary training was not carried forward into a professional career, or only for a short time, whereas in other cases, the conductor has continued to practice and perform the instrument. Also, many conductors perform to some degree on the piano as an integral part of their conducting work. So, in many cases, the conductor’s “primary” instrument of training/performance was not clear and unambiguous. Thus, although the data we used generated interesting implications, they have limited reliability.

Finally, with respect to the apparent differences in degree of positive evaluations of conductors by “smaller” versus “larger” orchestras, we are troubled by the fact, upon review, that the 25 orchestras in the second-stage analysis did not include a number of the larger ICSOM orchestras. This may be because those orchestras have not participated in the ICSOM evaluation system, did not have a sufficient number of evaluations to be included in these analyses, or that we were unable to collect reliable data for them. In a sense, therefore, the orchestras in the sample are in fact closer in size to each other than would be assumed and the sample may be insufficiently representative. It is also true that, overall, the smaller the ICSOM orchestra, the greater the percentage of female players. This may just be the same results reported twice. Finally, we did not take into account in our analysis whether each conductor had led a representative group of the sample’s orchestras, or whether there was one set of conductors who tended primarily to conduct the “larger” orchestras, and another set who tended primarily to conduct the “smaller” orchestras, in which case the evaluation comparison is more complex than indicated.

In retrospect, we are disappointed that we were unable to develop, in the second phase of CEDAP, the broad and reliable base of supplemental data about conductors and orchestras which might have permitted more comprehensive, detailed, useful, and interesting insights into ICSOM symphony orchestra players’ evaluations of their conductors. This may be a task which others will pursue; we wish them good luck!

We invite your comments and reactions to this report.

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