

# *International Conference of Symphony & Opera Musicians (ICSOM)*

Affiliated with the American Federation of Musicians - AFL-CIO

## OFFICIAL MINUTES

August 22-26, 1983  
Baltimore, Maryland

MONDAY AFTERNOON, AUGUST 22, 1983

The Conference was called to order by Chairman Frederick Zenone.

### George Zazofsky Tribute

Chairman Zenone welcomed delegates. He then called our attention to a sad and significant event: the death on August 19th of George Zazofsky, who was the first Chairman of ICSOM. Zazofsky was to have been in attendance at this Conference, and had looked forward to being with us.

Henry Shaw spoke in tribute to Zazofsky, followed by a further tribute from Philip Sipser. After each of the tributes, delegates observed a period of silence in memory of George Zazofsky. Following are the contents of these tributes:

Henry Shaw: We'll reserve a few moments after my remarks to stand in silence. The last thing I thought I might be doing this afternoon would be standing here eulogizing George Zazofsky. Rather, I was anticipating once again renewing acquaintance with a most remarkable person and good friend. George Zazofsky, as many of you know, was a violinist with the Boston Symphony Orchestra, a moving force in the embryonic stages of this organization, and its first Chairman. He served in that capacity for eight years. The words ICSOM and George Zazofsky were synonymous during those eight years. What I say to you next, you would expect to hear of a leader.

George was dedicated. He was forceful. He was respected. He was politically astute. He was combatant when he felt it was necessary to be so. He was recognized as a man among many militants in those early days to be the right person to lead the way---- and lead he did. He was a dynamic personality who

recognized the problems, how to set priorities, and how to deal with the big issues of that time. He was a tireless worker, he was Chairman of the Boston Symphony Orchestra Committee for many years and led a full life as an active professional musician of the highest caliber along with his many other duties.

I will refer now to an issue of Senza Sordino of April 1972, in which there appears a vignette of George several years after he retired as Chairman of this organization. And I think I will read verbatim for just a few moments, but it will give you some indication of what he meant to this organization.

When ICSOM was founded, George Zazofsky, violinist, Curtis graduate, was in his twentieth year in the first violin section of the Boston Symphony Orchestra. He was an annual soloist with the Boston Pops, Concertmaster and Director of the Zimble Symphonietta, which did extensive touring and recording. He was a faculty member of Brandeis University, the New England Conservatory, the Berkshire Music Center, and a member of both the New England Conservatory and the Boston Symphony string quartets.

He vied for the Concertmaster's Chair of the Boston Symphony and although he did not win, his playing of the Berg Concerto in the audition earned him performance of that work with the orchestra in Boston and on tour under the baton of Erich Leinsdorf.

George was Chairman of the Boston Symphony Orchestra Players' Committee from 1960 until he resigned from the orchestra in 1969 to become Professor of Violin and Chamber Music at the University of Miami. In addition to the normal duties of an orchestra committee Chairman, he found time to secure State Department sponsorship for the Symphony Exchange Program which enables one or two members of the Boston Symphony, accompanied by their families, to spend nine months playing with the Japan Philharmonic while their Japanese counterparts play with Boston.

During George's tenure as Chairman of ICSOM, the Statement of Purpose, Constitution, and By-Laws of ICSOM were drawn up. ICSOM sought and finally received some participation in A.F. of M. negotiations with the recording industry. Ratification of symphony contracts became the standard practice in most locals. ICSOM retained its own attorney. A tentative beginning on conductor evaluations was made and ground was broken for a Symphony Strike Fund.

ICSOM's Statement of Purpose, its Constitution and By-Laws were established without abnormal strain for such a young

organization. Nationally the officers fussed and fretted over each paragraph and clause, but that was normal.

Participation of ICSOM in A.F. of M. recording negotiations was quite another matter. A Chairman can advise and counsel and is entitled to his own opinion, but in the end he must follow the dictates of those who elect him. Zazofsky recalls it this way: "It was a very exciting and stimulating ICSOM Conference and participation of Symphony representatives in the A.F. of M. recording case was heatedly debated. The Chairman was given a mandate to send a telegram to the late President Kenin demanding participation by Symphony musicians during negotiations. Although the language of the telegram and indeed the wisdom of the action itself resulted in the most painful period for me, personally, in my twenty-six years in Boston with some of my own colleagues, there is still real satisfaction in the knowledge that Special Payments checks continue to increase to those eligible."

I could go on. Above all else, George was concerned. Always concerned. Ten years after he left ICSOM and the Boston Symphony Orchestra to become a faculty member at the University of Miami, he was still concerned. It was for that reason that in the Spring when I was asked to call him and invite him to the Conference this year, he responded with a quick and certain yes. He had said to me on several occasions after he left ICSOM that he was concerned that young musicians in the profession would fail to understand what happened in the '60's. How hard those years were. The resistance we felt on all sides. The bad press. He wondered how many realized the extent of the accomplishments over the years. He cannot be here to tell us so, but I'm sure he would be asking us not to forget.

When I last saw George, he talked of the early years again. George, how fortunate we were to have you then.

Silence.

I. Philip Sipser: I met George Zazofsky in 1968 for the first time in New York City. I was taken with him because of his concern for all of the other things which Hank Shaw just told you about. You could see it screaming from his very pores. He had tremendous love and commitment to the musicians in his field.

And then I got to know George better. George was a remarkable man about many things, but there was one thing about him that stood out. He had absolute courage and that courage was contagious and that contagion affected all of the people who

worked for him. I caught it myself. It seemed to me that here was somebody who was struggling against enormous odds. At that time it was the Federation, management, and some people inside of ICSOM itself. And despite that, he displayed remarkable courage, the kind of courage that stems from integrity of the man's soul. And he displayed courage often, again, and again.

He had another remarkable quality and that is that he had balance. There were very serious debates --- certainly in '68 and '69 and '70 when I first came on board --- about the action that should be taken with respect to a number of matters. George always showed the necessary balance between the extremes. And that took courage by itself. He didn't figure out what the politics were in connection with the people who were present at the meeting. He thought the problem through and came out with a balanced judgment. That very balanced judgment would convince most of the people whom he met and to whom he spoke, and in those precarious days saved ICSOM as a viable and vibrant representative of musicians.

And then more than both the qualities of courage and balance, he had humanity in his very soul. One of the great opportunities a human being has, is to brush up against the humanity of another person. And in that regard, George had enough humanity so that when you brushed up against his presence, you felt, indeed, that you had met a superior person.

I believe the existence of ICSOM twenty years later is the best indication of the kind of work that he did. You know, many people lead an organization and after they leave, the organization disintegrates. The greatest thing that can be said about George is that his leadership was so strong and so powerful and so deep, that when he left the organization, the organization continued and grew stronger, and I would say to George, if he were here: George, take a look. Take a look at the people who were not with us fifteen or twenty years ago, but who continue in the great ICSOM tradition.

I hope and know that ICSOM will continue in his image for many years to come. We owe at least that to George. That, indeed, will be the greatest testament to George, and one that he devoutly wished.

My admiration for George was great, and is enduring. I know that his wife and sons, his dearest possessions, are justly proud of his great accomplishments.

We were indeed blessed by his presence among us.

Silence.

Roll Call

Secretary Nancy Griffin called the roll of the 46 member orchestras. Delegates present represented the following orchestras:

Alabama	Reed Wallace
Atlanta	Michael Moore
Baltimore	Charles Underwood
Boston	Jay Wadenpfuhl
Buffalo	Jeff Jones (attending in place of Frank Primerano)
Chicago Lyric Opera	June DeForest
Chicago Symphony	Ray Niwa
Cincinnati	Henry Shaw
Cleveland	James Darling
Dallas	Doug Howard
Denver	Melanie Burrell
Detroit	Catherine Compton
Honolulu	Mark Schubert
Houston	Bernice Beckerman
Indianapolis	Sharon Bauerlein
Kennedy Center	Carolyn Parks
Los Angeles	Donald Muggeridge
Louisville	Patricia Brannon
Metropolitan Opera	Sandor Balint
Milwaukee	Elizabeth Tuma
Minnesota	Chester Milosovich
National Symphony	Larry Bocaner
New Orleans	John Hall
New York City Ballet	Laurance Fader
New York City Opera	Richard Beeson
New York Philharmonic	Donald Whyte
North Carolina	Terry Mizesko
Oakland	David Burkhart
Oklahoma	Kyle Champion
Oregon	Judith Litt
Philadelphia	Kathryn Picht
Phoenix	Lenore Lehr
Pittsburgh	Penny Anderson
Rochester	David Angus
St. Louis	Gary Smith
San Antonio	Julie Luker
San Diego	Lynn Johnson
San Francisco Ballet	Mitchell Ross
San Francisco Symphony	Marguerite Figeroid
Seattle	Bruce Grainger
Syracuse	Steve Lawlis
Toledo	John Hancock
Utah	Lisa Allyn

ICSOM Orchestras not represented at the Conference were:

Florida  
Grant Park  
New Jersey

In addition, a delegate was present to represent an orchestra applying for ICSOM membership (and subsequently accepted):

San Francisco Opera                      William Klingelhofer

### Introductions

Chairman Zenone introduced guests, including Victor Fuentealba, President, AFM; J. Alan Wood, Vice-president from Canada, AFM; Jack Hook, Secretary Baltimore Local 40-543; Dick Renna, President St. Louis Local 2-197; and Abe Torchinsky, retired member of the Philadelphia Orchestra.

### Victor Fuentealba, President, AFM: Opening Remarks

President Fuentealba greeted the Conference, and noted that 1969, when he was assigned to represent the Federation at the ICSOM Conference in Baltimore, was a turning point in the relationship between the AFM and ICSOM. Following that Conference, he had returned to President Kenin with a different report than had existed in previous years. Whereas before, there had been fear on the Federation level that ICSOM was an adversary organization trying to break away from the Federation, Fuentealba saw that both the AFM and ICSOM were concerned with improvement of working conditions for musicians. He stressed that there should be cooperation in making these improvements.

Many such improvements have occurred since Fuentealba has been AFM President. Relations between the AFM and ICSOM have improved. Negotiations at the international level concerning symphony and opera musicians now include ICSOM representatives, who are invited to attend at AFM expense. The AFM Symphony Department is now headed by Lew Waldeck, who was appointed by President Fuentealba following ICSOM Chairman Frederick Zenone's recommendation. As of July 1, 1983, Waldeck is a full-time Assistant to the President.

The AFM Convention in June 1983 was an historic meeting, which finally turned the tide of thinking of many delegates. The Convention adopted a by-law change requiring ratification of contracts, and approved a policy recommendation to support delegates to the annual ICSOM Conference. President Fuentealba felt that AFM Convention delegates now have a changed attitude toward ICSOM, and indicated that we will see more cooperation from locals in the future.

The Congress of Strings has celebrated its 20th anniversary; the IEB met in Cincinnati in recognition of this event. ICSOM has contributed a \$500 scholarship for next year's Congress of Strings. Lew Waldeck will be a member of the Congress of Strings Committee. President Fuentealba noted that the Congress of Strings is one of the most successful programs that the Federation has sponsored.

He closed by welcoming delegates to Baltimore.

### Minutes of the 1982 Conference

A motion passed to approve the minutes of the 1982 Conference (Motion #1, Fader/Whyte).

### Chairman's Report

Chairman Frederick Zenone outlined his activities as chairman during the past year, involving both his individual work and that of the organization.

He was invited to speak to ICSOM member orchestras in Pittsburgh, Orlando (Florida), and Indianapolis. As a result of these visits, a group of workshops was developed dealing with three topics: organizing your own orchestra (committee organization), understanding your institution, and negotiations.

At the ASOE Conference held in Chicago in June, Zenone spoke with regional managers. He also, together with Tom Hall and Melanie Burrell, participated in a panel on labor relations before the major managers.

June also was the time of the AFM Convention in Phoenix, where the AFM by-law change concerning ratification of our contracts marked a significant event that has been nearly 25 years in the making. This change represents a willingness of Federation officers to do what is right; the subcommittee in Phoenix was willing to hear why we wanted ratification. In addition, the policy recommendation was passed urging reimbursement of delegates to the ICSOM Conference. In response to Zenone's question, two ICSOM delegates indicated that their locals either do not reimburse them, or only reimburse in part. President Fuentealba responded that he would deal with this.

Access to committees at the AFM Convention was easy in contrast to previous years. Zenone and Melanie Burrell, who also attended on behalf of ICSOM, felt useful and welcome. The Federation paid for their hotel and per diem.

Dialogue with major managers was begun this year. Accomplishments so far include a policy statement by managers that ICSOM delegates should be released with pay for Conference attendance.

Trips to New York have been made by the Chairman in order to confer with President Fuentealba, with Counsel, and to participate

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in Federation study groups. Discussions have been held with the Federation, personnel managers, and managers regarding the use of resume tapes.

In addition, Zenone served as co-chairman of the Orchestra Panel for the National Endowment for the Arts. Two policy changes were requested of the NEA by last year's ICSOM Conference, and both have been brought about. Grant sizes will not be affected by work stoppages, and grant size categories will now be determined on an expense basis rather than on an income basis.

The tax case regarding practice studios has been won in the United States Second Circuit Court of Appeals, and has been recently reported in the Sunday New York Times. Chairman Zenone thanked the many orchestras who had responded to ICSOM's appeal for financial help with this case.

John Palanchian, ICSOM Treasurer, was elected to the Vice-presidency of New York Local 802. Zenone remarked that his victory is a bittersweet one for us, representing a loss to ICSOM of his dedication and energy. Lew Waldeck, formerly New York City Opera ICSOM delegate, has also left our ranks to become head of the AFM Symphony Department. In order to fill the Treasurer's vacancy, the ICSOM Executive Committee has appointed Melanie Burrell to serve. Michael Nutt has been selected by the Western Area orchestras to replace Burrell as Western Area Vice-chairman. Nutt has also been serving as a one-person delegation to talk with orchestras in Britain and Amsterdam.

Information within our organization is not flowing as it should and must. Zenone stated that vertical flow exists between officers and orchestras; however, horizontal communication between orchestras is almost non-existent. In addition, vital information is often missing, particularly in such areas as wage charts and arbitrations. Often when we need information and cannot get it, we are in a poor position, and it compromises our ability to do a good job. Zenone stressed that we must do a better job of seeing that information flows.

At this Conference, we will continue in a new direction, that of looking at making alliances and re-examining who may or may not be an adversary. We must balance and re-examine power relationships, realizing that times are intensely different. To achieve qualitative agendas, we must change our institutions; we must become the agents of this change. Musicians must perceive a new relationship for themselves within our organizations. At the same time we know what goes on in other organizations, we must have the sophistication to know our own situations, looking at power relationships in a broader way than in the past. However, if a particular orchestra has not been organized enough to address its material needs, there is little possibility that such an orchestra can address a qualitative agenda. Qualitative issues are much more difficult to organize around than are material issues (i.e. wages and working conditions). Qualitative issues can only follow material issues. During the 1980's the union world will discuss "democratic participation". In this arena, we must use our power to persuade and to ask important questions. On a day-to-day basis we must address qualitative agendas, not merely at negotiation times.



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### Counsel's Report

Printed Counsel's report is contained in the delegate manual.

### Treasurer's Report

Treasurer Melanie Burrell added to the printed report, which is in the delegate manual, by remarking that the Treasurer's work will now be computerized. The General Fund is solvent at this time, per the printed figures. Much travel by ICSOM officers is reflected in the report.

### Strike Fund Trustees' Report

Melanie Burrell, as Strike Fund Trustee, reported that two new orchestras, the Florida Symphony and the Louisville Orchestra, have joined the Strike Fund this year. The AFM Strike Fund is now minus one trustee because of John Palanchian's resignation. Trustees include three AFM officers plus two musicians from participating orchestras. Burrell remains as one of the musician trustees.

Discussion followed concerning an Executive Committee recommendation for Palanchian's replacement, plus alternate trustees. AFM President Victor Fuentealba reminded delegates that only Strike Fund member orchestras could vote on these trustee recommendations.

A motion passed to recommend to the AFM that Henry Shaw be the new AFM Strike Fund musician trustee, to replace John Palanchian, with the further recommendation that alternate trustees be Brad Buckley and Sam Denov (Motion #2, Whyte/Howard).

### Introductions of Officers and Counsel

Chairman Zenone introduced ICSOM officers including Vice-chairman Brad Buckley, Secretary Nancy Griffin, Treasurer Melanie Burrell, and Senza Sordino Editor Tom Hall. Also introduced were Area Vice-chairpersons David Angus (Eastern), Catherine Compton (Central), Patricia Brannon (Southern) and Michael Nutt (Western). Zenone reminded delegates that this is the year for election of Area Vice-chairpersons, and asked that the member orchestras of each area meet separately in order to make recommendations for this year's elections.

Further introductions included Counsel: I. Philip Sipser, Leonard Leibowitz and Liza Hirsch.

San Francisco Opera representative William Klingelhofer was also present at the Conference, in accordance with ICSOM by-laws, as his orchestra is applying for ICSOM membership.

A real Symphony Department has been formed at the AFM, which is what ICSOM has requested. We must remember that the Federation can do much for us, but it also needs us. The Federation needs for us to be visible, active and organized concerning our special needs, thus providing leverage for the Federation to serve us.

Financial difficulties exist in many of our orchestras. It should be noted that there is a strong possibility of a new consortium of foundations which may be a source of significant financial help to orchestras. Previously the Ford Foundation help made a big difference to our organizations. If this type of help is available again, we may stretch and grow, depending upon how our orchestras are prepared to deal with this type of assistance.

Discussion following the Chairman's report included issues of delegate release for ICSOM Conference attendance, and general concerns about communication with and between managements and boards.

#### Vice-chairman's Report

Vice-chairman Brad Buckley's printed report appears in the delegate manual.

#### Secretary's Report

Secretary Nancy Griffin's printed report is in the delegate manual. Griffin reminded delegates to telephone the secretary immediately when contract settlements occur.

#### Senza Sordino Editor's Report

A printed report appears in the delegate manual. Senza Sordino Editor Tom Hall stated that five complimentary copies of Senza Sordino will now be sent to unions and to managers of ICSOM member orchestras. In exchange for the latter, it has been agreed with ASOL that five copies of Symphony magazine will be sent to each ICSOM delegate via the orchestra's office, for use of orchestra members.

Policy has been changed regarding reporting of contract settlements. Detailed reports will now be contained only in the Bulletin, with supplementary material in Senza Sordino. Hall and Secretary Nancy Griffin will meet with delegates from negotiating orchestras for a further discussion of the new settlement reporting procedure.

Hall called attention to the delegate survey, which is included in the manual with the Editor's report. He thanked Henry Shaw and current ICSOM officers for their help and cooperation during his first year as Senza Sordino Editor.

Committee ReportsMendelson Fund

Kathy Picht presented the Mendelson Fund report on behalf of Irving Segall. Because of difficulties in coordination and timing of announcements, no entries were received for this year's Mendelson prize. The Mendelson Fund, a memorial to Ralph Mendelson, provides a prize each year for an essay on labor relations. Money in the Fund was contributed by orchestras throughout the country. Mendelson was a former Chairman of ICSOM and a member of the New York Philharmonic.

Segall is currently working with Dr. John Katz, new Chairman of the American Association of Arts Educators (AAAE), which has administered the Mendelson prize. If a satisfactory system cannot be set up for continuing administration of the Fund, we will switch from AAAE to another administrator.

Electronic MediaNational Public Radio

Chairman Zenone reported that NPR negotiations were held this year. Lew Waldeck, who was an ICSOM delegate during the time of the negotiations, represented the ICSOM Media Committee at the negotiations.

Lew Waldeck reported that NPR had requested a moratorium on costs in the first year, with modest increases after that. Last year's ICSOM Conference had felt that we should go for a guaranteed amount of work rather than stressing economic increases; this was requested. NPR representatives agreed to our request. We were given guarantees of work plus small increases in pay, with provision for larger increases in pay if guarantees of work are not met. During the negotiations, basic information about work and wage history was provided by ICSOM, using media surveys obtained from member orchestras. Waldeck stressed the importance of these surveys.

Recording Contract

The recording contract expires in October. A caucus of recording orchestras will be held later this week.

AFM President Fuentealba noted that the recording business has been doing poorly during the last two years, and he anticipates difficulties at the October negotiations. Recording industry problems include piracy and record-rental stores. Legislative efforts are being made to stop rentals.

MPTF allocations were cut by approximately 30 per cent this past time because of fewer record sales, plus

MPTF Trustee efforts to cut overhead.

Video Contract (A/V Contract)

In preparation for the new negotiations we need information about how the present agreement has worked. The contract, which expires July 31, 1984, has been a strong agreement, but the amount of work available is down. Chairman Zenone urged delegates to provide feedback about the existing A/V contract so that any liabilities can be corrected.

Discussion of various media matters followed. Concern was expressed about the use of taped music for ballet. AFM President Fuentealba stated that this is, indeed, a problem because copyright laws do not protect us regarding use of recordings. Use of taped music is of concern throughout the world; it will be discussed at the FIM Conference to be held in Budapest. Synthesizers also harm us, and we will attempt in negotiations to limit their use. String sections are especially vulnerable, since a synthesizer can replace an entire string section.

TUESDAY MORNING, AUGUST 23, 1983

The Secretary called the roll of member orchestras.

Area Vice-chair election procedure was clarified by Chairman Frederick Zenone. Our by-laws state that these offices are to be filled through election by the body at large. Accordingly, each area will be asked to make recommendations to the entire Conference.

A motion was passed to accept all officers reports (Motion #3, Luker/Shaw).

Application for Membership

The application for ICSOM membership by the San Francisco Opera Orchestra was presented and discussed. William Klingelhoffer, the representative of this orchestra, had already met, as required by ICSOM by-laws, with the Membership Committee (Vice-chairman Brad Buckley, Secretary Nancy Griffin, and Western Area Vice-chairman Michael Nutt).

A motion was passed to accept the San Francisco Opera Orchestra into ICSOM membership (Motion #4, Whyte/Howard).

Klingelhoffer, who had been excused during the discussion, was invited back into the meeting and given an official welcome on behalf of his orchestra.

Abe Torchinsky, Retired Musician, Philadelphia Orchestra:  
Remarks

Abe Torchinsky expressed the feeling that we need to encourage retired members to have a closer affiliation with ICSOM. Many who leave our orchestras are cut off from further contact with their colleagues. He suggested that ICSOM establish an emeritus membership category, which would basically involve recognition of these members. The ICSOM Directory might include their names, and they could receive copies of Senza Sordino.

Delegates discussed the matter and agreed that ICSOM would like to do something on behalf of our retired colleagues. The first step will be for delegates to get lists of names and addresses of musicians retired from their orchestras. These musicians can then be contacted by Torchinsky to determine their interest in a continuing affiliation with ICSOM. Chairman Zenone asked Torchinsky to take charge of implementing this.

Various additional suggestions were made, such as including retirees in group instrument insurance, and providing advice about pension options. Delegates shared information about activities in their orchestras which have helped to provide funds for retirees.

A motion passed directing the Chairman to appoint a committee to look into the matter of retired members' affiliation with ICSOM (Motion #5, Moore/Beckerman).

Foreign Orchestras

Michael Nutt, as directed by the 1982 ICSOM Conference, provided an update on British protectionist policies which affect London appearances by U.S. orchestras. Nutt described the restrictions which apply to London orchestras in their own city; five major orchestras exist in London and must compete for audiences and use of repertoire. All London orchestras are limited to two concerts each per week, and programming is controlled by a "clash list". Decisions about activities of visiting orchestras are made by VOCA (Visiting Orchestras Concert Association). Although a compromise was worked out for the Los Angeles Philharmonic, that orchestra's London concerts were eventually cancelled due to the illness of the conductor.

Extensive contacts with orchestras throughout the United Kingdom and in Amsterdam were also made by Nutt. He visited a total of 20 British orchestras, and reported that while London's orchestras operate on a free-lance basis, the union negotiates one contract for all regional orchestras. He found that orchestra committee chairmen of British orchestras are not in touch with each other; their only contact occurs at a semi-annual union meeting. Nutt compiled a list of committee chairmen and their addresses for those orchestras he visited, and sent it to each of the orchestras. All United Kingdom orchestras contacted were

interested in promoting communication with ICSOM.

In Amsterdam, the Concertgebouw Orchestra reported an excellent response to telegrams which ICSOM orchestras had sent to the Dutch Parliament, following the Concertgebouw's request for our help in fighting personnel cutbacks last year. This orchestra was especially interested in knowing more about our working conditions, and expressed enthusiasm for the efforts at communication that ICSOM is making.

Chairman Zenone stressed that what we want is colleague-to-colleague contact, so that we can share information with each other. Strong unions exist on both continents, and FIM is an available resource. However, ICSOM can provide a unique network whereby information can flow freely between colleagues. Zenone emphasized that any contacts with foreign orchestras should be made through him and Nutt. Contacts with Australian orchestras were also discussed. Michael Moore offered to be a resource for anyone traveling to Australia. Again, in any cases of communication, Zenone should be contacted first to determine what is and what is not appropriate for us to do.

#### TUESDAY AFTERNOON, AUGUST 23, 1983

##### John Palanchian Welcome

Chairman Zenone introduced and welcomed John Palanchian, recently retired treasurer of ICSOM, who is now Vice-president of New York Local 802.

##### Auditions Committee Report

Brad Buckley reported on behalf of the ICSOM Auditions Committee, which includes Penny Anderson, Gordon Peters, Michael Nutt and Buckley. Investigations of auditions have been conducted in response to a paper sent by Gordon Peters to the 1982 ICSOM Conference, and also as a part of the concerns of the Major Managers-ICSOM Liason Committee. Thus, the investigation process was a twofold one, with information being shared between committees. Much material was available about problems with current audition practices. The committee decided to seek positive ways to influence the situation, realizing that each orchestra has its own master agreement and its own way of conducting its business.

Therefore, the committee decided to adopt a four part approach, including (1) a set of guidelines for auditions, (2) a national code of ethical auditions practises, (3) a central file at the Federation of orchestra openings, and (4) a booklet about auditions. The code of ethical auditions practises is currently being written, and could possibly be signed by the Federation, ICSOM, managers, and ASOL. The file of orchestra openings is in effect being accomplished, with Lew Waldeck setting up the information which could be available via a toll-free number. The Federation is agreeable to cooperating with this service. The booklet about auditions could be patterned after a similar Canadian effort, which prepares musicians for what to expect in auditioning for a Canadian orchestra.

Discussions with managers indicate that we are agreed that all parties are interested in fair, well-administered auditions which will result in getting the best player for a given opening. Local audition practises and difficulties were addressed; Chairman Zenone stressed that we would not intrude on any locally bargainable issues.

### Taped Resumes

Concern has been expressed by both orchestras and managements over the expense of air fare for auditionees, as well as the overload of work for auditions committees. Taped resumes might be used in addition to written resumes to demonstrate a level of ability by a player, i.e. whether he/she is at a level to audition for that orchestra.

Brad Buckley stressed that such a resume would not be an audition; it would be followed by the regular audition procedure. If such taped resumes are used, they should be standardized in some way as to length and content. Perhaps a part of a concerto or short solo could be included, plus three or four orchestral excerpts. The list of excerpts could be changed every year or two in order to keep the taped resumes current. Cooperation of orchestras would be needed to make up repertoire lists. Anonymity should be preserved and the tape should remain the property of the applicant (and be returned to him/her after the audition). Delegates discussed various concerns about taped resumes, and shared information about existing taping practises.

### Amalgamation of Medical Benefits

Charles Underwood reported on behalf of a committee which includes Irving Segall, Steve Cohen and Underwood. A questionnaire has been distributed to ICSOM orchestras which are currently under medical plans; 18 orchestras have responded so far, with more responses definitely needed. Information compiled to date is on file with Counsel's office. Once more information is available, actuarial analysis will be done, and an attempt will be made to determine whether such an amalgamation would be feasible. The subject has also been considered together with the Major Managers-ICSOM Liason Committee.

### Legislative Action

Carolyn Parks outlined how she had investigated and initiated legislative activities in the Washington, D.C. area, beginning with contacts through the labor movement. The Central Labor Council gave good cooperation. Her contacts with the State Federation (Maryland) revealed that legislative work is their primary activity; they will help to provide support and information about how to work with legislators and how to determine who is/is not friendly to us. The State Federation also holds conferences and educational activities.

At the national level, the AFL-CIO lobbying efforts are similar in purpose to those of the State Federation. Grass roots (constituent) lobbying is a most effective technique. The Senate Interior Subcommittee deals with NEA appropriations.

Parks handed out printouts which indicated legislators in each of our areas. Written instructions will be provided about how to contact these legislators.

Eleven orchestras so far have legislative liason persons; it is assumed that the ICSOM delegate will do this work in the other orchestras.

Parks will provide us with information about our legislators' labor voting record (obtained from the AFL-CIO). We should send to her copies of all relevant communication on legislative action, so that information can be shared. Our natural allies exist in the labor movement, and we were urged to be involved with fellow union members. We should also get to know other labor movements; contact should be made by going to our local unions first to get introductions and to let them know what we want to do. "Unnatural" allies also exist who can be helpful to us; these include our boards, managements, ASOL and Republicans (some of whom are arts supporters).

Discussion followed about how to make contacts with legislators. Lew Waldeck noted that each state has an AFM legislative director, whose name can be obtained from our local union. Parks will give our addresses to COPE so that we can receive their mailings.

Chairman Zenone reminded delegates that this is an enormous and vitally important subject. We must keep in touch with Parks.

Eddy Bayens, Chairman of the Symphony Department of the Canadian Conference was introduced by Chairman Zenone.

#### Association for Union Democracy

Melanie Burrell had attended a conference in Berkeley, California, of the Association for Union Democracy. This is a group of unionists who believe that changes are needed within the union movement, and who urge a return to the principals upon which unions were founded. Members of many types of unions attended the conference; all were concerned with learning why some unions have lost their ideals. The ethical practises portion of the AFL-CIO code notes that "freedom and democracy are central to our union movement." In spite of this, the last 30 years have seen a history of corruption, killings, mob scenes and loss of freedom. Many areas need reform; problems are created by the size and age of union organizations.

AUD wants to disseminate information to people who feel that there can be improvement and change. Subjects addressed at the AUD conference included due process and public review; free speech and fair elections in unions; experiences of AUD lawyers; shop stewards and officers; and rights of public employees.



AUD is interested in and refers to ICSOM as a model association of union people, Burrell reported. Chairman Zenone noted that AUD's references are not just to ICSOM, but to organizations that can deal with a healthy level of dissent within the organization. He further noted that ICSOM is within the AFM, and therefore the AFM is the organization that tolerates the dissent.

#### Major Managers-ICSOM Liason Committee

Chairman Zenone reported on discussions with the Major Managers. These talks were begun as a result of a challenge set forth at last year's ICSOM Conference to Ernest Fleischmann, then Chairman of the Major Managers Policy Committee. Meetings have been held three times this season, each time limited to a pre-agreed/arranged agenda. Results have included a policy statement that ICSOM delegates should be released with pay to attend ICSOM Conferences. Other areas addressed have included arts funding legislation, an auditions questionnaire (filled out by managers at the ASOL Conference), investigation of amalgamation of pension investments and medical coverage, personnel managers, management consulting teams, A.T. and T. touring program, and musician exchange programs.

#### OCSM Conference

Brad Buckley, who had attended the recent OCSM Conference in Montreal as the ICSOM observer, reported on similarities and differences between the conferences held by ICSOM and OCSM. He cautioned us not to think of Canada as the 53rd State; we must realize that Canadians have a particular set of problems and they must deal with them in their own way. It is important for us to mutually respect each other's approaches. Government aid and support for the arts is not the ultimate answer, since what gives with one hand can take away with the other hand. Wage increases are decreed and limited under such a system, especially in the case of the CBC. Auditions involve the issue of discrimination in favor of Canadians; better understanding of both sides is important. Conductor evaluations are handled much like ours.

#### Alan Wood, Vice-president from Canada, AFM: Address

Alan Wood, who was the official representative for the Federation at these meetings, congratulated the Conference on how well its business is handled. He was impressed with our delegate kit, and noted that this is one of the finest conferences in the Federation with respect to agenda and reports. He recalled that at the 1965 ICSOM Conference in Toronto, he and Henry Shaw were the only members of the present group in attendance. No female representatives attended in 1965; he was glad to see an improvement in this situation.

The Congress of Strings is observing its 25th anniversary. Over 400 graduates of this important Federation program are currently playing in professional orchestras in the United States. Wood has been added to the committee for the 25th anniversary, and noted that many students come from Canada.

A COS alumni association has been founded, starting with seed money provided by Gary Karr. Officers have been elected (including Karr as president) and graduates will be contacted about the alumni organization. The future of COS is not clear, since funding of scholarships by locals may be in jeopardy where locals themselves are in trouble. ICSOM has given a scholarship to COS. Wood would like to see a representative of ICSOM on the COS committee, since our orchestras are the recipients of COS graduates.

Wood reported that taped auditions were discussed at the meeting of personnel managers in Toronto. He said that the personnel managers perceive taped auditions as a screening device, not an audition. Problems and concerns discussed in Toronto were similar to what we have noted at this Conference. The Federation is willing to help with a pamphlet about auditions, as discussed earlier under the Audition Committee report.

FIM (International Federation of Musicians) meetings will be held in Budapest, Hungary the week of September 17th. Wood will attend, together with three other AFM representatives. Although we have been in attendance at FIM board meetings, this will be our first international convention. FIM includes 57 member countries, including countries behind the Iron Curtain.

Two resolutions of concern to us (or to be proposed by us) at the FIM meeting are (1) international support for strikes, and (2) an international committee structure for broadcast and recordings. Wood noted that the broadcast situation is the bigger problem, as we have seen on our foreign tours. The film industry is another problem area.

At the British Musicians Union Convention, which occurs every two years, we have seen that this union is very political and is very involved in the labor movement. Much money has been spent (together with a Midlands construction organization) to completely sponsor one Labor Party member. London musicians are especially powerful in the British Musicians Union.

The Federation will be involved in negotiations this year. Phonograph recording negotiations are scheduled for October; it is expected that these meetings will not be easy, and that the industry will want to get rid of MPTF and the Special Payments Fund. Other negotiations include theatrical, motion pictures and TV film; videotape syndication; and the audiovisual agreement. Wood praised the ICSOM Media Committee, stating that the Federation relies on this committee and values its input.

Wood closed by expressing appreciation and pleasure in working with ICSOM and its officers. He said that ICSOM and the Federation are no longer apart, if, indeed, they ever were; we are all one unit.

Brief questions and answers followed Wood's address.

### Medical Conference

Melanie Burrell reported on a July conference held at Aspen concerning medical disabilities of musicians. Musicians' medicine is a new field, and is related to sports medicine. Physicians involved include neurologists, orthopedic surgeons and motor control specialists. This particular meeting focused on upper extremities, including mouth and face, and involved teaching sessions for doctors who have not yet dealt with these problems. Musicians have historically been reluctant to talk about their medical problems and about disabilities caused by playing, as well as those caused by accidents. In the past, musicians have not had credibility with physicians, and have been thought to be neurotic by doctors who have not had information about these special problems. The conference was designed to provide this information. Burrell noted that musicians often have a feeling of desperation about their problems, going from doctor to doctor in an attempt to continue playing. Harvard Medical School and Massachusetts General Hospital now have a new program which deals with this specialty; already there is a six month waiting list of patients. Eventually clinics may also be opened in Cincinnati and Denver. We may see a proliferation of the practice of musicians' medicine.

Talks at the conference were basically about pain, and represented a fascinating collaboration of Aspen music teachers (of both piano and strings) and physicians. Videotapes were shown of musicians as they play, in order to study problems of stance. Gary Graffman participated and was willing to discuss openly the problems he has had with his right hand. Demonstrations and talks were also provided in the areas of non-traditional therapies. Burrell stressed to physicians that musicians need anonymity in any studies that are being done. Larry Fader said that a study is currently being done in New York with string players (including guitar and harp), involving both those with and without problems. More test subjects are needed for these studies.

The Aspen Conference did not address the subject of hearing loss. However, Lew Waldeck reported that the Federation is beginning to deal with this subject.

### Congress of Strings

Chairman Zenone said that we are being asked for input and guidance by the AFM regarding the Congress of Strings. The ICSOM Executive Committee had decided to contribute one COS scholarship on behalf of ICSOM this year. Discussion by delegates concerned making the scholarship a memorial to George Zazofsky.

It was moved to make the scholarship a memorial to George Zazofsky (Motion #6, Newa/Muggeridge); it was amended to designate that the scholarship be called the "George Zazofsky ICSOM Scholarship" (Bocaner/Ross). The amendment and motion were passed, reading that ICSOM provide a \$500 per year Congress of Strings scholarship, to be called the "George Zazofsky ICSOM Scholarship".

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Since our professional expertise and advice for the Congress of Strings is being requested by the AFM, Chairman Zenone asked for volunteers to help with this matter. Delegates interested in serving on a committee for this purpose were asked to leave their names with him.

### Negotiations Reports

Reports were given on behalf of the following orchestras whose negotiations are in progress:

New York City Ballet (Larry Fader)  
Milwaukee (Elizabeth Tuma)  
Dallas (Doug Howard)  
San Francisco Ballet (Mitchell Ross)  
Syracuse (Steve Lawlis)  
Oakland (Dave Burkhardt)  
Cincinnati (Henry Shaw)  
Seattle (Marilyn Garner)  
San Diego (Lynn Johnson)  
Honolulu (Mark Schubert)  
Utah (Lisa Allyn)  
Rochester (Dave Angus)  
Atlanta (Michael Moore)  
North Carolina (Terry Mizesko)  
New York City Opera (Richard Beeson)  
Boston (Jay Wadenpfuhl)  
Cleveland (Jim Darling)  
Oklahoma (Kyle Champion)

WEDNESDAY MORNING, AUGUST 24, 1983

The secretary called the roll of member orchestras.

Stephen Sell and Henry Fogel, Speakers: Financial Analysis, A  
Working Primer

Chairman Zenone introduced Henry Fogel, Executive Director of the National Symphony and Stephen Sell, Executive Director of the Philadelphia Orchestra. Both are members of the Major Managers-ICSOM Liason Committee.

Symphony orchestras were described by Sell and Fogel as businesses, with many similarities to profit-making corporations. In these discussions it was assumed that material about symphony orchestras would also apply to opera and ballet orchestras.

A board of directors, consisting of citizens from the community, is responsible for corporations, with similar law prevailing in both profit and non-profit situations. In both cases, individual board members bear fiscal responsibility. The board decides policy and is the ultimate authority. Differences lie in responsibilities to "stockholders", since in a profit-making situation the board can be voted in or out. Non-profit boards, while elected, tend to perpetuate themselves via nominating committees. Elections are usually pro forma.

Since non-profit boards are not full-time employees, they must hire professional staff to run their organizations, while the board itself retains responsibility for making policy and for providing money to carry out the purposes of the organization. A manager is hired by, reports to, and is accountable to the board. This person, in turn, hires the rest of the staff. An individual manager's future depends upon the quality of his/her performance or the board's interpretation of that performance; managers come and go at the pleasure of the board. In addition, the board has the authority to engage the music director.

In the profit sector, boards consist of professionals in the field with which the board is concerned, so that people with like interests and experience are involved. Non-profit boards tend, at best, to provide an assortment of professional experience in a number of fields. Since the board is charged with fund-raising, many people on the board may have no idea of how to make policy. The manager must stay far enough ahead of the board to lead, but not so far that he/she leaves the board behind. Since most symphony boards have required rotation, there is a constant need to educate new people.

While the process is similar between the two types of boards, the philosophy is different. Goals in non-profit situations may not necessarily include saving money. We were reminded again that (for example) General Motors exists to make money, not cars; symphony orchestras exist to make music, with money being a means to accomplishing that goal.

Methods of electing symphony board members were discussed, as were by-laws. Unfortunately, policy and philosophy may often be created by default.

Further differences are seen in that non-profit boards must participate in raising much capital. This responsibility may be a shock to new board members, when they learn that the average ratio of income to expense is about 50 per cent. Profit-making boards actually have less responsibility, since they raise capital on the premise that stock will earn money, will pay dividends, and can be sold if need be.

Staff positions in symphony orchestras correspond to those in any organization, including full-cycle manufacturing, wholesaling and retailing. The hall, whether owned or rented is the "factory" where music is produced so that it can be "sold" to subscribers

and sponsors (wholesaling) and to single ticket buyers (retailing). Orchestras are multimillion dollar organizations, with enormous amounts of money and pensions to manage.

Development functions, whereby capital is generated, differ from the profit sector. Much generating of capital is done by volunteers, but must be planned and supervised by staff. Development departments are an innovation of the past 15 years, as fund-raising becomes more necessary and sophisticated, and orchestras are often now full-time operations which have grown to a point requiring this professional staff.

Financial management material presented by Sell and Fogel included definitions of relevant terminology such as audit, management letter, assets, and balance sheet. Balance sheets were available for ICSOM orchestras so that delegates could follow the discussion by referring to figures from their own orchestras. A sample balance sheet from an ICSOM orchestra was examined and explained line by line. Other terms used and defined in the explanation included short-term investments, accounts receivable, prepaid expenses, current liabilities, accrued expenses, and deferred income. Listing of equipment and real estate was described. A second balance sheet from a different type of organization was presented and examined. Further terms included restricted and unrestricted funds and accumulated deficit. It was noted that in most non-profit corporations, the weakest area of management is in expenditure control.

Endowment funds were discussed. If endowment drops (i.e. if these funds are used to pay bills), the organization is in trouble. In certain cases there are justifications for using endowment assets if a plan exists to pay back the money; correctly this would then appear as a loan. Two kinds of endowments are donor-specified use, and unrestricted or "board designated". Endowment funds should grow each year to keep pace with inflation. Endowment drives are difficult to get the board to do, because they involve such large amounts of money. Successful orchestras in this country have 11-14 per cent in income from the endowment. For example, a \$10 million budget should have an endowment of \$14-15 million; a \$4 million budget should have a \$5 million endowment to get this amount of income.

Legally, a non-profit corporation is defined as a corporation organized to accomplish certain purposes, with no portion of earnings distributed to any member of the corporation. If profits exist, they must be used to continue the purpose of the organization.

WEDNESDAY AFTERNOON, AUGUST 24, 1983

Financial analysis talks and discussions continued, featuring Stephen Sell and Henry Fogel.

The operating budget of an ICSOM orchestra was examined for expenses related to "the product" (artistic personnel, performances, tours, hall, education, promotion) and its administration (general administration, fund-raising and special events). Income was broken down into contributed income (from the board, other individuals, corporations, foundations, women's committee, and other special sources), plus government grants, investment income, and earned income (ticket sales and fees).

Endowment campaign strategies were described. An outside consultant may be helpful in some cases, acting in an impartial and non-involved professional capacity. The board itself may be the most difficult to convince of the need for an endowment drive. In a combined endowment drive, donors are asked to allocate a part of their gifts to debt retirement; where the organization is in debt, the debt must either be erased first or dealt with in such a combined drive. Endowment funds cannot be raised from a large debt position.

Each 30 days the manager must update the budget, making short-term projections, together with the long-term concepts (5 years).

Examination of the sample operating budget continued, focusing on the monthly review process.

Development department activities were discussed, including "donor cultivation" items such as parties. Such activities involve spending money, but are important in raising the levels of giving.

Financial reporting to the board varies in frequency and detail of content, depending upon the situation. More frequent reporting is needed if the organization is close to the line economically; less is necessary if it is in better shape. Where trouble is seen, there must be frequent reports.

Tours may not earn money, even with corporate underwriting, but are needed for prestige, reputation and ticket sales. Decisions about such matters are very subjective and involve a mix of artistic and non-artistic reasons. Priorities must be established based on long-range expectations of results.

Questions and discussion dealt with ticket prices vs. fees, sponsored events, audience development, and European orchestras in America.

Summarizing the financial report discussion, the speakers pointed out that local context must always be brought into any examination of a given financial report. Information should be available

regarding the context of choices (what choices and why); asking for such information is a constructive service. We may discover logical answers, or we may discover that the board and management have not thought these things through and there are, indeed, no answers.

A negative trend shows that the organization is in trouble. In such cases, interested musicians can attempt to meet with leaders of the organization and discuss in a constructive way whether they are aware of the situation and whether there are plans to make changes. Atmosphere for such talks can be created, and the talks can be constructive. This is especially true if discussions are not at contract negotiations time.

In some cases information may be difficult to get from managements. Although we are entering a more mature phase in our industry, some managements still believe that musicians are adversaries. Therefore, it is important for musicians to build confidence and credibility and to show that they are interested in the health of the institution for everyone's sake. This is a process of attitude change on both sides; attitudes are deeply entrenched and may change only slowly and reluctantly. The minority must help to bring about change. Historically, musicians have had only negative power, i.e. the right to stop something. Therefore, the board and management may act reflexively. Our approach must be different in order to avoid this reflex. Forums to bring people together in non-confrontive situations can help to start dialogue. Beginning even in a social situation may lead to regular meetings of a non-social nature. Both sides must stop seeing in stereotypes, and gradually change their attitudes.

Orchestras should have long-range plans. Suggestions were made by the speakers about how to involve musicians in such planning. Where this has been done, orchestra input has been insightful and constructive. The question arises, when musicians are involved in planning, about where ultimate responsibility rests. The answer is that responsibility is always with the board of directors. Various ways of involving the orchestra in planning were addressed. Musicians may have to locate receptive board members and make things happen from within.

The case of a large major orchestra was discussed, addressing the fundamental philosophical issue of whether we exist to sell a product or to provide service to the community. An orchestra such as this is in a unique and difficult position. To the outside observer its circumstances would seem ideal, including a 52 week season, an apparently good economic situation, recording contracts, and general good health in the short-range view. However, there is no potential for increase in such a situation. The orchestra has virtually topped-out on earned income (there is no way to sell additional tickets), and recording royalties are declining. In the past, because of the previous situation with royalties from many recordings, the board has been relieved of responsibility for large fund-raising efforts. The full winter season can only bear a certain percentage of costs; it would appear that new audiences



must be found and the summer season must be built up. Summer work at present consists of a total of 9 weeks involving 3 separate outside parties over which the orchestra has no control. Thus, efforts must center around summer work, and also around creating a different approach to electronic media work. The board must make a long-range plan, and not just deal with the difficulties which may occur within the next year or so.

Philosophies and priorities must be set first; numbers come after that. The planning process was discussed relative to solving the sort of crisis which had occurred earlier in the National Symphony. The short-range crisis had to be solved before any long-range planning could occur. A \$2 million deficit, plus cash flow problems existed. Musicians and staff worked together to solve the short-range problems and to begin approaching the long-range goals.

Prioritization of where to spend money must always be examined in terms of local context. We must look at our own organizations in order to build larger context.

Discussion and questions addressed issues of income, endowment and annual giving campaigns.

WEDNESDAY EVENING, August 24, 1983

#### John Palanchian Tribute

Chairman Zenone opened the session by introducing and paying tribute to John Palanchian, recently retired as ICSOM Treasurer after 10 years of service. Palanchian had also served as a Strike Fund Trustee. Zenone characterized Palanchian as a real leader with dedication, energy and strength. His election to the Vice-presidency of Local 802 was a bittersweet moment for us, because we thereby lost one of our most important ICSOM leaders. It is difficult to go through a Conference without Palanchian's presence and leadership. A gift was presented to Palanchian on behalf of the Executive Committee.

Palanchian responded by reminding us that his victory would not have been possible without ICSOM. He urged delegates to remember that it is possible to get responsible, honest, intelligent representation in their locals. If any of us feel that we are not being properly represented, Palanchian will help by providing information and support. It is not an easy task, and requires tremendous organizing, but is well worth it. Palanchian hoped that Local 802 would not be the only one to produce needed changes in leadership.

The Conference gave Palanchian an ovation after his remarks.

Stephen Sell and Henry Fogel, Speakers: Financial Analysis Workshop, An Open Forum

A question and answer session dealt frankly with concerns of delegates. Conductor evaluations were discussed at length.

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Manager search efforts were also of concern; such a search should begin with a clear job description. The board should be encouraged to include and consult with musicians in a manager search.

Boards can be approached through accessible individuals, or through the collective bargaining process. In the latter case, musicians can insist on ways to improve the situation and the means to carry them out. Communication with the board is the key issue. Leadership is a process, not a fact. In such a process, which is political, time must be spent with people, involving them in the process, so that they can then take responsibility.

Management consultant teams were discussed. Also discussed were hiring of conductors and guest conductors, and guest artists, as well as programming.

Discussions between major managers and ICSOM officers via the Major Managers-ICSOM Liason Committee have provided a forum for airing of problems. These discussions were started partly as a result of media negotiations, with impetus being provided at last year's ICSOM Conference in Los Angeles. Ernest Fleischmann was instrumental in getting the meetings started.

We were urged by the speakers to remember that if a meeting of minds can occur at the philosophical level, it can have a profound influence on collective bargaining. An orchestra is made up of accumulated experience. Musicians have ideas concerning the quality of their workplace and their mission which transcend collective bargaining. If there is philosophical agreement that we cannot accomplish our mission under particular conditions, creative solutions must be sought.

Management needs artistic sensitivity and knowledge, since there is no business decision in a symphony orchestra which does not have artistic implications. The reverse is also true.

We were cautioned that although the euphoria which comes from this conference generates many good feelings, real changes will take time.

#### THURSDAY MORNING, AUGUST 25, 1983

The secretary called the roll of member orchestras.

#### Lew Waldeck, Assistant to the President, AFM: Report

Lew Waldeck described the evolution of his job as head of the AFM Symphony Department. President Fuentealba has been most supportive in encouraging Waldeck to create and implement his own activities on behalf of symphony musicians. Relationships between local unions and symphony orchestras have been poor in many instances; Waldeck is attempting to point out to locals how things have changed and how conditions can be improved. Symphony musicians have been much maligned and misunderstood in some local situations, indicating that better communication is needed.

The NEA now requires that anyone who accepts an NEA grant must pay local union scale to everyone in the orchestra, union and non-union alike. This is a problem for the smaller orchestras; it does not tend to occur in ICSOM orchestras since our contracts specify our scale. San Francisco Ballet management created difficulties when it went to England to hire musicians to make tapes for a Dance in America program, in an effort to save money. Waldeck and ICSOM Chairman Zenone went to the NEA about this; NEA will go to its Policy Panel and ask for a policy which will prevent a repetition of this situation. Both NEA and Channel 13 (NET) are in trouble because of failure to pay scale. A settlement in this case is being negotiated. We will be notified by bulletin once there is a settlement.

Nationwide resistance exists where ballet companies use tapes. Picketing has occurred when tapes are used. FIM is also involved in these efforts. Leafleting and picketing activities directed against the Alvin Ailey Company, which is notorious for its use of tapes, were recently coordinated between New York and Paris.

Much of Waldeck's work consists of serving the smaller orchestras, who are not eligible for ICSOM membership and have not had this amount of help in the past. Many resources are now being made available to them.

Health projects have been started involving the Federation Symphony Department. Hearing loss is being studied at Montefiore Hospital's Occupational Health Division. Normal level data is needed, and large numbers of people must be tested to provide this information. The Federation will help to fund this research. Asbestos continues to be a danger in many buildings. A printed information sheet about asbestos was made available to delegates, which includes descriptions of various asbestos tests. Waldeck cautioned that testing personnel should be protected, and masks should be used. The Vienna study on stress is available; Tom Hall has copies of this material.

Media charts are made up from media card information sent in by delegates. We must send these cards in every time we do media work. Even if we do not do any media work at all, we should send in at least one card a year so that Waldeck knows where the work is being done. Chairman Zenone reminded us that this is an ICSOM project, started by Waldeck when he was with ICSOM. The project continues, with assistance from the Federation computer.

Pension questionnaires have been sent by Waldeck to all orchestras who have private pensions (as indicated on A and B Charts). Waldeck has prepared a chart from the 18 questionnaires which were returned (out of a total of 36). Next year there will be two different pension questionnaires, one going to those who responded this year (dealing with additional information), and another going to all others (including all of the required information). Now that the Federation has provided staff, we can make good use of information, but we need delegate cooperation to gather that information.

Information from delegates for A and B Charts has often arrived late; this year's closing date will be October 15th. Orchestras whose forms arrive after that time will not be included in the chart. Vice-chairman Buckley suggested that in filling out the forms, much information may be transferable from the previous form. Information can be gotten from management simply by giving them the form and asking them to fill out the relevant parts. Buckley will help delegates in cases where management is reluctant to cooperate. In orchestras where negotiations are still in progress at the time of the Chart deadline, the delegate should contact Waldeck to discuss the situation. A and B Chart forms were handed out to each orchestra's delegate. Waldeck added that the entire questionnaire will be revised after this year.

Chairman Zenone observed that the AFM Symphony Department is very busy, with Waldeck doing much traveling in addition to his work in the office. Maynard Yost acts as administrative assistant to Lew. It is important that we make an effort to keep in touch with the Symphony Department, so that they know when we are negotiating and when settlements occur. Much information is exchanged between Zenone and Waldeck.

In cases where an orchestra would like Waldeck's help with negotiations, the local union should write to President Fuentealba requesting assistance. A decision can then be made together as to where Waldeck is most needed and best able to help. Waldeck prefers not to do entire negotiations, but can give a great deal of assistance.

We were again reminded that, according to the new Federation by-law effective September 15, 1983, all symphony, opera and ballet companies with master agreements are required to ratify by a majority of those members voting.

Waldeck responded to numerous questions from delegates.

#### Henry Fogel and Stephen Sell, Artistic Concerns: A Discussion

A music director needs both musical and other sorts of qualifications. As conductor and musical administrator, he or she is responsible for the musical shape of the organization, including quality of performance, programming, soloists, guest conductor programs, and personnel. Other qualifications involve dealing with the audience and the community, fund-raising, and administrative activities. Social functions as a means of promotion and fund-raising have grown in importance; the music director must be willing to take part in these activities.

Delegates discussed the role of orchestra members themselves in social functions, and in helping to promote the orchestra in these situations. Often invitations are extended only to first-chair players. Sell stated that the Philadelphia Orchestra no longer accepts such restricted invitations, preferring to distribute the social activities among orchestra members. This rotating plan has worked well in other cities as well, and hosts seem willing to cooperate.

It is important to strengthen and promote the concept of the orchestra itself, rather than that of music-director-and-orchestra. Devices for such promotion include pictures on brochures and records which will

help to market the musicians , pictures and short biographies of musicians in the program, soloists from the orchestra, etc. Radiothons where the majority of guests are members of the orchestra have been effective; musicians can also serve well as hosts and are in this way humanized for listeners.

Relationships between music director and manager are different now than 20 years ago, as the role of the music director has become somewhat less a full-time resident one. Conductors need advice and they also need help with artistic administration; therefore the executive director must assume increased artistic responsibility. Delegates discussed the possible role of orchestra musicians as artistic advisors; various sorts of artistic advisory committees in existence do include musicians. Delegates and speakers shared information about existing situations.

Guest conductor selection and guest conductor programming were addressed. The music director must be involved in guest programming in order to ensure a balanced season.

Contemporary music, especially American music, is often encouraged, for example by the NEA. Opinions were expressed about whether repertoire requirements should be imposed on grant applicants. Inclusion of contemporary music should be based on artistic quality, not quantity.

Pop concerts are a continual problem for many orchestras. Summer seasons are a part of the picture in considering the importance and economic position of pops concerts. Pops concerts were seen as an economic necessity in many cases, but they should be combined with a commitment to lengthen and/or strengthen other parts of the orchestra's activities such as subscription series. Quality of pops concerts is important, and we should look for ways to make these concerts more palatable to musicians. It appears that there is little crossover between pops and subscription audiences.

A principal guest conductor can be a useful role, especially when the music director is absent much of the time. The level of leadership and maintenance of quality can be helped by a principal guest conductor. However, in some situations, especially where the music director is less well known, the presence of a principal guest conductor might actually interfere with people getting to know the music director. Other factors influencing decisions about a principal guest conductor might include scheduling, availability of conductors, and balance between strong leanings toward certain types of music on the part of music director and principal guest conductor.

Soloists can impact sales. Division of programs between series must be done with careful distribution of soloists.

Youth concerts are not always adequate. Managements often see youth concerts as low-priority and non-lucrative activities. We are not yet sure whether there is a correlation between youth concert attendance and subsequent attendance at adult concerts.

Tax Case: Deduction for Home Practise Studio

Counsel I. Philip Sipser outlined the history of the tax case, which was decided in our favor on August 19, 1983 by the United States Second Circuit Court of Appeals. An article about the case appeared in a recent edition of the New York Times.

Previously the IRS had disallowed three Metropolitan Opera Orchestra musicians a deduction for home studios used exclusively for practising. This decision had been upheld in the United States Tax Court, with six judges dissenting. ICSOM agreed to help appeal this ruling, and funds were contributed by 34 ICSOM orchestras to fund the appeal. This support came in response to a letter to all ICSOM member orchestras from Chairman Zenone asking for such participation.

The case was prepared by Sipser's firm, together with tax lawyers; Jill Hanson wrote the amicus brief which was filed on behalf of ICSOM. The case was argued before the United States Second Circuit Court in New York. (There are a total of 10 circuits throughout the country.) In a unanimous decision, the Tax Court's decision was reversed, and a home practise studio deduction was thereby allowed. Sipser reviewed contents of the brief for delegates; each delegate received a copy for his/her own orchestra's use. History of the original tax court ruling was also presented.

It was stressed in the brief that as employees we must practise 30-32 hours a week for the convenience of our employers, and that our employers do not provide facilities for such practise. Practise is required to maintain, refine, and perfect our skills, and to perfect our parts prior to rehearsal for a performance.

Sipser pointed out that the case may now be appealed by the Commissioner of the IRS either to the full bench of the Circuit Court of Appeals, or to the United States Supreme Court, or to both. He urged us to get local tax advice in any case if we decide to amend an earlier tax return, or in preparing a new return to include this practise studio deduction. Information about the tax case will appear in the October issue of Senza Sordino, and Sipser's office will keep us informed of any further developments in the case. He will welcome phone calls from any of us who need further information.

He reminded us that this is a critically important victory for all musicians; it was won with the help of ICSOM and its constituent orchestras. However, decisions about the use of this deduction will be up to individual musicians. ICSOM is not advising anyone what to do, but rather is informing us of what our rights are. Exercising these rights is an individual decision.

Counsel Sipser reported later in the Conference that material about our tax case appears on the front page of the current Law Journal.

FRIDAY MORNING, AUGUST 26, 1983

The secretary called the roll of member orchestras.

Announcements included the information that from now on, the secretary will mail two copies of each bulletin to every delegate, so that one copy will be available for posting and one for the file.

Temporary delegate lists were provided.

Melanie Burrell announced that maternity, paternity and parental contract clauses are available from Counsel's office. Burrell also said that printed Strike Fund report information is now available.

Individual orchestra negotiating situations were discussed. Delegates and officers addressed the issue of how we may use letters and mailgrams to best advantage in strike and lockout situations. Chairman Zenone indicated that we should always see that the musicians receive copies of our correspondence and/or mailgrams which we send to their boards, managements, legislators, etc. This will give orchestra committees in the striking or locked-out orchestras the option of deciding how to use this material. Zenone reminded us that our efforts in supporting our colleagues with such communications are for the purpose of letting the "powers that be" know that the situation is receiving national attention. An additional and equally important purpose, he stated, is to provide morale support for members of the orchestra, by letting them know that other orchestras care.

New York City Opera Orchestra musicians need our help at this time with letters and mailgrams during their strike.

The North Carolina situation was discussed; similar help was requested, with a lockout expected. Delegates and Counsel discussed the particular situation in the North Carolina negotiations, which includes a management proposal that if musicians go to the press with information, they can be fired. It was felt that we should take some action in this matter, through the Federation and then the AFL-CIO.

A motion was carried to refer the North Carolina negotiating situation to the Executive Committee for action (Motion #7, Howard/Lehr).

The Condition of Printed Music had been addressed in a paper from Gordon Peters presented at last year's Conference. Peters had asked ICSOM to examine this matter, and to draw the situation to the attention of other groups including publishers, managers and ASOL. This has been done; our role in this endeavor has now been fulfilled.

AFM Strike Fund membership was the subject of a motion at last year's Conference, wherein the delegates from Philadelphia and Boston were asked to return to their orchestras; deal with this issue, and report back to the Conference this year. Philadelphia and Boston are not members of the AFM Strike Fund. Neither of last year's delegates from these orchestras was in attendance as the delegate at this year's Conference, but material was presented by the current delegates. Boston Symphony musicians had met and voted again this year not to join the Strike Fund. Philadelphia musicians did not wish to meet again about the subject; they had previously voted not to join the Strike Fund.

General discussion was held about AFM Strike Fund membership. Delegates examined whether Strike Fund membership should be a condition of ICSOM membership. Orchestras who are in a marginal situation expressed concern; some would like to join but do not yet meet the minimum eligibility requirements. Others find that a small number of musicians object to joining the Strike Fund and thereby prevent the orchestra from passing a vote to apply for membership. Strike Fund Trustee Melanie Burrell and Chairman Zenone provided current information and historical background regarding Strike Fund membership guidelines. Lengthy discussions of the subject had occurred at the 1979 ICSOM Conference in Minneapolis.

Counsel Philip Sipser reminded us that membership in ICSOM does not mean automatic membership in the AFM Strike Fund. The AFM Strike Fund is administered by five trustees; two of these trustees represent ICSOM. The Federation originally provided \$250,000 to back the Fund. Strike Fund membership, once established by an orchestra, remains mandatory, and dues must be paid. In cases where individuals refuse to pay dues, results depend upon whether the orchestra is or is not in a right-to-work state. In non-right-to-work states, such musicians can be tried and expelled from the local and the Federation, and can lose their jobs. In right-to-work states, they can be expelled from the union, but not from their jobs.

#### Musicians Against Nuclear Arms (MANA)

Activities on behalf of MANA include symphony concerts to draw attention to musician opposition to nuclear armament. The ICSOM Executive Committee feels that participation in such activities should be determined on an individual basis; this Conference should not tell orchestras that this is something they ought to do. Participation can be addressed by individual orchestras or, as has been done in some orchestras, by the individual musician's decision. A number of ICSOM orchestras have already done or plan to do such concerts.

A motion carried that participation in activities against nuclear arms should be at the option of individual member orchestras (Motion #8, Darling/Wadenpfehl).

#### Lawsuit Concerning Work Dues

A taped report on a lawsuit concerning work dues has been made available by Sam Denov; the suit was brought by two musicians in a member orchestra. The suit represents these individuals' actions, and is not an official position of the member orchestra or of ICSOM. The tape is to be available to any delegates who would like to hear it.



### Opera-Ballet Caucus

Seven ICSOM opera and ballet member orchestras have met, and have determined that they would like a place on the Executive Committee comparable to an area vice-chair position. They would like this representation because of the uniqueness of their workplace, their minority position, and the commonality of the members of their group. Opera and ballet delegates spoke on behalf of this request, and much discussion ensued. Issues examined included the fact that opera and ballet orchestras are not necessarily represented by any particular region, and that opera and ballet orchestras have special problems and needs. Historically, it was noted that these orchestras have always been represented on the ICSOM Media Committee. It was felt that the main issues are communication and improvement of the situation of opera and ballet musicians. Concerns were also expressed about symphony orchestras who do opera and ballet work, and therefore would also have a vested interest in this type of representation. The possibility of a by-law change was discussed. It was agreed that a caucus of the seven ICSOM opera and ballet member orchestras could be of benefit.

A motion was passed which recommends to the ICSOM Chairman that a committee of the seven opera and ballet orchestras be organized, and that this committee select a chairman who would be invited, at the discretion of the ICSOM Chairman, to attend ICSOM Executive Committee meetings to represent opera and ballet views. ICSOM would pay for the expenses of such participation. A report should be made at the next Conference as to how this is being handled (Motion #9, Lawlis/Fader).

Chairman Zenone asked that the opera and ballet group meet and designate a representative to meet with the Executive Committee at the close of the full Conference.

### Election of Officers

The position of ICSOM Treasurer, vacated by John Planchian's resignation, was filled, with delegates electing by acclamation acting Treasurer Melanie Burrell.

Area Vice-chair recommendations were presented by the respective regions involved. All offices were filled by acclamation of the entire Conference as follows:

Southern area:	Bernice Beckerman
Western area:	Michael Nutt
Central area:	Catherine Compton
Eastern area:	Donald Whyte.

Vice-chairman Buckley presented a tribute to outgoing vice-chairs Pat Brannon (Southern) and David Angus (Eastern), acknowledging the work that they have done for all of us. Delegates applauded the two retiring vice-chairs.

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Retainer of Counsel and Fee

Counsel's fee is \$18,000 per year, including expenses; no change has been requested.

A motion carried to retain Counsel at the same fee for the coming year (Motion #10, Muggeridge/Fader).

Site and Dates for 1984 Conference

Dates for the 1984 Conference were discussed, with consideration given to availability of delegates with varying orchestra schedules and foreign tour conflicts. It was decided to hold the 1984 Conference during the week of August 27th, although the matter will still be left open for Executive Committee action in case of unforeseen problems.

Offers to host the Conference were presented by both Atlanta and Louisville. Delegates voted by a narrow margin to meet in Louisville.

Good and Welfare

Thanks were extended to our Baltimore host, Charles Underwood, whose efforts made this the best possible Conference. Delegates gave Underwood a rousing ovation.

Gary Smith spoke in appreciation of the efforts of the St. Louis local union and its President, Dick Renna, who was in attendance throughout our Conference. The special cooperation of the St. Louis Local was noted; Renna encouraged all delegates to invite their local union presidents to our meeting. Brad Buckley added that the St. Louis situation reflects a very special relationship between the union, the orchestra, and ICSOM; the local union president has been attending the ICSOM Conference each year since 1973. Buckley commended the union for its interest in attending, listening, and being influenced.

In closing the Conference, Chairman Zenone stated on behalf of the Executive Committee that it was wonderful to be here, and a joy to see the intelligence and energy which delegates have brought to this Conference.

He directed the secretary to see that Edith Zazofsky receives a copy of the remarks which were made in tribute to George Zazofsky, and that she be kept informed about the Congress of Strings Scholarship.

The 1983 ICSOM Conference was adjourned in memory of George Zazofsky.



Nancy Page Griffin  
Secretary  
November 25, 1983

# *International Conference of Symphony & Opera Musicians (ICSOM)*

Affiliated with the American Federation of Musicians - AFL-CIO

## MOTIONS AND RESOLUTIONS

1983 ICSOM CONFERENCE

Baltimore, Maryland

The following motions and ammendments were approved:

1. To approve the minutes of the 1982 Conference (Fader/Whyte).
2. To recommend to the AFM that Henry Shaw be the new AFM Strike Fund musician trustee, and that alternate trustees be Brad Buckley and Sam Denov (Whyte/Howard).
3. To accept all officers' reports (Luker/Shaw).
4. To accept the San Francisco Opera Orchestra into ICSOM membership (Whyte/Howard).
5. To direct the Chairman to appoint a committee to look into the matter of retired members' affiliation with ICSOM (Moore/Beckerman).
6. To provide a \$500 per year Congress of Strings scholarship in memory of George Zazofsky (Newa/Muggeridge).  
Ammended: To designate that it be called the "George Zazofsky ICSOM Scholarship" (Bocaner/Ross).
7. To refer the North Carolina Symphony negotiating situation to the Executive Committee for action (Howard/Lehr).
8. That participation in activities against nuclear arms should be at the option of individual member orchestras (Darling/Wadenpfuhl).
9. To recommend to the Chairman that a committee of the seven opera and ballet orchestras be organized, and that this committee select a chairman who would be invited, at the discretion of the ICSOM Chairman, to attend ICSOM Executive Committee meetings to represent opera and ballet views; ICSOM to pay for the expenses of such participation. A report to be made at the next Conference as to how this is being handled (Lawlis/Fader).
10. To retain Counsel at the same fee (\$18,000 per year, including expenses) for the coming year (Muggeridge/Fader).



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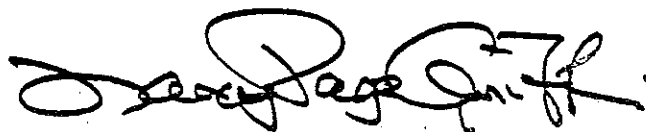
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