

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

Affiliated with the American Federation of Musicians - AFL-CIO

## OFFICIAL MINUTES

August 27-31, 1984  
Louisville, Kentucky

### MONDAY AFTERNOON, AUGUST 27, 1984

The conference was called to order and delegates were welcomed by Chairman Frederick Zenone.

Zenone introduced Mr. Bill Wilson, Mayor pro tem. of Louisville, who in turn welcomed conference participants to Louisville. Wilson read a proclamation which included greetings, together with appreciation of our contribution as professional musicians. He proclaimed the week of August 27th to be ICSOM Week in Louisville. Zenone expressed thanks on behalf of both ICSOM and the Louisville Orchestra.

### Roll Call

Secretary Nancy Griffin called the roll of the 47 member orchestras. Delegates were present to represent the following orchestras:

Alabama Symphony	Jim Ramey
Atlanta Symphony	Michael Moore
Baltimore Symphony	Charles Underwood
Chicago Lyric Opera Orchestra	June DeForest
Chicago Symphony	Raymond Niwa
Cincinnati Symphony	Henry Shaw
Cleveland Orchestra	Ralph Curry
Dallas Symphony	Doug Howard
Denver Symphony	Melanie Burrell
Detroit Symphony	Catherine Compton
Florida Symphony	Anne Bartlett
Grant Park Symphony	Eva Carol Beck
Honolulu Symphony	Mark Schubert
Houston Symphony	Don G. Slocumb
Indianapolis Symphony	Jerry Montgomery
Los Angeles Philharmonic	Don Muggeridge
Louisville Orchestra	Pat Brannon
Metropolitan Opera Orchestra	Marvin Topolsky
Milwaukee Symphony	Rip Prétat
Minnesota Orchestra	Paul Murphy
National Symphony	Larry Bocaner
New Jersey Symphony	Lucinda-Lewis
New Orleans Philharmonic Symphony	John Hall

New York City Ballet Orchestra	Joseph Schor
New York City Opera Orchestra	John Donohue
North Carolina Symphony	Craig Brown
Oakland Symphony	Stuart Gronningen
Oklahoma Symphony	Mark Mordue
Oregon Symphony	Judith K. Litt
Philadelphia Orchestra	Marcel Farago
Phoenix Symphony	Lenore Lehr
Pittsburgh Symphony	Penny Anderson
Rochester Philharmonic	David Angus
Saint Louis Symphony	Gary Smith
San Antonio Symphony	Ellen McGlone
San Diego Symphony	Karla Holland-Moritz
San Francisco Opera Orchestra	Peggy Lucchesi
San Francisco Symphony	Marguerite Figeroid
Seattle Symphony	Marilyn Garner
Syracuse Symphony	Richard Decker
Toledo Symphony	Carla Kusel
Utah Symphony	Lisa Allyn

ICSOM Orchestras absent because of foreign tours, but represented by proxy were:

Boston Symphony	Proxy to Philadelphia Orchestra
New York Philharmonic	Proxy to National Symphony

ICSOM Orchestras not represented at the conference were:

Buffalo Philharmonic  
Kennedy Center Orchestra  
San Francisco Ballet Orchestra

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

Saint Paul Chamber Orchestra	Carole Mason Smith
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### Introductions

Chairman Zenone introduced and welcomed guests, including:

Victor Fuentealba, President, AFM  
Eugene Frey, President, Cincinnati AFM Local #1, who  
also represented the IEB at these meetings  
Herb Hale, President, Louisville AFM Local # 11-637  
Dick Renna, President, Saint Louis AFM Local #2-197.

Additional guests and speakers who appeared and were welcomed during the course of the meetings were:

Lew Waldeck, Assistant to the President, AFM Symphony  
Department  
Lynn M. Johnson, AFM Symphony Department  
John Palanchian, Vice-president, New York AFM Local #802  
Stephen Klein, Executive Director, Denver Symphony  
Judy Mazo, Pension Consultant, Martin Segal Co.  
Abe Torchinsky, Administrator, ICSOM Emeritus Program.

Also introduced were ICSOM officers: Frederick Zenone, chairman; Brad Buckley, vice-chairman; Nancy Griffin, secretary; Melanie Burrell, treasurer; and Tom Hall, Senza Sordino editor.

Our hosts for this week were members of the Louisville Orchestra, under the leadership of host city conference coordinator Pat Brannon (the Louisville Orchestra's voting delegate for this conference). Chairman Zenone introduced and thanked Brannon, together with her conference assistant, Patricia Story (Louisville Orchestra Committee Chairperson).

Zenone called the attention of delegates to the agenda and schedule materials which had been distributed to delegates.

Victor Fuentealba, President, AFM: Opening Remarks

President Fuentealba extended greetings to the conference, and gave a brief update of the status of the Federation since our last conference. The new work dues structure has brought about fiscal stability for the Federation. Three new administrative assistants have been added to the Federation staff, and regional meetings are now being conducted throughout the Federation.

The Symphony Department's growth has been particularly important, with this department being the most effective Symphony Department in the history of the Federation. Fuentealba commended Lew Waldeck for a superb job. There have been many requests for Waldeck's assistance throughout the country, and the effect of this assistance has been most favorable. Lynn Johnson has recently been added to the Symphony Department staff, and will join us at this conference. The first conference of the Regional Orchestra Players Association (ROPA) will occur next month; this conference has been organized by Waldeck, and ICSOM Chairman Zenone will participate.

The executive committee of FIM (Fédération Internationale des Musiciens) met in Paris several months ago, and discussed an exchange of information similar to our symphony wage chart. Fuentealba convinced the FIM executive committee that this exchange would be worthwhile, and it will be carried out with Waldeck coordinating the information. FIM represents 35 countries, so that such an endeavor will mean a worldwide exchange of information between symphony orchestras.

Legislative changes over the years were outlined by Fuentealba, who reminded us that we are the largest entertainment union in the world, with over 250,000 members in the U.S. and Canada. In the early days, we were the most effective closed shop in the labor movement. However, over the years changes have occurred, particularly because of the Taft-Hartley Law and various NLRB decisions. Today the entire country is "right to work" in many ways. Fuentealba said that he doesn't believe the proponents of Taft-Hartley envisioned these results. The only effective means of dealing with this situation is to try for changes in the Taft-Hartley Law. This may be difficult, but is the only way to bring about improvements. Subcommittee hearings on this legislation are now scheduled in both the Senate and the House for September. Ned Guthrie, the AFM's National Legislative Director, has been effective in bringing this about. The support of all musicians is needed for enactment of this pending legislation. Senate Bill S 281 is scheduled for hearings on September 13th, and House of Representatives Bill HR 5107 will have hearings on September 18th. Together, these bills comprise the Performing Arts Labor Relations Amendments to the Taft-Hartley Act.

Relations between ICSOM and the IEB and Federation are excellent. Fuentealba maintains close communication with ICSOM in all matters which affect us; Waldeck is a big help in this regard. The new Audio-visual Agreement involved superb work by the ICSOM Media Committee.

Fuentealba closed by stating that it is appropriate for us to meet in Louisville this week, where contract negotiations are at a critical stage for Louisville Orchestra musicians. Although an agreement may not be imminent in these negotiations, the presence of the ICSOM Conference will provide a boost to morale, and should help progress toward an agreement. Fuentealba regretted that he had to leave our conference after today's session, but said that Eugene Frey will remain with us to represent the Federation throughout the week.

#### Announcements

Louisville host city conference coordinator Pat Brannon provided details about Louisville information which was being distributed to delegates. Brannon called our attention to the paddle wheel steamer ride scheduled for Wednesday night on the Belle of Louisville, and reminded us of the tour of the Kentucky Center for the Arts which will occur Tuesday evening.

1984-5

### Update of ICSOM Delegate Manual

Tom Hall and Nancy Griffin provided information about new materials which were to be inserted in the blue Delegate Manual.

### Minutes of the 1983 Conference

A motion was passed to approve the minutes of the 1983 ICSOM conference (Motion #1, Garner/Howard).

### Chairman's Report

Chairman Frederick Zenone spoke about his sense of the health and the malaise which exist, both in our industry and within ICSOM. He referred to three major trends, all of which are a result of our collective remarkable success.

A few years back, a hierarchy of orchestras existed which was based upon contract success. However, categories such as "the big five" have now become fuzzy as more orchestras reach or come close to parity with the top category. At the same time that these gains occur, we sometimes find a decline in sharing of information with other orchestras. It is important to remember the absolute necessity of dialogue with other orchestras, especially at times of negotiations. Managers have meetings three times a year, and are in daily contact with each other during negotiations. We must maintain our contact and share information with each other. Meetings between committees would be helpful. Also, meetings can be arranged while we are on tours. We must find a way to address this issue.

Zenone referred to a second area of concern relating to how we are seen by others. While we are increasingly seen as successful in public eyes, we may also be perceived as elitist in the eyes of the public and other arts organizations. Despite the injustice of this view, other organizations may feel that we are taking money from them; they no longer see us as "starving artists". Fund-raising for orchestras and support for musicians can therefore be adversely affected. This is especially troublesome given the current trend toward a "service" economy, combined with increasing hostility toward unions. In addition, orchestras themselves are more often in economic trouble. This is 1984, and what we did in the 1970's doesn't apply in the same way now. Our concerns must be more for what goes on in board rooms, although we may still have to fight in the streets and on the picket line. Zenone reminded us that we must maintain our concern for helping those orchestras who are still struggling to make economic gains. It is in our common interest to help those orchestras who are still seen as "have nots". If we fail to do

this, the results will come back to haunt us. A large body of musicians, highly qualified but underpaid, coupled with denied possibilities for upward mobility, will not enhance the prospects for job security, tenure and increased wages in our largest orchestras.

The health of our organization constitutes a third area of concern. Our scope has widened greatly to include much contact outside of our own organization. We now have an expanded relationship with the AFM, including increased media involvement, and a newly expanded Symphony Department. The Symphony Department needs to receive our help, as well as to serve as a resource for us. The new Regional Orchestra Players Organization flatters us by looking to us for a structure to imitate. The Congress of Strings now has increased ICSOM involvement, including two board positions, fund-raising responsibilities, and program responsibilities. Our relationship with the Major Orchestra Managers Conference has expanded. ICSOM's involvement with the NEA continues, and we have increasing dialogue with foreign orchestras.

In addition to these many outside activities, ICSOM's work with member orchestras has greatly increased. The chairman has participated in seminars with individual orchestras, and has worked with other orchestras in many ways. Upwards of 30 days a year are spent on the road by the chairman, meeting all of these obligations. This teaching activity has led local orchestras and committees to become more involved and more activist, but this in turn leads to a burden on local committee leaders. Zenone expressed concern that these overburdened local leaders may become less available to participate as ICSOM delegates, since their very service to their orchestras may cause them to "burn out", and therefore to become less available to ICSOM.

ICSOM's structure, which was once comfortable, is now approaching gridlock. The chairman is too busy, the vice-chairman has little jurisdiction, and the area vice-chairpersons have little possibility of being self-starting within their existing job descriptions.

Chairman Zenone therefore recommended a restructuring of ICSOM's leadership roles. He proposed that the office of chairman be divided, with responsibilities to be shared with a newly created office of president. The chairman would be the chief executive officer, and would be responsible for relationships with outside agencies. The president would be the chief operating officer, and would be concerned with constituent orchestras. The office of vice-chairman would be deleted under this new structure.

Additionally, a President's Council would be appointed, to consist of at least five committee chairpersons or active committee people selected from a broad spectrum of orchestras. This council would advise the president, and make it more possible to serve our orchestras and get information to them.

Further changes in structure would involve discontinuing the four area vice-chair offices; instead, four members at large would be elected. The five officers (chairman, president, secretary, treasurer, and editor) plus the four members at large would constitute the governing board of ICSOM. Between meetings, the business of the organization would be carried on by the five officers, who would constitute the executive committee. Zenone also proposed that there be a nominating committee, which ICSOM has so far never had. This nominating committee would present to delegates suggestions for those to be elected to the governing board; additional nominations from the floor could occur as in the past.

By-law changes to bring about these revisions in structure would not need to be extensive. Written copies of the proposed changes will be made and will be available to delegates at tomorrow's session.

Chairman Zenone closed by reminding us that our problems are all a result of our successes. He indicated that it had been a special privilege to work with this year's ICSOM officers.

#### Officers' Reports

Written reports by other officers appear in the Delegate Manual. Delegates were reminded to read these reports.

#### Vice-chairman's Report

Vice-chairman Brad Buckley indicated that he does not plan to run again for an ICSOM office. He recalled his first ICSOM conference in 1974, and observed how we have all grown and expanded our perceptions in the years since then. He paid special tribute to Philip Sipser's influence, and noted how Sipser has always encouraged us to be supportive of our local unions. In turn, our local unions have increased in their appreciation of ICSOM. Buckley described his years of involvement with ICSOM as the ten most important years of his life, and said that he leaves his duties as an officer of ICSOM with many memories of the pleasure and the honor it has been to serve in this capacity.

An ovation by delegates followed Buckley's remarks.

Chairman Zenone responded that we won't let Buckley get away; we will continue to regard him as a capable and efficient resource for ICSOM.

### Secretary's Report

Secretary Nancy Griffin added to her written report by thanking delegates for their cooperation throughout the year. She expressed appreciation for the chance to get to know and work with many delegates, especially in the process of preparing contract settlement bulletins. Delegates were reminded to contact the secretary immediately when there is news to be shared with other orchestras.

### Treasurer's Report

Treasurer Melanie Burrell provided an explanation of certain details in her written reports for the ICSOM treasury and the Emergency Relief Fund. The ERF is currently smaller because not all outstanding loans have been repaid yet. This reduces the amount available for ERF loans to orchestras.

### Senza Sordino Editor's Report

Editor Tom Hall stressed that he needs information, feedback, and positive input. He asked delegates to fill out the delegate survey. Hall urged us to send in material for Senza Sordino such as newspaper articles of general interest (not reviews).

Orchestras who are currently (or recently have been) in negotiations were asked to meet later with Hall and Griffin for a briefing on submission of reports for both the ICSOM Bulletin and Senza Sordino.

### Counsel's Report

Leonard Leibowitz urged delegates to view counsel's written report as more than a summary. It should also be seen as an educational tool, as it concerns problems which come up throughout the year and are/will be common to all of us. Those of us who telephone counsel with problems should also provide feedback afterwards about what happened. Arbitration awards should be forwarded to counsel's office as always. A large file of arbitration awards exists concerning previous decisions.



### Discussion

At Chairman Zenone's suggestion, there was a general discussion of various topics mentioned in the Chairman's Report, other than reorganization.

Zenone stressed that while we must continue to fight for survival, we must never lose sight of excellence, dedication, and involvement in our institutions.

Discussion by delegates included issues of communication, our self-image and our public image, liaison with boards of directors, changes in types of management, support of other arts institutions, and geographic overlap of areas served by some of our orchestras.

Vice-chairman Buckley reminded us that answers which were derived in the late 1960's and 1970's may no longer apply. We must beware of becoming so caught up in past ICSOM accomplishments that we fail to see the ICSOM of the future.

### AFM Strike Fund Trustees' Report

Melanie Burrell, representing the AFM Strike Fund Trustees, noted that information in the Delegate Manual is not yet complete, as the Strike Fund balance sheet still has to arrive from New York.

Strike Fund Trustees met in May and established new eligibility requirements for member orchestras. As before, the size is set at 60 members, but the annual salary requirement has been raised to \$15,000. A new sheet in the Delegate Manual deals with Strike Fund dues collection, and describes how to obtain benefits in the event of a strike or lockout. Burrell urged delegates to collect dues and remit all at once with one check, as described in the Manual.

AFM President Fuentealba reminded us that the AFM Strike Fund is the most valuable tool created so far for orchestra musicians. We must never fail to overlook the importance of this fund.

Counsel Sipser stressed that everyone benefits from the AFM Strike Fund, since each orchestra is a recipient of the largesse of those who created the fund. The AFM provided \$250,000 in order to make the fund a reality. The valuable insurance provided by the Strike Fund is comparable to instrument insurance or fire insurance. All of us benefit, whether or not we are members. He also reminded us that this is an AFM Strike Fund, not an ICSOM fund; there are three trustees from the Federation and two from ICSOM (Burrell and Henry Shaw).

Questions raised by delegates included possible mandatory Strike Fund membership, lower salary eligibility requirements, dual-level salary requirements, and dues payments for full-time substitute musicians. There was lengthy discussion of these and other Strike Fund issues.

We were reminded again that the AFM Strike Fund was created by the AFM, and is a part of AFM by-laws. The only change which can be made by the trustees is to increase financial eligibility requirements. Any other changes would have to be made at the AFM convention. AFM President Fuentealba stressed that much work and study had gone into the concept of the Strike Fund before it was initially adopted by the AFM convention. He suggested that we refer these questions to a committee for additional study.

Delegates decided to put all of these questions into the hands of an ICSOM subcommittee for investigation.

A motion was passed to refer questions about AFM Strike Fund membership to a special committee, which would study the matter and report back to the conference (Motion #2, Howard/Decker).

A further motion was passed stating that the Chairman should appoint the subcommittee to study the issue of AFM Strike Fund membership, and that the entire matter should subsequently be referred to the ICSOM executive committee for recommendation to the IEB of the Federation (Motion #3, Howard/Bartlett).

Delegates who were later appointed to this Strike Fund Committee were Henry Shaw (Chairman), Melanie Burrell, Doug Howard, Ellen McGlone, and Jim Ramey, together with Lew Waldeck from the Federation.

#### Mendelson Fund

Chairman Zenone presented a report on behalf of Mendelson Fund Chairman Irving Segall. The Mendelson Fund is a memorial to the late Ralph Mendelson, a former chairman of ICSOM and a member of the New York Philharmonic. The fund provides an award each year for a paper on labor relations. Although there was no award given last year because of difficulties in timing and coordination of announcements, this year a prize has been awarded. An award of \$500 will go to Lauren Lavine, a graduate student in arts administration at Columbia University, for her paper entitled "A Force for Democracy within the Orchestral Setting: The International Conference of Symphony and Opera Musicians - ICSOM". Although this paper was the only entry, it was judged to be excellent.

Since there still are difficulties concerning visibility and coordination of the competition, Mendelson Fund chairman Segall recommends that he be given time to study the situation, and if necessary find another administrator. If there are not good solutions to the problem within this framework, Segall suggests that the ICSOM executive committee be empowered to put the Mendelson Fund assets to another use in the name of Ralph Mendelson.

A motion was passed to support the recommendation of Mendelson Fund chairman Irving Segall that he study the problems concerning the competition for the Mendelson fund award, and if it is necessary, that the ICSOM executive committee be empowered to put the Mendelson Fund assets to another use in the name of Ralph Mendelson (Motion #4, Niwa/Moore).

TUESDAY, AUGUST 28, 1984

Chairman Frederick Zenone called the conference to order, and Secretary Nancy Griffin called the roll of member orchestras.

A motion was passed to accept all officers' reports (Motion #5, Shaw/Angus).

Delegates were urged to present their concerns about the AFM Strike Fund in writing to the Strike Fund Committee not later than today.

Membership Committee: Application for Membership

Vice-chairman Brad Buckley presented two items of business on behalf of the Membership Committee.

The first matter was a membership application from the Saint Paul Chamber Orchestra. Carole Mason Smith, the representative from this orchestra, had already met (as required by ICSOM By-laws) with the Membership Committee (Buckley, Griffin, and Central Area Vice-chairperson Catherine Compton).

The Membership Committee recommended acceptance of the Saint Paul Chamber Orchestra's application. The application was discussed, and membership policies were clarified for new delegates.

A motion was passed to accept the Saint Paul Chamber Orchestra into membership in ICSOM (Motion #6, Niwa/Bocaner).

Smith, who had been excused during the discussion, was asked to return to the room. She was congratulated and the Saint Paul Chamber Orchestra was welcomed as a new ICSOM member orchestra.

### ICSOM Membership Requirements

The second matter presented by Buckley was an executive committee recommendation that ICSOM membership requirements be raised to \$15,000 annual salary per player for any future orchestra membership applications. The minimum number of players would stay at 60. All incumbent ICSOM member orchestras would, of course, remain as members; the new salary level would pertain only to new membership applications.

Lew Waldeck assured us that ROPA, the new Regional Orchestra Players Association, will be a resource for orchestras which do not qualify for ICSOM membership. Therefore, no one will be left out. ICSOM Secretary Griffin always responds to membership inquiries and refers them to Waldeck, in the event that the inquiring orchestra is not qualified for ICSOM membership.

A motion was passed to raise ICSOM membership requirements to \$15,000 annual gross income per player for non-member orchestras applying for membership (Motion #7, Hall/Howard).

### Auditions Committee Report: Resume Tapes

Vice-chairman Buckley reviewed the history of traditional audition problems, including the large number of applicants and the small number of positions, resulting in an enormous burden on committees, and economic hardship for applicants. The ICSOM Auditions Committee has discussed the idea of resume tapes, in order to partially alleviate these problems. The purpose of such resume tapes is to establish credentials, in addition to written applications. Resume tapes would be used only to screen levels of competence and are merely a tool which can be used at the discretion of each orchestra. They are not to be considered "taped auditions"; they would be followed by the regular audition procedure.

Repertoire lists have been established, and are available through the Federation. These lists will be changed every two years, so that resume tapes will be current. On the basis of much investigation by the ICSOM Auditions Committee, it was suggested that sound standards and equipment for making tapes be left up to individual applicants. Orchestras who have already used taped resumes have discovered that actual tape quality is not crucial, and that there is little difficulty in identifying competent applicants.

We must remember that historically those who have been the most harmed by the traditional audition process are musicians in smaller orchestras who would like to move to bigger orchestras. Such musicians often find it difficult to get leave, and are faced with heavy odds against them because of many applicants for

each opening. By contrast, students are relatively free to travel, and members of larger orchestras find it easier to get leave for auditions.

The issue of resume tapes has resulted in a tripartite agreement for our consideration by the ICSOM Auditions Committee, the Major Orchestra Managers Conference, and the AFM. However, the possible use of such tapes is presented only for our consideration, and any actual use of resume tapes would be determined by individual orchestras.

#### Auditions Committee Report: Auditions Code of Ethics

Chairman Zenone presented the Code of Ethical Practices for National and International Auditions, a document which has evolved over the past two years through joint efforts of ICSOM and the Major Orchestra Managers Conference. This is intended to be a document of persuasion, but is in no way a contract. The code deals only with ethical issues, and not with procedural and contractual issues; it is not intended to pre-empt anything which is locally bargainable. Vice-chairman Buckley stressed that fair auditions are the concern of the code.

The text of the code (see below) was read to delegates by Zenone, who told us that the Major Orchestra Managers Conference has already accepted it. If we, in turn, accept it at this conference, the code will then go to the AFM for its acceptance. The code represents our best effort at a first document. Ultimately its effectiveness will depend upon peer pressure, and each entity will need to be concerned with the ethical behavior of its own colleagues.

The executive committee presented a unanimous recommendation for acceptance of the Auditions Code of Ethics. Copies of the code were made available to delegates, and later in the afternoon session there was discussion of various concerns about the code. Also discussed were cases of apparent unethical auditions practices which have occurred in the past.

Following the discussion by delegates, a motion was passed that we adopt the Code of Ethical Practices for National and International Auditions, and that we encourage our orchestras to follow these practices (Motion #8, Angus/Holland-Moritz). Delegates were instructed to file copies of the code in their Delegate Manuals under the "Special Reports" section.

We will now go to the AFM and hope for their endorsement of the code.

CODE OF ETHICAL PRACTICES  
FOR NATIONAL AND INTERNATIONAL AUDITIONS

Purpose and Scope of Code

It is of utmost importance to musicians, managers and conductors that auditions be conducted in accordance with guidelines ensuring competition that is fair to all who audition while providing the best results for the orchestras seeking musicians.

Therefore, the American Federation of Musicians (AFM), the International Conference of Symphony and Opera Musicians (ICSOM) and the Major Orchestra Managers Conference (MOMC) propound the following ethical and fair audition practices to which all parties should adhere, subject to local contractual considerations.

I. Preparation for Auditions

1. Notices of auditions should be given only for genuine vacancies, including newly created positions, which the management intends to fill as a result of those auditions, with no predeterminations having been made as to who will be hired. Musicians taking such auditions should only do so with the intention of accepting the position if it is offered.

2. Auditions should be advertised in appropriate places, including the International Musician and the AFM Central Auditions Office. Notices should be clear and complete, specifying the position intended to be filled by the auditions, the person to contact in response to the notice, and the dates that applications are due and that auditions will be held. Notices should appear far enough in advance of auditions for interested musicians to apply and to prepare adequately.

3. All applicants should be sent written responses to their applications. Invited applicants should be sent clear instructions setting forth the date, time and place of the audition, the complete audition repertoire (excluding sight reading repertoire), and parts for announced excerpts not generally available. All parts supplied by the orchestra should be legible and identical for all candidates.

4. Applicants should be given notice that if they choose not to attend the audition they should promptly notify the personnel manager or other designated person.

## II. Conduct of Auditions

1. In preparing for and conducting auditions, all participants should be aware of policies and procedures governing those auditions, including this code.

2. Although the existence and composition of an audition committee and the nature and extent of its participation in auditioning and hiring is governed by the Local Trade Agreement, musicians' involvement should at least include the initial screening of applicants.

3. Applicants should not be disqualified from auditioning on the basis of information about them obtained from current or previous employers or from other institutions to which they have applied.

4. Auditionees should be given sufficient time and, to the extent possible, adequate private facilities in which to warm up and practice.

5. Parts supplied by the orchestra for audition should be in good condition, legible and clearly marked as intended to be played at the audition.

6. There should be no discrimination on the basis of race, sex, creed, age, national origin, religion or sexual preference.

7. There should be reasonable accommodation for the handicapped.

8. Auditionees should be given opportunity and encouragement to comment, anonymously if desired, to the audition committee and management about the audition process.

9. Auditionees should be notified of their status in the audition process immediately upon such determination. Candidates under active consideration after auditions are completed should be so notified and given an estimated time of final decision.

10. Auditionees should be informed prior to auditions of the orchestra's policy regarding reimbursement of auditionees' expenses for additional stay or travel incurred at the request of management.

### Administration and Review of Code

A joint committee of representatives of the Major Orchestra Managers Conference, ICSOM and the AFM Symphony Department shall be established to oversee and review this code periodically.

Foreign Orchestras

Michael Nutt and Chairman Zenone presented an update of information about our relationships with foreign orchestras. Zenone stressed that our outreach to continental and British orchestras, and theirs to us, has been strictly on a colleague-to-colleague basis. It is important to have these contacts between musicians, but we must be aware that this is in no sense a union-to-union affair, and we are making no attempt to expand ICSOM activities to include foreign orchestras. Instead, we have begun an exchange of information, including such materials as Senza Sordino and media information. In addition, personal contacts continue through Zenone, and Nutt continues to keep in touch with orchestra committee chairmen in Britain. Continental orchestras who have been in contact this year with Zenone are the Concertgebouw Orchestra of Amsterdam, Vienna Philharmonic, French National Orchestra, and Orchestre de Paris. The Paris Opera Orchestra has also expressed interest.

Eugene Frey, IEB representative, had attended the FIM meeting in Budapest and spoke to ICSOM delegates about the worldwide similarity of problems. He had talked with various delegates at the FIM meetings and was able to describe for us some of the differences in union and organizational functions in Italy (where there are three different musicians unions), France, Hungary, Holland, Czechoslovakia, Germany, Japan, Greece, and Scandinavia. Frey said that chief concerns in other countries include taped music, satellites, and tours.

Zenone observed that although we share a number of common problems with our colleagues in other countries, many circumstances are not translatable. All we can do is maintain contact and discuss our workplace in colleague-to-colleague terms.

Amalgamation of Medical Benefits

Amalgamation of medical benefits refers to the possibility that our organizations might buy medical benefits at wholesale prices. Chairman Zenone explained that such an approach would not be intended to interfere with locally bargainable matters. ICSOM's concern with amalgamation of medical benefits began years ago, although at the outset the managers were not interested. Two years ago, Charles Underwood was appointed to chair an ICSOM investigation of this subject. He did an excellent job, and subsequently managers began to take notice of the possibility of this sort of amalgamation. Eventually the finance directors of our orchestras commissioned a study by Mercer and Company; the results of this study will soon be available.



The next step is for the managers, together with ICSOM, to move ahead with the investigation of this subject.

A September meeting concerning medical amalgamation will take place in New York, and will include ICSOM Chairman Zenone, Underwood, Stephen Sell (Chairman of the Major Orchestra Managers Conference), and Mercer representative(s). This meeting will allow us to ask questions of the Mercer people.

If an amalgamated approach could be made to work, it would mean that we could buy more for the available money. By pooling our resources, we could combine our buying power, as well as our insurance "experience". We could possibly stop the erosion of benefits and make money available to the rest of the bargained contract package. Concepts of amalgamation could be extended into the entire insurance program, including life, disability, and instrument insurance, as well as medical insurance.

#### Electronic Media Committee Report: Recording Agreement

Vice-chairman Brad Buckley reported that the Recording Agreement has now been ratified by recording orchestras. He summarized the five new basic provisions: (1) Tuning may take place outside the hour, i.e. before the session begins. This first tuning occurs on musicians' time; thereafter tuning is on company time. (2) Within the session, a five-minute grace period is permitted (beyond 60 minutes) on a "take", to allow for musical contingencies. (3) In the event that technical problems cause a delay, a maximum of 15 extra minutes will be allowed at straight time, without overtime payments. This time may not be used to make new product. (4) Location recording provisions have been included, to allow for balancing of microphones. (5) For premiere recordings (as defined in the Recording Agreement), allowance is made for additional balancing, with approval of the Federation.

This new three-year contract was the result of low key negotiations, and was mostly a holding action. There is less and less recording of American orchestras, and it appears that recording companies intend to cut back even further in the

In the new contract, the symphonic rate was increased to keep up with the commercial rate. The industry continued its efforts to do away with the Special Payments Fund and to reduce MPTF. We were able to hold the Special Payments Fund, but MPTF will be reduced drastically (by about 40 per cent). The effects of this reduction will not be felt until next year.

Electronic Media Report: Audio-Visual (A-V) Agreement

The new A-V Agreement is the first national contract which covers only symphony, opera and ballet musicians, and is the first contract to be ratified only by these musicians. Zenone presented the report on this unique agreement, which provides for revenue sharing based on money made on a product; more use of the product results in more money paid to musicians. It also allows for movement from one medium to another (with additional payment). John Palanchian indicated that the Metropolitan Opera Orchestra has had good earnings already under this new agreement.

Negotiations for this contract were extended and often difficult. Our goals included trying to correct those things which appeared to be reasons why we had not gotten work (or which could cost us work in the future). Thus, we addressed the problem of producing product abroad, so that we can obtain additional revenue for live work on tours. We also attempted to open up new markets including video discs and short piece incidental music. A new formula has been created for clips and compilations; we feel that this is a good provision. Most other provisions are the same as in the old agreement. The new A-V Contract is only for national television, and contains nothing about local television.

We settled for wage increases of 6 per cent in each of the three years, but this is considered a big settlement, and remains economically ahead of the old Public Broadcast Agreement in every way. The old PB contract has expired only for those who are signators to the new A-V contract. Television producers will fight to do work under the old contract, but we will do everything possible to prevent work by our people under the former agreement. The only exception is for an orchestra's annual PBTv fund-raiser.

The memorandum of agreement on the new contract will go to orchestras for ratification as soon as it is in final form. It will be directed via the committee chairperson, but we must be aware that the ICSOM delegate may be the only one who will understand it. The burden is on the delegate to present and explain it in a way which will persuade the orchestra to ratify the contract.

Zenone stressed that this is the single most important contract development in this field in the last 50 years for symphony, opera and ballet musicians. Buckley added that opportunities now exist, under this agreement, for smaller organizations with smaller budgets to do television work. We were urged by Zenone to be certain that our orchestras vote, and that the information is sent to the Federation. This is a unique opportunity to ratify our own agreement, and we must see that it is done.

Later in the weeks' proceedings, Lew Waldeck called our attention to a typographical error which will appear in the A-V contract resume in the upcoming issue of the International Musician. The actual document is correct, as is the material which will be sent to orchestras. The error will be also be corrected in the subsequent issue of the International Musician. Waldeck provided copies of the resume so that we could insert the correction under item #6: the words "per hour" should be inserted following the figures \$80.00/\$84.00/\$89.89 at the end of the third line of #6. Waldeck will send a notice about this to each delegate and to each manager of those orchestras who are signators to the A-V contract.

### Medicine and Musicians

Chairman Zenone stated that medical problems indigenous to our profession have recently been the subject of an increased number of conferences. He felt that this interest on the part of the medical profession is a good sign. Melanie Burrell and Doug Howard have covered two of these conferences on behalf of ICSOM during the past year.

Burrell reported on this year's Denver conference, which addressed the "Biology of Music Making". At a similar conference held at Aspen last year, the issue of pain was the main topic. Last year was the first time we had heard the term "musicians' medicine", with the focus being especially on string players and pianists. As an aftermath of that conference, we were asked to participate in this year's conference, and we are now represented on the board. She reported that most of the participants this year were physicians, together with some music teachers, a few musicians, and two tour doctors. Presentations this time were more detailed and technical, with less interaction than at the previous conference.

A conference presented by the American String Teachers Association was held this year in Illinios. Burrell said that the content was similar to last year's Aspen conference; we did not send a representative.

Doctors are now becoming more aware of musicians' medical problems in a way which is similar to sports medicine, although it is still at an informational level, and is not such a big business. A musicians' medical clinic now exists in Boston, and clinics are also being established in Denver and in Cleveland. Studies in New York involve the Orthopaedic Center for the Arts and the New York Joint Disorder Hospital.

The increased interest in study and prevention includes physicians and also therapists. The latter group were represented at all of the conferences, and demonstrated various techniques of therapy. Despite this increasing interest, however, Burrell indicated that there is not yet a network of clinics and experts. There will undoubtedly be more conferences and more interaction in the future. She encouraged us to watch, participate, and to share any relevant information so that we can determine where our efforts can best be directed.

Howard reported that this year's Aspen conference included opera singers and wind instrument players. He was able to attend only the wind instrument meetings. He expressed disappointment that there was not more input by musicians; many specialists in this field apparently were not asked to participate. However, Philip Farkas, former principal horn with the Chicago Symphony, gave a very informative talk on his experiences with health problems, especially chronic asthma.

There are now places we can begin to seek help, including the Cleveland Clinic mentioned by Burrell. Howard also spoke of research being done by Dr. Steven Horvath, Director of the Institute of Environmental Stress at the University of California, Santa Barbara. Horvath has studied 75 horn players at an International Horn Society Conference. Tapes of certain sessions at the Aspen conference were made by Howard and they are available to be shared with delegates. Burrell has programs from all of the medical conferences; these are also available to delegates.

Chairman Zenone noted that many people in our orchestras have medical problems, but not all know whether their difficulties are occupation-oriented. He encouraged us to be sure that our colleagues know of developments and available resources in the field of musicians' medicine. We should contact Burrell and Howard for additional information.

Delegates discussed additional thoughts about medical matters, and special concern was expressed about sound levels and potential hearing loss. Information was shared about how this problem is experienced and handled in a number of our orchestras, and suggestions were made including baseline hearing tests, audiometer tests of hearing both before and after rehearsals, and measurement of actual decibel levels. Mechanical solutions such as earplugs, plexiglass shields, and baffles were also described.

Even a small hearing loss may be critical to a musician's career. Henry Shaw reminded us of the importance of sympathizing with our colleagues, especially in the area of potential hearing damage. Zenone observed that our communication with each other is often poor, and individual musicians may become offended as we seek

solutions to these problems. Tom Hall, Senza Sordino editor, said that he has a great deal of information about these matters in his files, and he will be glad to share this material.

It was agreed that we should compile and study information about sound levels and hearing loss. Karla Holland-Moritz will be in charge of this endeavor; Zenone asked for volunteers to assist in the collection of this information. Further discussion of the matter was postponed, but will be addressed again later under Lew Waldeck's AFM Symphony Department report.

In preparation for negotiation reports, scheduled for Thursday morning, those delegates who will be presenting reports were asked to prepare brief written summaries. These summaries will be duplicated and distributed to all delegates ahead of time.

#### ICSOM Reorganization

Chairman Zenone presented a review of the reorganization as proposed in the Chairman's Report on Monday afternoon. The new governing body would include an executive committee (consisting of chairman, president, secretary, treasurer, and editor), plus four members at large. In addition, a president's council would be created, and standing committee chairs would also be included in deliberations as needed. Thus, people who are active leaders in our orchestras could more readily be involved. A nominating committee would also be officially appointed by the governing body. The existing office of ICSOM vice-chairman, as well as the area vice-chair positions, would be deleted under the new plan.

Zenone stressed that communication would be enhanced under the potential reorganization. Under the proposed new system, the power and influence would be spread over a wider area. He encouraged caucuses during the conference on the basis of special issues rather than by geographical areas.

A lengthy discussion followed, in which delegates addressed many concerns about the proposed reorganization.

A motion was made and seconded to accept the reorganization of the structure of ICSOM as presented by the chairman on behalf of the executive committee (Motion #9, Bartlett/Smith).

An additional motion was made and seconded to vote on the above motion by secret ballot (Motion #10, Ramey/Niwa). The secret ballot motion failed to pass.

The motion to accept the reorganization was approved.

WEDNESDAY, AUGUST 29, 1984

Vice-chairman Brad Buckley called the conference to order. Secretary Nancy Griffin called the roll of member orchestras.

Buckley introduced ICSOM Counsel I. Philip Sipser, who expressed his pleasure at the discussion and dialogue by delegates. He stated that no other union group has such a distinct character as a rank and file organization, at both delegate and leadership levels. He identified ICSOM as unique in the history of trade unionism and indicated that we will have a special place in labor history.

Tribute to Brad Buckley was paid by Sipser, who expressed appreciation of Buckley and his remarkable contributions to ICSOM from the time he first knew him. Sipser also paid tribute to Henry Shaw as one of the courageous organizers of ICSOM. He greeted John Palanchian and noted his distinctive part in ICSOM's history. He also acknowledged IEB member Gene Frey, as well as Dick Renna, president of Saint Louis Local #2-197.

Pensions: A Working Primer

Counsel Philip Sipser stated that the purpose of this discussion would be to de-mystify the pension process. Negotiation committees are usually at home with wages, fringes, vacations, etc., but are often frightened of pension concepts. He stated that it is important to feel just as comfortable with pension proposals as with any other proposals. Even most lawyers are not familiar with pension matters.

Information was provided by Sipser about ERISA, the Employee Retirement Income Security Act of 1974. He spoke of the importance of joint administration of pension funds (union and management), as is the case in the majority of ICSOM orchestras.

Some ICSOM orchestras do not have their own pension plans. Sipser discussed how to approach getting such a plan and the advance preparations which are necessary.

Pension plans can involve either defined contributions or defined benefits; the latter is recommended by Sipser. Benefit guidelines were described.

Unfunded actuarial liability is like a mortgage which covers those who retire before the plan has been in effect during their entire service. Pension investments must be examined with concern for who decides where to invest pension funds. Advice should be obtained from a good actuary or pension consultant.

Documents involved include the trade agreement, the trust indenture (constitution and by-laws of the pension plan), and the pension plan itself. The latter is a lengthy formal document which sets forth all provisions of the plan. Under ERISA, trustees must send out annually a summary plan description. The actuarial valuation report describes the state of pension plan assets and its experience and tells how the plan is doing. Pension plans are clouded with verbiage to a point that they may seem to be in a foreign language. We must insist that the actuary or other advisor speak in English.

A key concept is the understanding of assumptions, which can be described as "guesstimates" of what the actuaries believe will happen in the next several years. Yield (or investment income) assumptions are based on how much the fund will earn in the next 10 to 20 years. We must remember that pension plans pay on the basis of assumptions, not actual yield. Age assumptions refer to the age at which musicians are expected to retire. Additional assumptions are turnover assumption, and death and disability assumption, although our concerns are mostly with yield and age. In all cases, our efforts should be directed toward getting benefits increased consistent with fiscal soundness and integrity.

ERISA says that actuaries (not trustees) make the assumptions, and we must be prepared to argue with the actuaries if necessary. We should keep track of the investment portfolio and be sure that income is as high as it should be. It is important to have a guarantee of steady income, above the yield assumption. In this situation, a fixed lower income is preferable to taking risks for possible higher income.

Vesting provisions refer to the period of time required before benefits are locked in; for musicians ten years is best. Joint and survivorship benefits can cut actual benefits because they are based on two lives.

We must remember that for every advance in pension there is a price. In the future, we should all strive for 50 per cent of salary as a pension benefit. Such a pension, together with Social Security, should make it possible to retire with dignity and to have a reasonable living standard.

Len Leibowitz reminded us that all changes in pension plans are purchasable or negotiable. He also pointed out that in addition

to the privately trustee plans described by Sipser, other options exist for smaller orchestras who want to start a pension plan. Insurance companies will sell pension plans. If no money exists to buy a plan, an amount of money can be negotiated to be set aside toward an eventual plan.

Many questions and answers followed the presentation. Extensive discussions concerned the implications of a "fully funded" plan, unfunded liability, breaks in musician's service, pension benefit concerts, investments, and many other concepts. The AFM/EPW Plan was discussed. Questions were asked about possible pooling of pension investments, and Chairman Zenone indicated that while we are still looking at the idea of such wholesale sharing, the political reality is far in the future. Sipser urged us to keep in mind the goal of increasing benefits to those who sacrificed to create our pensions.

#### New Directions in Supplemental and Alternative Pension Programs

Judy Mazo, Pension Consultant with Martin Segal Company, was introduced by Philip Sipser. He identified her as a Vice-president and Director of Research for Martin Segal Company, and as a lawyer and expert on ERISA legislation.

Mazo stated that her work involves keeping track of ERISA legislation and that she also deals with various types of supplemental savings programs. These programs, which are designed to supplement pensions, include tax sheltered programs in which savings are accumulated without tax on earnings until the money is received. An IRA (408A) can be obtained by the employee alone, while a 401K or 403B requires the cooperation of the employer. Numbers attached to these plans refer to sections of the IRS Code which authorize them.

Differences between 401K and 403B plans were described, and Mazo noted that Social Security tax is now charged on all of these plans. The 403B is a tax shelter which is generally an annuity or mutual fund, which allows more than \$2,000 per year to be put away but which has restrictions on when money can be removed. This type of plan is only for employees of charitable organizations, non-profit organizations, hospitals, orchestras, museums, school systems, etc.

The 401K is new and is a profit-sharing plan. Seventy per cent of major corporations now have this type of plan, whereby employees are allowed to make certain individual savings decisions. Special tax treatment is available under the 401K providing it is "non-discriminatory", meaning that it doesn't favor higher-paid employees over those who are lower-paid. Both employer and employee contribute.



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Under certain circumstances, non-profit organizations may participate in 401K plans.

Additional differences between the two plans include tax treatment of money withdrawn at the end. The 401K is eligible for "lump sum" treatment, and funds can be treated as if they had been received over a 10 year period. Ordinary tax applies to the 403B at the time money is taken out. Mazo explained a number of other differences and details about the two types of plans. Printed material was handed out so that delegates could see these differences more clearly.

Questions and answers provided further information for delegates. Sipser reminded us that such plans, which involve employee contributions, are never a substitute for a pension, but are rather a supplement to pension plans. Zenone cautioned us that the money available in the pension field is enormous, and we must be aware that everyone wants to get a hand on it.

#### Instrument Transportation on Airlines

We are increasingly seeing problems with transportation of our instruments on airlines, especially in the realm of carry-on baggage. Even on tours with chartered planes we are experiencing difficulties. Chairman Zenone said that we would like to establish a liaison between musicians and those who are at the other end of the problem, such as airlines, flight attendants, unions, etc. This might help us to achieve a more manageable position.

A motion was passed stating that we should establish a committee to study instrument transportation on airlines (Motion #11, Decker/Hall). Zenone asked those interested in serving on the committee to contact him. Lew Waldeck has contact with flight attendants, and will check with them about the situation.

THURSDAY, AUGUST 30, 1984

Chairman Frederick Zenone called the conference to order. The roll of member orchestras was called by Secretary Nancy Griffin.

Appreciation and thanks were expressed to Pat Brannon and her committee from the Louisville Orchestra for the excellent and efficient job they are doing to provide for our needs during this conference.

### Committee Assignments

Chairman Zenone indicated the following committee assignments have been made:

Sound Level (Hearing Loss) Committee: Karla Holland-Moritz (Chair), Bernice Beckerman, Richard Decker, Nancy Griffin, Paul Murphy and Henry Shaw.

Musicians' Medicine Committee: Catherine Compton (Chair), Carol Beck, Bernice Beckerman, Melanie Burrell, Karla Holland-Moritz, Doug Howard, Judith Litt and Rip Pretat.

Instrument Transportation Committee: Ralph Curry (Chair). Those who were later appointed to this committee were Craig Brown, June DeForest, Nancy Griffin and Jerry Montgomery.

Zenone asked that committees plan to meet today and tomorrow.

### ICSOM Directory

Henry Shaw will once again be responsible for the ICSOM Directory. He will contact us individually about information which is needed.

Zenone stated that as ICSOM delegates we are directly responsible for providing directory information; we should not delegate this work to anyone else. Delays in submitting information cause serious difficulties with publication of the directory, including the possibility that an orchestra could be totally omitted if information had not been provided. Since the directory is published only once every two years, this could be a serious situation.

The ICSOM Directory is for our use only, and we were cautioned that (as always) the directory is not to be shared outside the organization. The same warning applies to the minutes of the annual conference, which are a record of our proceedings. The Delegate Manual, also, is to be kept within the organization.

Zenone thanked Shaw for his work in compiling and producing the ICSOM Directory.

### IEB Report: Congress of Strings

Eugene Frey, President of Cincinnati Local #1, was on hand to represent the IEB and to report on the Congress of Strings. He greeted delegates and thanked conference participants as well as members of the Louisville Orchestra Host City Committee for their

hospitality. He said that he had grown up in the symphonic field and feels dedicated to improving our lives.

The Congress of Strings is now 26 years old, has helped to train 2,500 different string players, and has alumni in every major orchestra. Approximately 900 graduates are currently on the AFM rolls. An alumni association has been founded, with Gary Karr acting as its president. We constantly hear from former students that the eight weeks spent at the Congress of Strings was one of their most memorable experiences.

Originally founded because of a shortage of string players, the Congress of Strings has been a bootstrap operation. Local unions contribute \$500 for each scholarship, but the actual cost is more like \$1,000 per student. Additional money must therefore also be provided by the AFM, cooperating institutions and foundations.

Jobs are now better, there is a large pool of good string players, and we find ourselves asking whether we still need this training program. We are at a point where we must seriously consider either upgrading the Congress of Strings program or giving it up entirely. Problems in addition to funding include the lack of schedule availability of prestigious teachers and conductors for the eight weeks.

Solutions include increased involvement of a broad spectrum of advisors and an enlargement of the approach to teaching. Board members of the Congress of Strings now include Chairman Frederick Zenone and Don Whyte from ICSOM, Lew Waldeck, Cathy French (ASOL), and Nick Webster (Executive Director, New York Philharmonic), as well as AFM President Victor Fuentealba and IEB members Martin Emerson, Alan Wood and Eugene Frey. Zenone and Whyte visited this year's Congress of Strings on behalf of ICSOM.

The program itself, in addition to daily rehearsals, includes lessons and faculty chamber music performances, although emphasis continues to be on orchestra playing as a career. New aspects of this training are being seen in such activities as the seminars held by Frey, where students had an opportunity to learn about auditions, repertoire, union matters, wage charts, etc. A personnel manager talked with students, and the life and schedule of an orchestra musician was examined. The issues of job satisfaction and mental health were addressed.

Other activities scheduled for Congress of Strings students have included attendance at professional symphony orchestra rehearsals, opera productions, master classes, and appearances by well-known soloists. In addition, peripheral careers have been examined, including management and arts council participation.

Frey urged us to realize the need for greater involvement and input on our parts. This need applies to the Congress of

Strings and also to our relationships with our own local unions. We must remember that we are not islands in the symphonic field; the exchange must go both ways between local unions and symphony musicians. Cooperation and collaboration are important. Frey closed by thanking us for our efforts.

#### ICSOM Congress of Strings Committee Report

Chairman Zenone presented a Congress of Strings report on behalf of Don Whyte, who was absent because of a foreign tour. The Congress of Strings is in a process of evolution and is at a critical point. It is a unique educational program, completely funded through efforts of the union. There are now funds for only one location, teachers are busy in the summer and are often not available, and the union cannot afford to pay teachers enough to offset salaries.

The Congress of Strings Board has been broadened to include representatives of outside elements (for example, French and Webster, Zenone and Whyte). Zenone is vice-president of the Board. Those contacted and asked to serve as Congress of Strings advisors include Erich Leinsdorf, Leonard Bernstein, Mstislav Rostropovich, Pinchas Zuckerman, Zubin Mehta, and Gary Karr.

Participation in funding of Congress of Strings scholarships is notably missing from many of the local unions representing our twenty largest orchestras. We must go back to our union boards and get their participation; two scholarships would be preferable from the larger locals. In addition, we must encourage the most visible musicians in our orchestras to be available for Congress of Strings master classes. Music schools are not filling the need for orchestral career preparation; no major music school in our country is providing for this need. Zenone stressed that it is critically important that the unique Congress of Strings program be maintained and supported.

Questions from delegates followed, and additional information was provided by Zenone and Frey. A Congress of Strings scholarship is \$500, and this \$500 entitles a local to send a student. If a local union cannot sponsor a full scholarship, we should try to persuade at least some participation, such as co-sponsoring a scholarship with another local. The Congress of Strings likes to have some unrestricted scholarships in order to achieve a balance in instrumentation. Larger locals could be encouraged to give one regular and one unrestricted scholarship. ICSOM now sponsors the "George Zazofsky ICSOM Scholarship" as an ongoing memorial to the first chairman of ICSOM.

ICSOM Conference Attendance by Local Union Presidents

Dick Renna, President of Saint Louis Local 2-197, spoke briefly in support of participation at these meetings on the part of local union presidents. He felt that the information obtained is valuable in many areas, especially during local negotiations. Renna offered to write to other local presidents and encourage them to attend our annual Conference. Delegates applauded this suggestion.

AFM Symphony Department Report

Lew Waldeck, Assistant to AFM President Fuentealba, presented a report on current activities in the AFM Symphony Department. He also provided printed material on Symphony Department functions.

He said that Lynn Johnson, who has recently joined the staff, will be helping with supervision of the Symphony Department.

ROPA, the new Regional Orchestra Players Association, will be having its first meeting in Columbus, Ohio, on September 7th through the 9th. Waldeck intends to present to ROPA the concept of starting its own emergency relief fund. Although he has not officially invited to the ROPA conference those ICSOM orchestras which are regional orchestras, he said that they should feel free to come and share in the conference.

Sound levels and hearing are of continuing concern to the AFM Symphony Department. A baseline study of hearing has been designed by the New York League for the Hard of Hearing together with Montefiori Medical Center. They have asked that the Federation provide a whole symphony orchestra for the study, in order to make findings valid. The alternative is that they will go to several orchestras and get a random sample. Waldeck said that there could be difficulties with both of these approaches.

Waldeck described a dosimeter, which is a device designed to read the average exposure to noise over a period of time. Readings are in terms of the percentage of permissible exposure. He is trying to obtain some of these devices, which clip to the collar of the person whose exposure is being measured.

A hearing conservation study is being conducted by Donald H. Woolford, an engineer with the Australian Broadcasting Corporation. Waldeck indicated that Woolford is at present the largest repository in the world of hearing information. He asked us to take Woolford's questionnaire back to our orchestras, make copies for our colleagues, and get as many completed responses as possible. These responses should be sent to Waldeck, who will compile them and forward them to Woolford. He urged us to cooperate with this Australian study and to include information about the percentage of responses in relation to the total number of musicians in each of our orchestras.

The AFM Symphony Department is in the process of making a list of tour doctors. Delegates should contact Lynn Johnson with names and addresses of such doctors. Chairman Zenone added that most orchestras who tour abroad do take doctors along.

Waldeck has met with officials of Ayerst Laboratories, the manufacturers of Inderal (propranolol hydrochloride). Ayerst is concerned about dangers of use of this drug in certain situations, and says that it was not intended for use as an anti-stress medication. Serious side-effects can occur, especially in persons with asthma, because it suppresses adrenalin. Since Inderal is a "chemical pacemaker", those who use it and then discontinue use must taper off gradually, or heart problems could occur. Waldeck will get information about all of this to Tom Hall for inclusion in Senza Sordino. Waldeck may also need information from us via a confidential questionnaire; we were urged to cooperate with this request.

Hall stressed that Inderal is a prescription drug and has potent side-effects, per an article which appeared in Senza Sordino two years ago. He cautioned against indiscriminate use, and warned us about the dangers of sharing a prescription drug with others. The drug is benign in most cases, but can be dangerous under certain conditions and should be used only under medical supervision. Henry Shaw added that Inderal slows the heart rate and could cause unconsciousness if the user's heart rate becomes too slow. It is widely prescribed for hypertension.

Delegates discussed further aspects of this type of drug use, including audition situations. Waldeck repeated that the drug is not indicated as an anti-stress medication according to the FDA. Some physicians may not know what dosages to prescribe for our needs.

The green printout sheets containing wage chart information were discussed, and Waldeck asked delegates to insert updated contract information on the sheets. This data will be put into the Symphony Department's computer, and compiled information can then be sent to us as soon as possible. Those in negotiations should keep the green printouts and send them from home to Waldeck.

Media cards are needed from all of us; Waldeck described the cards and how they should be used. He will send each delegate a new packet of cards together with a set of instructions. Since the media card is just a postcard, it is a simple matter to fill it in and mail it. Chairman Zenone stressed that we need this information from our orchestras, and often it isn't provided by delegates. This leaves the ICSOM Media Committee in an extremely

difficult position at negotiations, when managements have their information but we don't have ours. Delegates are responsible for seeing that media cards are sent in.

#### ICSOM Emeritus Program Report

Abe Torchinsky, who has been in charge of the ICSOM Emeritus Program, reported that there have been 63 responses to date, with 16 different orchestras reporting. The program is designed to recognize retired members of ICSOM orchestras; those who qualify will receive subscriptions to Senza Sordino and may be listed in the ICSOM Directory. Requirements for the ICSOM Emeritus Program are described in the Delegate Manual. Torchinsky has provided a form for us to copy and use in contacting retirees.

All replies and inquiries should be sent directly to Abe as follows:

Abe Torchinsky  
654 Greenhills Dr.  
Ann Arbor, MI 48105

Delegates shared information about their own orchestra's retirees, together with ideas about how to maintain ongoing contact with them, and to provide additional services for them such as meetings and discount concert tickets.

Our retired members are a significant resource for our orchestras. Delegates are responsible for the requested contacts with these retired members. It is permissible to ask others to assist us in the work of making these contacts, but as delegates we are still ultimately responsible.

#### Negotiations Reports

Reports were given by delegates from the following orchestras, whose negotiations are in progress and/or have been recently concluded and not yet fully reported:

Atlanta Symphony (Michael Moore)  
Saint Paul Chamber Orchestra (Carole Mason Smith)  
Philadelphia Orchestra (Marcel Farago)  
Louisville Orchestra (Pat Brannon and Patricia Story)  
San Antonio Symphony (Ellen McGlone)  
Rochester Philharmonic (David Angus)  
National Symphony (Larry Bocaner)

San Francisco Opera Orchestra (Peggy Lucchesi)  
Syracuse Symphony (Richard Decker and Kevin Ladd)  
Pittsburgh Symphony (Penny Anderson)  
New York City Ballet Orchestra (Joe Schor)  
Los Angeles Philharmonic (Donald Muggeridge and  
Michael Nutt)

Delegates discussed various matters concerning these negotiations, including how we can be most effective with our communications to orchestras who are going through strikes or lockouts.

Also addressed was the issue of the dues collection clause, which has been referred to as the "Saint Louis clause", since it first appeared in the Saint Louis Orchestra's contract as that orchestra's negotiated means of collecting dues. This approach has also been incorrectly called the "ICSOM clause". Chairman Zenone stressed that there is no such thing as an "ICSOM clause", since we assess ICSOM dues by orchestra. How these dues are collected is entirely up to each individual orchestra.

Delegates from orchestras who are in negotiations or who have recently settled were asked to meet with Tom Hall and Nancy Griffin following the afternoon session. The meeting was called as a briefing to outline the procedures to be used in submitting reports for the ICSOM Bulletin and Senza Sordino.

#### Directions for Involvement in Planning and Policy Matters

Stephen Klein, Executive Director of the Denver Symphony, was introduced by Chairman Zenone. Klein expressed his pleasure at being with us.

Describing the process of communication which has evolved in Denver, he explained that it was born out of chaos, including strikes, lockouts, and an atmosphere of fear and mistrust. Some enlightened board members saw a need for change and improved communication, and together with musicians, management and union, new approaches were brought about. Eventually, real communication began to occur.

Klein reminded us of the reality that we are all in this together, and that we share the goals, responsibilities and problems of trying to prepare and present music. The process is one of developing trust and communication, while recognizing that no "cog" in the system can work without the others. The evolution of trust and communication includes the inevitable possibility of being hurt. The outreach must be mutual, and desired by all parties.



A strong trust in leadership must exist for all, so that those involved are truly led by their leadership. Ethics are important, meaning that there must be honest sharing, but with trust in the confidentiality of the exchange. The process is a long one, involving many meetings and much effort to perceive all sides of each issue.

Challenges in Denver included a search for music director, money problems, efforts to increase community pride in the orchestra, and a need to enhance the orchestra's artistic relationship with audience and community. Such challenges never go away, and must be faced. Denver's channels of communication have included a long-range planning committee which includes musicians, as well as regular board meetings where musicians attend as observers. The UMMB (BUMM) committee of union, musicians, management and board functions with a basic rule that no subject is taboo. In addition, the orchestra committee meets regularly with management, and at monthly orchestra meetings management and board observers are present. Klein said that he welcomes advice, help, suggestions and criticism, and believes that orchestra and board share this position. He feels that the only way to have a fighting chance to solve problems and improve the situation, if not just to survive, is to share our concerns and face difficulties with our combined forces.

Melanie Burrell spoke as a member of the Denver Symphony who had also been involved in this process. She agreed that it must be a "together" effort.

Following Klein's presentation, a panel of delegates joined with Klein to discuss these issues in a question and answer format. The panel included Larry Bocaner (National Symphony), Ralph Curry (Cleveland Orchestra), Jim Klute (Minnesota Orchestra), and Ellen McGlone (San Antonio Symphony). Concerns of the panel included musician representation on boards of directors, hierarchy in committees (Klein said agenda and leadership at meetings are very informal), and composition of committee membership (about 30 of Denver's 77 board members regularly participate). Details were given about how committee meetings are actually conducted and how the music director fits into the process.

The panel discussed whether this kind of approach can only evolve from a crisis situation. Klein indicated that he wasn't certain, but felt that perhaps a crisis provides the pressure necessary to bring about change. Burrell added that the success of this type of approach depends upon the people involved, and that in Denver all parties were willing to be inventive, flexible and give it a try. The preference for the adversary approach in some orchestras was addressed by the panel.

Following the panel discussion, delegates continued the question-and-answer session with Klein. Klein stressed that his approach depends upon being as open as possible, sharing information and financial details. Chairman Zenone reminded us that contract negotiations are a separate kind of dialogue from the ongoing day-to-day dialogue described here. Each situation must be examined individually, remembering always that people are more important than structure.

Klein concluded his presentation and was thanked for his participation before he left the meeting.

The discussion among delegates continued after he left. Zenone characterized this type of approach as something which is possible because of energy from our side. However, we must be realistic and not have false hopes and expectations of instant success. Delegates agreed that situations can change and that what works now may not work forever. Also, an approach which works for one orchestra may not be appropriate for another.

#### Nominations

In anticipation of elections to be held during the Friday session, nominations were opened for members of the ICSOM governing board and members at large. Vacancies were based upon the reorganized structure of ICSOM as discussed and approved at the Tuesday session.

Nominated for executive committee offices at this time were the following:

Chairman	Frederick Zenone
President	Melanie Burrell
Secretary	Nancy Griffin
Treasurer	Catherine Compton
	Penny Anderson
Editor, <u>Senza</u> <u>Sordino</u>	Tom Hall

A motion was made to retain the four incumbent regional vice-chairpersons, all of whose terms expire next year, to serve out their terms under the new title of "members at large" (Motion #12, Moore/Burrell). It was decided to defer action on this motion until after delegates have elected the five members of the executive committee.

FRIDAY, AUGUST 31, 1984

The conference was called to order by Chairman Frederick Zenone. The roll call of orchestras was delayed so that it would occur as delegates handed in their ballots for the election of officers.

Announcements included a correction by Strike Fund trustee Melanie Burrell. She indicated that the written report should state that the maximum number of weekly benefits is 15 rather than 14. She also reminded us that the first week of a work stoppage is a "waiting" week and is not paid.

### Elections

Chairman Zenone appointed an election committee which consisted of Karla Holland-Moritz, Doug Howard and Michael Moore.

For the offices of chairman, president, secretary, and editor of Senza Sordino there were no additional nominations, so those elected by acclamation for the coming two years were:

Chairman	Frederick Zenone
President	Melanie Burrell
Secretary	Nancy Griffin
Editor, <u>Senza</u>	
<u>Sordino</u>	Tom Hall

By secret ballot, delegates elected Penny Anderson to serve as treasurer for the coming two year term.

Discussion was held on the motion (Motion #12) to retain the four incumbent regional vice-chairpersons to serve out their terms under the new title of "members at large". Concern was expressed that such an action would preclude nominations from the floor. It was agreed that, while the motion did foreclose additional nominations, a vote would indicate whether further nominations were desired. The motion passed, but not unanimously, so the floor was opened for nominations.

Those nominated for the four positions of members at large were Bernice Beckerman, Catherine Compton, Ralph Curry, Michael Nutt and Donald Whyte.

Delegates elected by secret ballot the following members at large:

Bernice Beckerman  
Catherine Compton  
Michael Nutt  
Donald Whyte

The first term for the new members at large will be a one year term; following that (starting next year) the term of office will be two years.

### Copying of Music

Concern about the use of non-union copyists was expressed in a discussion which resulted from a letter written by the American Society of Music Copyists and presented by Joe Schor and John Donohue. A union scale exists for copying music, and we should be aware of the need to support the use of union copyists. In orchestras where the master agreement includes copying as part of the job description for librarians, the librarian's pay is the scale for copying. Delegates talked about the subject at length, identifying various problems related to copying.

A motion was passed to recommend to the Federation the exclusive use of AFM copyists and the payment of appropriate wage scales for all copying of music for use in our member orchestras (Motion #13, Moore/Beckerman).

The following is the main part of the text of the letter dated August 1, 1984, from the American Society of Music Copyists (Box 41, Radio City Station, New York, NY 10101), signed by Don Stewart, Treasurer. The letter is addressed to Joe Schor and asks him to bring it to the attention of our conference:

"We're very greatly concerned and, simply, put out of work, by the large amount of non-union music copying that's currently showing up on the music stands of this country's orchestras. It seems to be a growing problem.

At first glance, this problem seemed easily correctable, since all members of the American Federation of Musicians should be bound by the AFM Constitution and By-Laws (Article 13, Section 5, 9, 23, 26, et al.) These would indicate that members are not to perform when materials prepared by non-union musicians are put before them. Yet as I have noted, use of non-union, underscale copying is proliferating.

We believe the librarians of each orchestra must be our first line of defence on this matter. It is they who see the materials first. However, before all of us put the librarians in an untenable spot, we urge that ICSOM be on record to the various orchestra managements that all newly prepared materials must be prepared by AFM members only, and that each job of music copying be contracted and billed in accordance with the relevant Local's Music Preparation procedures. Most often, this procedure was constructed and is maintained via the American Society of Music Copyists.

The ASMC has always been most supportive of the orchestral players' concerns, and this is especially true in Local 802 jurisdiction. We urge that you bring this matter before your colleagues, and hope you'll be able to report to the American Society of Music Copyists that positive action was taken."

### Credit Ratings

Delegates were asked by Chairman Zenone whether they know of instances where members of our orchestras have difficulty obtaining credit. The response indicated that there are no major problems in this area, although some individual difficulties have existed. During the brief discussion, suggestions were made by delegates about how we can best identify ourselves on credit and insurance applications in order to avoid discrimination.

### Tax Case

Counsel Philip Sipser presented a brief update on the tax case, which concerns the issue of an income tax deduction for a home practice studio. Delegates asked questions and provided examples of related situations. Counsel Sipser advised us to take the deduction where we feel we are entitled to it. ICSOM orchestra members had already been warned that the possibility of an audit exists where we do claim such a deduction.

### Strike Fund Committee

Henry Shaw reported as chairman on behalf of the subcommittee which had been appointed to study the issue of AFM Strike Fund membership. Other members of the committee were Melanie Burrell, Doug Howard, Ellen McGlone and Jim Ramey, together with Lew Waldeck from the Federation.

Shaw said that after much deliberation, the committee unanimously determined that the increase in annual salary requirement to \$15,000 for new member orchestras is completely reasonable. He reminded us of the origin of the AFM Strike Fund, which was an important parallel to our greatest priority when we first became an organization: ratification of our contracts. Our ability to say "no" to a contract brought with it a need to have something to fall back on. The ICSOM Emergency Relief Fund was not enough, so an agreement was reached with the Federation in 1970, whereby the Federation provided an initial \$250,000 toward the Fund. Original AFM Strike Fund benefits were \$50 a week; benefits were later raised to \$100 a week.

The committee also agreed that it is best to keep the status quo with regard to orchestra membership size requirements. As new member orchestras come into the Strike Fund, more service is provided. However, when the number of orchestras in trouble increases, there is a drain on the fund. The value of the fund also can be decreased because of the economy. Therefore, we must try to do the best with what we have. It is impossible to satisfy every orchestra who would like to join, although the Board of Trustees of the Strike Fund is often under great pressure to do so. Shaw stressed, however, that the trustees welcome individual requests and do deliberate on the basis of individual orchestra's applications. As we know, exceptions have been made in the cases of some individual orchestras.

We will continue to urge those ICSOM orchestras who qualify for AFM Strike Fund membership, but do not yet belong, to apply for membership.

A motion was passed to accept the report and conclusions of the Strike Fund Committee (Motion #14, Angus/Niwa).

#### ICSOM By-laws

Chairman Zenone noted that draft copies of the suggested new ICSOM By-laws, based upon reorganization of the structure of ICSOM, are in the hands of delegates. Counsel will make any necessary grammatical changes. Provision for nominations from the floor will be included.

A motion was passed to change the ICSOM By-laws to incorporate restructuring as presented by the ICSOM executive committee (Motion #15, Bocaner/Shaw).

#### Tribute to Brad Buckley

Tribute was paid to retiring ICSOM vice-chairman Brad Buckley by Chairman Zenone, who remarked that he had met no person who had contributed more and given such untiring energy and devotion on behalf of this organization. Buckley, Zenone said, had moved mountains for all of us, traveling throughout the country, serving on innumerable committees, and spending endless hours on the phone, often doing work which was crucial but not visible to all of us. His retirement from office leaves a big gap, as both colleague and friend. A gift was presented to Buckley on behalf of the ICSOM governing board and counsel.

The conference responded with a standing ovation for Buckley.

Buckley expressed appreciation of this conference and its delegates. He said that he had found it rewarding to work with all of the officers of ICSOM and spoke with special appreciation of his close working relationship and friendship with Chairman Zenone.

He emphasized that ICSOM represents the orchestra musicians in this country, and that we are known for our history of effective work with managements, with the Media Committee, etc. Information to help us is available through our organization, and we feel a part of an ongoing process. The new reorganization, which fulfills one of Buckley's deepest wishes, will enable us to move forward even more effectively. ICSOM is our strength, our pride, and our glory.

Delegates responded with another round of applause in appreciation of Buckley and his unique contributions to our organization.

#### Reimbursement of Conference Expenses

Delegates shared information to determine about which orchestras do not receive full local union support of ICSOM conference expenses for their voting delegate. Chairman Zenone also asked about problems delegates encounter in being excused from work in order to attend the conference.

#### Retainer of Counsel and Fee

It was the unanimous recommendation of the executive committee that counsel be retained for the coming year with a modest increase in fee. Philip Sipser and Leonard Leibowitz have been with us since 1969 and have received only one increase in fee during that time; five years ago their fee was raised to \$18,000 including expenses. The executive committee recommended that we increase counsel's fee to \$20,000 per year plus expenses of transportation and hotel for the annual conference.

A motion was passed to retain counsel at the new fee recommended by the ICSOM executive committee (\$20,000 per year plus expenses of transportation and hotel for the annual conference) (Motion #16, Moore/Angus).

### Site and Dates for 1985 Conference

An offer to host the 1985 ICSOM conference in San Francisco was presented by the four ICSOM member orchestras who belong to San Francisco Local #6. The San Francisco Symphony, San Francisco Opera Orchestra and Oakland Symphony delegates stood and Marguerite Figeroid presented the invitation on behalf of their orchestras. In extending the invitation, they also represented the San Francisco Ballet Orchestra, whose delegate was unable to be at this conference.

Possible dates for the 1985 conference were discussed in detail, with the usual concern for schedules of our orchestras especially with regard to foreign tour conflicts. It was decided to hold the 1985 ICSOM conference in August, with meetings scheduled from Wednesday through Sunday in order to allow for the best savings on air fares. Two possible sets of dates were chosen: August 14-18, or August 7-11. The final decision will be made by the executive committee and our San Francisco hosts.

### ICSOM Committees

Chairman Zenone stressed that members of various ICSOM committees should be aware of their tie to the executive committee. The chairman and president are automatically ex officio members of all committees. He cautioned us about use of questionnaires; all such items to be mailed out by committees should first be approved by the executive committee.

Secretary Nancy Griffin offered to assist committees by typing and mailing materials which are to be sent out to delegates.

### Good and Welfare

Senza Sordino Editor Tom Hall reminded us of his need for copies of old Senza Sordino issues. He would also like to receive articles concerning our field which we may find in our local newspapers.

He cautioned us again about use of the Delegate Manual, reminding us of the importance of handling it as confidential material.

Hall expressed appreciation and thanks for the contributions made to this organization by Chairman Zenone, Henry Shaw, and Brad Buckley.



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Chairman Zenone gave special thanks to our Louisville hosts under the leadership of Pat Brannon for a remarkable job of providing for all of our needs.

Delegates gave a standing ovation for Brannon and her colleagues.

Brannon responded with thanks to her Louisville colleagues for their involvement and help and said that hosting the conference had been an enjoyable experience.

In closing, Chairman Zenone paid tribute to the cooperation of the entire conference. He expressed appreciation for the talents and contributions of the delegates and for their wonderful patience. He said he felt awe and gratitude for the enormous amount of work we had accomplished in these five days.

The 1984 ICSOM conference was adjourned.

A handwritten signature in cursive script, reading "Nancy Page Griffin". The signature is written in dark ink and is positioned above the printed name and date.

Nancy Page Griffin  
October 30, 1984

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

Affiliated with the American Federation of Musicians - AFL-CIO

## MOTIONS

1984 CONFERENCE  
Louisville, Kentucky

The following motions were approved:

1. To approve the minutes of the 1983 ICSOM conference (Garner/Howard).
2. To refer questions about AFM Strike Fund membership to a special committee, which will study and report back to the conference (Howard/Decker).
3. That the chairman appoint the subcommittee to study the issue of AFM Strike Fund membership, and that the entire matter subsequently be referred to the ICSOM executive committee for recommendation to the Federation (Howard/Bartlett).
4. To support the recommendation of Mendelson Fund Chairman Irving Segall that he study the problems concerning the competition for the Mendelson Fund award, and that if it is necessary, that the ICSOM executive committee be empowered to put the Mendelson Fund assets to another use in the name of Ralph Mendelson (Niwa/Moore).
5. To accept all officers' reports (Shaw/Angus).
6. To accept the Saint Paul Chamber Orchestra into membership in ICSOM (Niwa/Bocaner).
7. To raise ICSOM membership requirements to \$15,000 annual gross income per player for non-member orchestras applying for membership (Hall/Howard).
8. To adopt the Code of Ethical Practices for National and International Auditions, and to encourage our orchestras to follow these practices (Angus/Holland-Moritz).
9. To accept reorganization of the structure of ICSOM as presented by the chairman on behalf of the executive committee (Bartlett/Smith).
11. To establish a committee to study instrument transportation on airlines (Decker/Hall).
12. To retain the four incumbent regional vice-chairpersons, all of whose terms expire next year, to serve out their terms under the new title of "members at large" (Moore/Burrell).

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13. To recommend to the Federation the exclusive use of AFM copyists and the payment of appropriate wage scales for all copying of music for use in our member orchestras (Moore/Beckerman).
14. To accept the report and conclusions of the Strike Fund Committee (Angus/Niwa).
15. To change the ICSOM By-laws to incorporate restructuring as presented by the ICSOM executive committee (Bocaner/Shaw).
16. To retain counsel at new fee, as recommended by the ICSOM executive committee (\$20,000/year plus expenses of transportation and hotel for the annual conference) (Moore/Angus).

The following motion failed to pass:

10. To vote by secret ballot on the question of reorganization of the structure of ICSOM (Ramey/Niwa).

A handwritten signature in black ink, reading "Nancy Page Griffin". The signature is fluid and cursive, with the first name "Nancy" starting with a large loop, and the last name "Griffin" ending with a long, sweeping tail.

Nancy Page Griffin  
October 30, 1984