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# A Design Thinking Approach To Leadership Development

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Submitted to the Program of Organizational Dynamics in the Graduate Division of the School of Arts and Sciences in Partial Fulfillment of the Requirements of the Degree of Master of Science in Organizational Dynamics at the University of Pennsylvania.

Advisor: John Pourdehnad

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# A Design Thinking Approach To Leadership Development

## **Abstract**

This thesis argues that a systems and design thinking approach to education can have a transformational affect on individuals and organizations. This thesis looks at the Curtis Institute of Music and how the school is challenging students to expand their thinking by involving a diverse group of stakeholders in the complete redesign of performance experience. A description of an interactive planning and idealized design project, called the Curtis Leadership Workshop, is presented. This thesis specifically provides an overview of the theory, model and applied methodology, and an account of the preparation for and first critical steps of the project. Outcomes of critical steps are presented and a number of research questions for a formal impact analysis are proposed.

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TO LEADERSHIP DEVELOPMENT

by

Tamara Nuzzaci

Submitted to the Program of Organizational Dynamics  
in the Graduate Division of the School of Arts and Sciences  
in Partial Fulfillment of the Requirements of the  
Degree of Master of Science in Organizational Dynamics  
at the University of Pennsylvania.

Philadelphia, Pennsylvania

2010

A DESIGN THINKING APPROACH  
TO LEADERSHIP DEVELOPMENT

Approved by:

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John Pourdehnad, Ph. D., Advisor

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## ABSTRACT

This thesis argues that a systems and design thinking approach to education can have a transformational affect on individuals and organizations. This thesis looks at the Curtis Institute of Music and how the school is challenging students to expand their thinking by involving a diverse group of stakeholders in the complete redesign of performance experience. A description of an interactive planning and idealized design project, called the Curtis Leadership Workshop, is presented. This thesis specifically provides an overview of the theory, model and applied methodology, and an account of the preparation for and first critical steps of the project. Outcomes of critical steps are presented and a number of research questions for a formal impact analysis are proposed.

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## LIST OF TABLES

TABLE		Page
1	Original Design Planning Schedule	28
2	Original Design Planning Participants	29
3	Idealized Design Session Participants	43
4	Core Design Team Participants	45
5	Stakeholder Specifications as Five Major Thrusts	50

## LIST OF FIGURES

FIGURE		Page
1	Interactive Planning at Curtis	23
2	Website Homepage Navigation	33
3	Student Recital Influence Diagram	38
4	A Systemic View of Curtis Student Recitals	46
5	Visual Representation of Stakeholder Specifications	49
6	Common Words Found in Stakeholder Specifications	49



## TABLE OF CONTENTS

	Page
ABSTRACT	iii
ACKNOWLEDGEMENTS	iv
LIST OF TABLES	v
LIST OF FIGURES	vi
CHAPTER	
1 Introduction	1
Curtis Institute of Music	
The Curtis Curriculum	
Purpose of Thesis	
2 Literature Review	7
Role of Mindset	
Mechanistic Thinking	
Systems Thinking	
Design as a Learning Process	
Ackoff's Approaches to Planning	
Transformational Leadership	
3 Methodology	21
Principle of Idealized Design	
Idealized Design Steps	
Role of the Facilitator	
4 Preparing for Design	27
Organizing the Process	
Developing a Mission	
Learning Space	
Orientation	
Summary	
5 Mess Formulation	37
Participants	
Formulating the Mess	
Summary	
6 Idealized Design	42
Concept Generators	

Stakeholders	
Facilitators and Observers	
Concept Implementers	
Generating Stakeholder Specifications	
Five Major Thrusts	
Summary	
7 Conclusion	53
Next Steps	
Emerging Themes	
Recognition and Readiness to Change	
Time, Incentive, and Trust	
Participation and Learning	
Conclusion	
NOTES	62
REFERENCES	63
APPENDIX	
A Noted Curtis Alumni	
B Mess Presentation	
C Probing Questions	
D All Stakeholder Specifications	
E Stakeholder Specification Synthesis	
F Five Major Thrusts	
G Recital Blueprint	

## CHAPTER 1

### INTRODUCTION

#### UCurtis Institute of Music

The Curtis Institute of Music first opened its doors on October 1, 1924. The school was founded by Mary Louise Curtis Bok, the only child of Philadelphia-based Louise Knap and Cyrus H.K. Curtis whose Curtis Publishing Company produced two of the most popular magazines in America – *The Saturday Evening Post* and *The Ladies Home Journal*. With artistic guidance from conductor Leopold Stokowski and the renowned pianist Josef Hofmann, Mrs. Bok established one of the world’s leading conservatories with the chartered purpose “to train exceptionally gifted young musicians for careers as performing artists on the highest professional level” (<http://curtis.edu/>).

Students may pursue a Diploma, Bachelor of Music, Master of Music in Opera or Professional Studies Certificate in Opera. In addition to complete and diversified training in classical music performance, Curtis provides courses in musical studies, liberal arts, and career studies. Admission to the school is solely based on artistic talent and promise. To be able to select those students who demonstrate the greatest potential as performing artists, the school provides full-tuition scholarships to all of its students and has maintained this policy since 1928 (Burgwyn, 1999).

Each year Curtis enrolls just enough students to complete a full orchestra and a select opera department, plus a small number of piano, organ, composition, and conducting students. In 2010, 1032 individuals applied, 837 auditioned and only 46 were accepted. Of those accepted, almost none choose to go elsewhere, giving Curtis one of the highest yield rates in the world. Curtis’s student population is not only

extraordinarily talented, but also exceptionally diverse in nationality and age. On average, forty-seven percent (47%) of students are foreign citizens. Student ages range from eleven to twenty-nine; however, most students are between the ages of seventeen and twenty-three. The length of a student's stay is open-ended and can be anywhere from two to twelve years. Students graduate when their teachers decide they are ready. In most cases this is between three and five years (Curtis Institute of Music, 2009).

Over the years many Curtis graduates have made musical history as solo performers, composers, and conductors, as well in chamber groups. Alumni have received top honors such as Pulitzer Prizes, Guggenheim Fellowships, and Avery Fisher awards. They can also be found in almost every major orchestra and opera company around the world. In fact, of all the musicians in the top 25 major orchestras in the United States and Canada, 224 are Curtis-trained, with 65 holding principal chairs. Among the players of the Philadelphia Orchestra, nearly half are Curtis alumni. Proportionately, Curtis has produced the largest body of notable musicians of any conservatory in the world (see Appendix A).

### Curtis Curriculum

The major tenet of the Curtis education is based in Mrs. Bok's desire that "Students shall learn to think and express their thoughts against a background of quiet culture, with the stimulus of personal contact with artist teachers who represent the highest and finest in their art" (<http://curtis.edu/>). Students at the Curtis Institute of Music learn to perform by engaging in performance – they practice that at which they seek to become adept. The curriculum is primarily practicum. Scholarship in musical

studies, liberal arts, and career studies finds a marginal place at the edges of the curriculum because it is assumed that such domains are significantly unrelated to performance.

Curtis's clear mission compels the school's leaders to remain mindful of the skills and capacities its graduates must possess in order to forge a career on the highest professional level. This is especially important today, as the musical world is changing faster than ever. Performing careers are very different in 2010 than they were at the turn of the century, or even five years ago. According to the study "Performing Arts in a New Era," changes in the environment likely to affect future careers of performing artist include, an increasing prominence of superstars; more artists, fewer job opportunities; and intellectual property questions created by new technologies (McCarthy, Brooks, Lowell & Zakaras, 2001). These coupled with a struggling economy, shrinking financial resources, and an audience base with more entertainment options make conventional employment paths more challenging, even for the most talented musicians. As a result, the Curtis leadership is compelled to critically examine, evaluate, and modify the degree to which and ways that the curriculum prepares students to thrive in this turbulent environment. Such reflection concerns their own sustainability as well as their commitment to incoming and current students, and the broader communities and performing arts industries. President Roberto Díaz agreed the time was right to encourage Curtis administrative leaders and musicians to rethink the traditional performance experience.

One characteristic in the current system, which focuses on learning to perform by engaging in performance, is the highly personalized nature of the curriculum and

uncommonly frequent number of performance opportunities. With only about 160 students enrolled, the school's small size creates a nurturing environment for learning and permits an ongoing dialogue between all students and faculty. Recognizing that the relationship between the student and the artist-teacher is of primary importance to the development of a young musician, the school maintains a student-faculty ratio of 2:1. The artist-teachers who make up the faculty are largely performing musicians who connect students to the experience of being a distinguished artist today and also have a direct lineage to the great masters of the past. With over 130 performances each school year, Curtis creates a virtual world – one which is relatively free of the pressures, distraction, and risks of the real performance world – that enables students to learn by doing under the close guidance of a supportive community of artist-teachers and fellow students.

Based on the 2009-2010 course evaluations and the decision to eliminate one of only two career studies courses, it is clear that the leadership and students agree that the remaining course, the 21PP<sup>st</sup> Century Musician, is valuable in helping students think about the operational characteristics of being a professional musician and the ways one can select and manage a career. It is required of the majority of students enrolled. The description reads:

An exploration of how the classical music industry works and how students can tailor their skills to create their own varied, rewarding, and sustainable professional paths. Topics include obtaining a job, orchestral life, freelancing, grant-writing, and managing money, time, and stress.

Attending this single lecture, of course, is inadequate and seems unlikely to substantially affect a student's thinking or behavior. Indeed, from a curricular perspective, assigning the topic of career studies to the edges argues that it is not important, compared to the

central issues of traditional performance. The outcome is that students perceive their career management and operations as marginal, and, the majority of student performances fit traditional models despite the turbulent world into which these students are moving and the leadership advice that one should rethink the experience.

Based on my experience as a musician and administrator, I believe the motivating commitment to all learning at Curtis stems from the artist-student relationship. If the leadership expects students to rethink the traditional model, then an environment that encourages the artist-teacher and student to rethink about the performance experience together in lessons and coachings must be created. The current educational system reinforces the current behavior and outcomes. I argue that to change the outcomes this behavior requires the involvement of the artist-student relationship in a systemic redesign the nature of performance.

### Purpose of Thesis

Over the past three years, I found my artistic background, professional experience, and my academic experiences, which have included the study of leadership, systems, and complexity; converging in the concept of design thinking. I have become increasingly interested in testing how my knowledge and experience working side-by-side some of the world's most talented artists could help prepare young musicians for the challenges of professional life. I began to wonder how the process of interactive planning and idealized design could apply to curricular issues facing the school. Specifically, I wanted to measure the impact of a design planning application on student development. With the support of Curtis's leadership, in July 2010, the decision was

made to engage students, faculty, staff, and stakeholders in a project called the Curtis Leadership Workshop that would redesign the nature and delivery of musical performance.

The purpose of this capstone is to describe the preparation for and several of the critical steps of the Curtis Leadership Workshop project. In particular I provide an overview of the theory, model and applied methodology, and offer an account of engaging in the organization process and facilitating the first two steps. The account is from my perspective as strategic leader of the project, facilitator, and student in the Organizational Dynamics program. As the strategic leader, my interest lies in a desire to shift musician mindset and inspire transformational change in the classical music industry. From a practical perspective, I wanted to provide a means to meet Curtis's need to replace a career-related course. As a facilitator, my interest was to encourage development through the systems and design thinking approach. Lastly, as a student, I want to understand the possible impact the interactive planning and idealized design process. These three roles and their respective expectations, purposes, and interests inform this capstone.

The format is as follows: Chapter 2 reviews the literature on systems thinking, design as a learning process, and interactive planning. Chapter 3 describes the interactive planning and idealized design methodology, including a discussion the underlying principles and the role of the facilitator. Chapter 4 presents my account of the preparation for the planning process. Chapter 5 and Chapter 6 presents a description of the first two steps in the idealized design process, mess formulation and ends planning respectively. I offer a summary and conclusion in Chapter 7.



## CHAPTER 2

### LITERATURE REVIEW

#### Role of Mindset

The concept of mindset, also referred to as paradigm, is rooted in the influential work of philosopher and historian, Thomas Kuhn. In his book *The Structure of Scientific Revolutions*, Kuhn (1962) first used the term “paradigm shift” to describe a change of basic assumptions in scientific research; however, he did not consider the concept of paradigm as appropriate for the social sciences. Kuhn explains in the preface that he concocted the concept of paradigm precisely in order to distinguish the social from the natural sciences.

Mindset is commonly described as the filter through which people make sense of the world. Cognitive psychologists use the term mental map or cognitive schema to describe the concept of mindset, and have a long history of using the term mindset to address the question of how people make sense of the world in which they interact (Govindarajan & Gupta, 2001). The concept can also be described as a set of assumptions, methods or notations held by one or more people or groups of people which is so established that it creates a powerful incentive within these people or groups to continue to adopt or accept prior behaviors, choices, or tools. Simply defined, mindset is a habitual or characteristic mental attitude that determines how you will interpret and respond to situations (<http://wordnetweb.princeton.edu/perl/webwn?s=mindset>).

Every culture has a shared pattern of thinking. Few people within a culture can articulate its prevailing worldview and its embedded way of thinking because most absorb them unconsciously while growing up. Most of us are not aware of how we

arrived at our present mindset or for that matter the existence of a prevailing worldview within ourselves (Ackoff, 1999). We were involuntarily conditioned to think like we do. Therefore, changing the mindset requires recognition that what we are doing is not working (Pourdehnad, Warren, Wright & Mairano, 2006).

The phrase, thinking outside the box, is a helpful analogy for understanding the concept of mindset and a change in patterns of thought. The box represents normal science, and, therefore, thinking inside the box encompasses the thinking of normal science. Thus the box is analogous for paradigm. Thinking outside the box would be what Kuhn calls revolutionary science. On the rare occasion when revolutionary science is successful, it leads to large-scale changes in worldview. When a major shift is adopted by the majority, it, then, becomes the box and science progresses within it.

### Mechanistic Thinking

A large-scale shift from a mechanistic to a systemic worldview is under way. Since the Renaissance that took place in the fourteenth and fifteenth centuries and through the early part of the 20<sup>th</sup> century, the prevailing mindset developed out of the belief in the world as a machine, not just like a machine. As a result, the Industrial Revolution stemmed from the thinking that machines could solve all problems and improve quality of life. In order to build better machines, man reduced systems to their smallest parts in order to reproduce the parts and actions by machines (Ackoff, 1981).

Ackoff (1981) describes four methods of inquiry used during the Machine Age: analysis, reductionism, cause and effect, and determinism. Analysis is a three-stage process: take apart the thing to be understood then explain the behavior of each part taken

separately, and, lastly, aggregate the explanation of the parts into an understanding of the whole. Reductionism is the belief that all things can be reduced to ultimate indivisible elements. Complex systems were understood by analyzing the sum of its parts (Ackoff, 1981). Interactions between elements are explained through the concept of cause and effect, or causality. Causality is the relationship between an event (the cause) and a second event (the effect), where the second event is a consequence of the first. Rooted in the belief that it possible to understand the world completely, determinism is the concept that everything is taken as the effect of some cause, otherwise it cannot be understood. The embodiment of these concepts is research, which enables the development of instructions based on theory (Ackoff, 1981).

The pace of technological development over the last century is testimony to the significance of the mechanistic mode of thinking. However, by World War II scientists, engineers, and technologists began to realize that the mechanistic framework was not always effective. This was particularly evident in the examination of human-activity systems and systems with a strong human-technology mix. In the late 20<sup>th</sup> century rapid changes in technology increased interconnections between people, places, and things. Globalization - the idea of the world as a total system – brings with it ever-increasing awareness chaos and complexity. Research on its own is no longer enough to effectively make sense of it.

### Systems Thinking

The concept that began to change our way of thinking is systems. A system is a whole that cannot be divided into independent parts without loss of its essential

properties or functions (Ackoff, 1999). A system is defined by its purpose in the containing system and must be composed of at least two parts. The parts must affect the behavior of the whole and must be interconnected. This concept of “wholeness” and “interdependence amongst the parts” is the driving force behind systems thinking (Jackson, 2003).

At the Curtis Institute of Music the most familiar example of a system is that of a string quartet. The first violin voice (part) affects the music (system). The way the first violinist plays and the way it affects the music depends on the how the second violinist, viola, and cello play. Because of the interdependence of the different voices, each of the four voices loses qualities when separated, and the quartet music has certain qualities that none of its parts do. This is, quite literally, the concept of harmony, which is also used by Ackoff (1981) to describe synergy in systems design. The effectiveness of the quartet music depends on how it functions in the larger containing system, the performance.

Jackson (2003) identifies several different types of systems: physical, such as rivers; biological, such as living organisms; designed, such as automobiles; abstract, such as philosophical systems; social, such as families; and human activity, such as systems to ensure the quality of products. Biological systems are concerned with the adaptation of the inner environment to outer environment, and, if well-adapted, a system is generally considered to achieve its purpose (Simon, 1969). For example, the heart (inner environment) affects the body (outer environment). It pumps blood to the other parts of the body because they continue to each do their part. On the other hand, a designed – or mechanical – system has a purpose, but is not purposeful until it works with a living

system, like people (Jackson, 2003). For example, the typical automobile's purpose is for transportation, however it does not get from point A to point B until a person drives it.

Social systems differ from biological and mechanical systems because the parts are people and groups of people. Human beings as goal-seeking living systems make their own decisions and have their own purposes. The interrelationship of multiple, often competing, purposes is what is described as purposeful, and is what makes social systems' problems so complex (Jackson, 2003). Ackoff (1999) describes the social type as systems and models in which both the parts and the whole are purposeful. In this way, musical performances, like the one described above, can be considered social systems, and the organizations that produce performances, a complex purposeful systems.

Systems thinking emerged in the 1940s and 1950s when the methods of inquiry used in the Machine Age failed to effectively deal with complex biological and social systems. There is no one source of this emerging worldview; however, Ludwig von Bertalanffy's work *General Systems Theory* (1968) was a major contributor. Systems thinking is a formal awareness of the interactions among the parts of a system. When a system is analyzed it is reduced to parts, meaning the whole loses its essential properties. Therefore, understanding systems requires a different pattern of thought (Ackoff, 1999).

Synthesis is about putting things together. It is the exact reverse of the three-step analytic process described earlier. It starts with identifying the containing system of the thing to be explained, and then explaining the properties of the containing whole, and, finally, explain the behavior of the thing to be explained in terms of behavior within its containing whole. Synthesis yields understanding – it enables us to describe why. The

synthetic process complements and precedes the analytic process, which explains “how.” (Ackoff, 1981).

Unlike the reductionist approach, systems thinkers look outward when trying to understand something. The belief that every system is part of some large system is known as expansionism. Expansionism is rooted in the idea that complete understanding of anything is an ideal that can never be achieved. Systems thinkers also believe that the more views we have of something the better we understand it. This concept, known as producer-product, acknowledges the cause-effect relationship, but asserts that one cause is not always sufficient in determining an effect. Relationships are thought to be probabilistic in nature, and not directly determined by prior events, which is known as indeterminism (Ackoff, 1981).

The principles of systems thinking are applicable across many domains including physical and social sciences, engineering and music. In the face of nearly limitless information, increased interconnections, and accelerating pace of change, systems thinking offers an approach to understanding complex problems – problems like global warming, healthcare, or the ones the orchestra industry is experiencing – that have many interacting components, have no local cause. It offers tools and techniques for dealing with complexity and the sensibility for seeing the interconnectedness in living systems. Design is the embodiment of the systems thinking principles.

### Design as a Learning Process

A design is a representation, or plan, of an artifact to be brought to reality. Designs can be conceived visually, spatially, physically, or not. To design refers to the

making of a plan. Designers put things together and bring new things into being, dealing in the process with variables and constraints, some initially known, and some discovered along the way. They juggle variables and reconcile conflicting values, a process in which there are no unique right answers.

Many have considered design in a broad sense, including Herbert Simon (1969) in his influential work, *The Sciences of the Artificial*. He saw designing as instrumental to problem solving, or converting a situation from its actual state to preferred one. In its ideal form, Simon thought of designing as a process of optimization. In comparison, Schön (1976) argues, that instrumental problem solving is secondary to the idea that designing is a kind of making. He prefers John Dewey's conception of design as a process of converting indeterminate situations into determinate situations. Through this process, designers construct and impose a meaning of their own in dealing with complex problem situations. Subsequently designers discover the consequences and implications of their constructions – some unintended – which they appreciate and evaluate. Sometimes the design process leads to a reconstruction of the initial understanding (Schön, 1987).

Musical performance can be considered in Schön's conception as a kind of designing. The score provides the performer with the musical recipe in the form of symbols indicating pitch, dynamics, tempo, articulation, and with explicit instruction of expression such as "largo" or "allegro furioso." Despite these instructions, the performer has a great amount of discretion in the performance. She is free to decide the overarching phrasing of notes, tone quality and, within the broad limits of the score, dynamics, tempo, and the musical ebb and flow, or rubato. These interpretive decisions

are made through the physical manipulation of the instrument, which in the case of singers, is the voice. For example, a violinist uses fingering, bowing, and breath to communicate a sense of the piece in performance.

The musician must also discover the meaning of the piece given to him as a score, frame it by the decisions he makes, and realize it through the physical manipulation of the instrument. She is constantly making decisions while playing the piece and, her in enacted decisions she hears the music as faithful to her intentions, mistakes to be corrected, or something that reveals a surprising revelation that she adopts as the music progresses. A musician's reflective conversation with his materials is the process of reflection-in-action (Schön, 1987). Reflection-in-action is learning by doing, a core value in the Curtis education.

John Dewey (1974) describes this emphasis placed on learning by doing:

(The) recognition of the natural course of development... always sets out with situations which involve learning by doing. Arts and occupation form the initial stage of the curriculum, corresponding as they do to knowing how to go about the accomplishment of ends (p. 364).

Curtis students learn musical traditions along side distinguished professional artists.

Traditions of practice are, in Dewey's terms, the methods and working standards of the calling and initiation into the tradition is the means by which the powers of learners are released and directed.

Musicians are often referred to as performing artists. They make music (artifact) and are, in this sense, designers. The ancient Greeks used the term poetics to refer to the study of making things. Music is one category of things made. Architects make physical objects that occupy space in visual form. Lawyers build cases, arguments, and



agreements. Planners construct spatial plans, policies and systems for the orchestration of contending interests. As makers of these artifacts, all practitioners are design professionals (Schön, 1987).

Music – like architects, law, and planners – is a professional practice. Schön (1987) describes the competence practitioners sometimes display in unique, uncertain, and conflicted situations as “professional artistry.” Furthermore, he suggests that learning in all forms of professional artistry depends on conditions created in conservatories: freedom to learn by doing in a setting relatively low in risk, with access to coaches who initiate students into the traditions of practice to help them see on their own behalf what they need to see most (Schön, 1987).

There are many different approaches to the process of designing, some of which focus on the management of complexity, others on manipulating constraints. For this project, I chose interactive planning and idealized design methodology, which focuses on imaging an ideal to be realized. Those who participate in the idealized design of a system can learn how it can be made to learn to work as desired and why existing systems don't work as desired. Participants also learn how much influence they can exercise over the system of which they are a part and the systems of which they are not part, but with which they interact. They learn how to distinguish between self-imposed and externally imposed constraints and how to relieve and redefine constraints (Ackoff, 1999).

Idealized design is a creative activity that makes possible involvement of all people who have a stake in the system, including both experts and nonexperts. Experts tend to be preoccupied with determining what is wrong with the current system in order to remove deficiencies. However, most innovations in systems come from nonexperts.

Nonexperts may not have a deep knowledge of the system, but they do offer great deal about what they want from it. Involving stakeholders in the design process provides an opportunity for those who care deeply about the system to think deeply about it, share their ideas with others who also care about it, and shape its future. It encourages the exploration of new ideas, facilitating widespread learning and development (Ackoff, 1999). Idealized design, based in systems thinking, offers an approach to expanding the musician's view of their art to include designing the performance experience, not just the music, and to creating an education to support this new mindset.

#### Ackoff's Approaches to Planning

The challenge for this project was to identify a methodology that (1) could inspire transformational change, (2) is based in the learn-by-doing philosophy, and (3) speaks to the non-profit organizational model the success of which is dependent upon a diverse set of perspectives. Russell Ackoff's Interactive Planning and Idealized Design offered the right combination of scientific rigor and creative flexibility.

Ackoff (1981) describes four approaches to planning: reactivism, inactivism, preactivism, and interactivism. Reactivist planning is focused on returning things to how they once were. Because of this past-orientation, reactive planning tends to be deal with problems from a mechanistic point of view. Problems are understood through causal relationships and dealt with separately, not systemically. Hostility toward technology and a hierarchical management style is characteristic of reactivist organizations. The main attraction to this approach is a sense of stability that stems from the preservation of

tradition, a respect for history, and a feeling of continuity; however past solutions don't always effectively deal with new realities (Ackoff, 1981).

The inactivist approach is focused on maintaining the status quo, or keeping things the way they presently are. Inactive managements believe that if nothing is done, then little or nothing will happen. This "hands off" approach results in a lot of effort invested to prevent change and alleviate discomfort problems present. This enables organizations to perform well enough, which is the inactivist's desired end. Committees, conformity, and keeping current are prevalent values in inactive organizations. Because these organizations act cautiously, the limitation of this approach is found in errors of omission – what wasn't done but should have been. Higher education institutions typically fall in this category (Ackoff, 1981).

Preactivism operates on the assumption that the future will be better than either the present or the past. To this end, reactivity management seeks to accelerate change and optimize organizations by forecasting and planning based on those predictions. These organizations are decentralized and tend to be experimental, relying upon quantitative scientific techniques. The preactivist approach is widely adopted in America, however, the problem is when the uncontrollable future inevitably results in unpredictable things, the preactivist system is not prepared to handle that which was not anticipated (Ackoff, 1981).

Firmly rooted in systems thinking, interactivism is the fourth approach to planning. Ackoff (1981) states "interactivists believe the future is largely subject to creation. From this derives the concept of planning as the design of a desirable future and the invention of ways to bring it about" (p. 62). Unlike inactivists who are willing to

satisfice and preactivists who seek to optimize, “interactivists want to do better in the future than the best we are capable of doing now, to idealize” (p. 63).

This approach acknowledges the fact that humans are ideal-seeking and curious by nature by incorporating the three types of ends people pursue (Ackoff, 1981):

- 1) Goals: those ends that we can expect to attain within the period covered by planning.
- 2) Objectives: those ends that we do not expect to attain within the period planned for but which we hope to attain later, and toward which we believe progress is possible within the period planned for.
- 3) Ideas: those ends that are believed to be unattainable but towards which we believe progress is possible during and after the period planned for.

The advantage of interactive planning is that it is the only one of the four approaches that “explicitly addresses itself to increasing individual, organizational, and societal development and improving quality of life” (Ackoff, 1981, p.65).

One characteristic of interactive planning and idealized design is that it requires facilitation by a trained leader. Participants often have a difficult time adopting the design mindset and focus on troubleshooting as opposed to a total systems redesign. Therefore, the process takes a significant investment of time and resources to successfully implement. On the other hand, interactive planning and idealized design is adaptable to the needs of the organization. The process has been used to create transformational change in hundreds of organizations including performance organizations such as the Academy of Vocal Arts (Ackoff, Magidson & Addison, 2006), and has many advantages in the current climate. The methodology offers a bottom-up approach that does not rely upon traditional expert assumptions found in higher education. Instead, idealized design provides participants with the opportunity to create their own future. The process allows for multiple perspectives to be incorporated into the

vision, which fosters empathy and implementation. In addition, the methodology stimulates creativity and out-of-the-box thinking, which can lead to powerful ideas. The results of interactive planning are transferable, and can not only lead individual and organization development and change, but also to new ways of thinking about the nature of an organizational system.

### Transformational Leadership

Ackoff (1999) posits that proper objective of a social system is self-development and development of its stakeholders and development of itself. He describes development as “a process in which an individual increases his ability and desire to satisfy his own desires and those of others” (1981, p. 35). In his view, quality of life as opposed standard of living is the appropriate measure of development, and therefore “development is not a matter of how much one has, but of how much one can do with whatever one has.” (1999, p. 273). Continuous development of a social system requires leadership.

There are many different concepts of leadership and a great deal of ambiguity associated with it. Interactive planning and idealized design is rooted in Ackoff’s (1999) views of leadership:

Leadership consists of guiding, encouraging, and facilitating the pursuit by others of ends using means, both of which they have personally selected or the selection of which they approve. In this formulation, leadership requires an ability to bring the will of followers into consonance with that of the leader so they follow him or her voluntarily, with enthusiasm and dedication (p.283)

In his view, leadership is primarily an aesthetic ability that cannot be taught, however tools and techniques usable in creative work can be. Those tools are inherent in interactive planning and idealized design, and therefore the message is in the medium.

Leadership requires the pursuit of a shared vision. A vision is a picture of a state more desirable than the current reality – an ideal that often can never be attained. Senge's (1990) describes a shared vision as a hologram, or a three-dimensional image, where each individual's view adds to the creation of the whole. A vision involves radical change in the way an organization is conceptualized is a transforming vision, and one who inspires the pursuit of the vision by making it fun and fulfilling is a transformational leader (Ackoff, 1999).

Transformational leaders are driven by ideas. They have the ability to inspire a mobilizing idea, expanding creativity. As a creative act, leadership is about the production of unexpected solutions to complex problems. Leaders are skillful at beating the system, not surrendering to it. They pursue continuous development of self and others, and, to that end, a transformational leader unifies life by integrating work, play, learning and inspiration (Ackoff, 1999).

## CHAPTER 3

### METHODOLOGY

#### Principles of Interactive Planning

The interactive planning and idealized design methodology is based in three principles: the participative principle, the principle of continuity, and the holistic principle.

The participative principle implies that anyone who interacts with the system should be involved in its design. The primary benefit of interactive planning is not necessarily an end product, but rather the development that is fostered through the engagement in a process. Interactive planning enables participants to not only acquire an understanding of the organization, but also the diverse objectives of others, making it possible for them to serve organizational ends more effectively (Ackoff, 1981).

In the implementation of any plan there are events that cannot be foreseen. The principle of continuity posits that planning be continuous. Interactive Planning is a system that allows continuous monitoring, evaluation, and modification (Ackoff, 1981). This operating principle is especially important in determining feedback loops to support Curtis's mission to educate and train.

The holistic principle illustrates the importance of planning simultaneously and interdependently across all levels and all parts of a system. This idea is best described through the combination of the principle of coordination and the principle of integration. The principle of coordination implies that all parts of the system should be planned for simultaneously and interdependently because a threat or an opportunity that appears in one area may best be treated in another. The principle of integration asserts that planning

done independently at any level of a system cannot be as effective as planning carried out interdependently at all levels (Ackoff, 1981).

The approach architectural firm, Venturi, Scott Brown and Associates' applied to the design development of Curtis's Lenfest Hall best illustrates the principles of idealized design. Architects worked across constituencies in order to understand the needs of the organization from multiple viewpoints (participative principle). They checked in with Curtis building project representatives anywhere between once and four times a month to ensure the design met the school's desires; and, if did not, the plans were adjusted accordingly. Throughout design development, the project team also focused on providing enough flexibility in the design to accommodate an unpredictable future of technology (principle of continuity). The firm needed to consider the available footprint of the building, which happened to include the facades two historic brownstones, and the school's space priorities simultaneously (holistic principle) in order to fit the necessary rooms into the whole. These three principles were evident every step of the process because the costs of redesign during construction outweighed the extra time it took to get the design right.

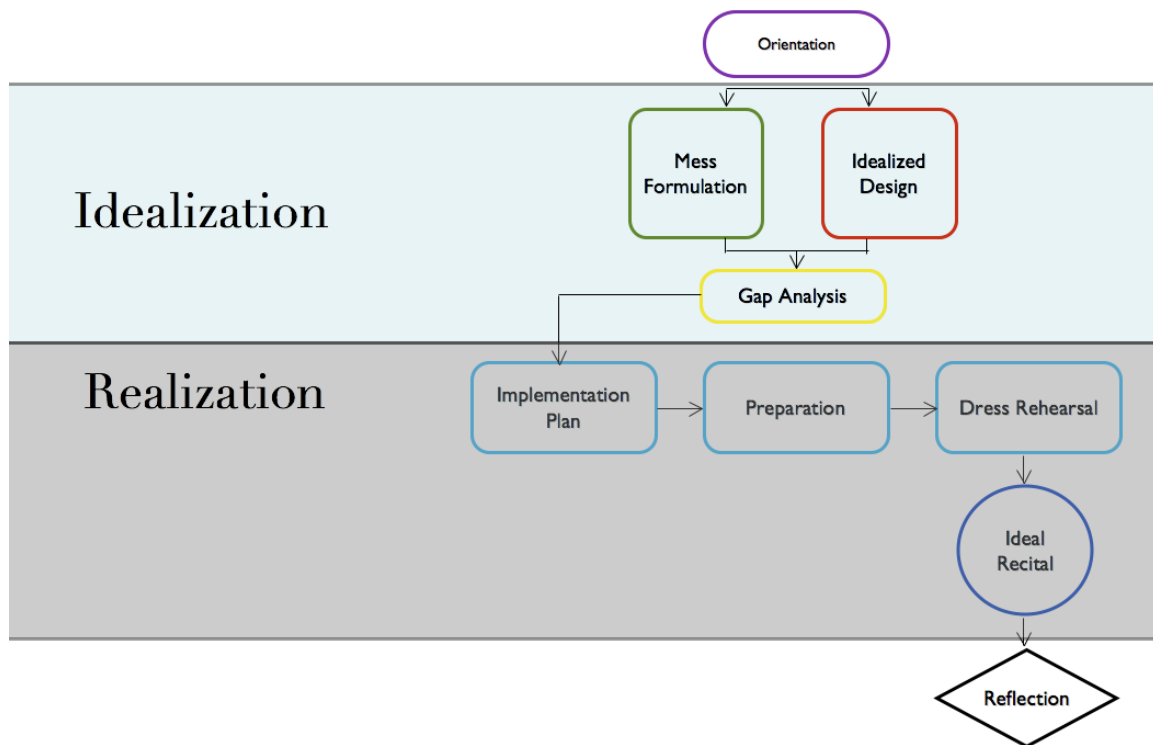
### Idealized Design Steps

The process of interactive planning and idealized design has two phases: idealization and realization (see Figure 1). The idealization phase begins with Mess Formulation. A mess is a term Ackoff (1999) to describe a complex system of problems, or interacting threats and opportunities. The goal of Mess Formulation is to determine how the organization could fail – its Achilles heel – if it were to continue behaving as it



currently behaves and the containing environment remained as expected (Ackoff, Magidson, Addison, 2006).

Figure 1. Interactive Planning at Curtis



A team prepares a systems and obstruction analysis. A systems analysis describes how the system works and interacts with the relative business environment. An obstruction analysis describes the conflicts, customs, or other obstructions that resist or prevent change. The team then prepares reference projections that provide foresight into the system's future. This work is synthesized into a presentation of the organization's possible future if it does not act (Ackoff, Magidson & Addison, 2006).

The second step of the idealization phase is Ends Planning. The purpose of ends planning is to generate design specifications based on the diverse perspectives of the

system's stakeholders. Stakeholders are guided through a creative process where they imagine what the system would be like now if it could be anything they wanted. The stakeholders' specifications are then synthesized, consolidated, and accepted by consensus, to create a vision (Ackoff, 1981). Then, a team designs the idealized system incorporating the stakeholder specifications. The design states how the properties specified are to be obtained. The idealized design of the system is compared with the understanding of the current reality generated during mess formulation. Gaps between the two are identified (Ackoff, Magidson & Addison, 2006).

The realization phase, which includes the remaining four steps, seeks to remove or reduce these gaps. In Means Planning, participants determine what should be done to approximate the idealized design as closely as possible. Means are courses of action, practices, projects, programs, and/or policies selected for implementation that attempt to bring the current state closer to the desired future (Ackoff, Magidson, Addison, 2006).

In Resource Planning, participants identify how much of each resource is required to implement the selected means. Resources may include personnel, money, materials, services, facilities, equipment, knowledge, etc. In this step, planners also determine what resources are available, and what should be done about shortages (or excesses) (Ackoff, Magidson & Addison, 2006).

The final two steps of interactive planning are Design of Implementation and Design of Controls. Planners determine roles and responsibilities – who is to do what and when it should be completed – as well as how to monitor the schedule and assignments and how to adjust for failures (Ackoff, Magidson & Addison, 2006).

### Role of Facilitator

The role of the facilitator in interactive planning and idealized design differs from more traditional methods. Because the process is based in the belief that no one can plan for anyone else, a facilitator's main objective is to encourage participants to plan effectively for themselves. The facilitator must be thoroughly familiar with the process and orient participants to scope of work. Regardless of whether the facilitator is a member of the organization, she must be respected so that she can maintain control of the discussion and guide participants toward consensus (Ackoff, Magidson & Addison, 2006).

The facilitator is responsible for establishing the rules of engagement at the beginning of the process, and ensuring those rules are incorporated every step of the way. Ackoff, Magidson and Addison (2006) suggest facilitators incorporate three ground rules into the process: (1) the system was destroyed last night, (2) equal participation by everyone, and (3) positive contributions only. Inexperienced participants, such as those involved in the Curtis project, often have difficulty with these rules, so the facilitator should repeat these rules as often as necessary in order to support the participants in achieving their goals in the planning process (Ackoff, Magidson & Addison, 2006).

In the idealized design stage, the role of the facilitator is particularly important. She must stimulate, instruct, and even deliberately shock participants to get them unstuck from the current state. She needs to be a good listener, let go of her own opinions and judgments, and be able to "be with" the participant who is speaking (Magidson, 2004). It is preferable that participants synthesize their own work; however, sometimes the situation requires the facilitator to capture aspects of the design in writing. When this is

the case, the output is thoroughly reviewed by the participants. The facilitator should point out omissions, highlight significant differences, and provide examples that provoke further probing of possibilities (Ackoff, 1981).

Throughout the entire interactive planning process, the role of a facilitator mirrors the role of a teacher in a classroom. Like a teacher's lesson plans, the facilitator sets the agenda at the beginning of each step; however, she allows direction to emerge through discussion, adjusting the timeline according to progress. She helps focus assignments to be accomplished between sessions, or homework, which is critical to progress. During sessions, the facilitator encourages participants to leave what exists completely behind, ensures that one person doesn't monopolize the discussion, and guides participants in building on ideas of others as opposed to critiquing them (Ackoff, Magidson & Addison, 2006). The more a facilitator possesses the skills and qualities of a good teacher, the better the design experience is for participants.

## CHAPTER 4

### PREPARING FOR DESIGN

#### Organizing the Process

After it was decided to pilot a project using the interactive planning and idealized design methodology, four members of Curtis's senior staff, including met with the external consultants from the Organizational Dynamics program at the University of Pennsylvania. This initial meeting provided the president, process consulting team, and steering committee with an opportunity to get acquainted with one another and discuss goals. President Roberto Diaz shared his motivation as a desire to prepare to students to enter a turbulent organizational environment and his responsibility to keep classical music relevant in the world. John Mangan, vice president and dean, and David Ludwig, artistic chair of performance studies, shared their desire to create a program that integrates leadership into the curriculum. Through the sharing of goals, participants were able to get familiar with each other's language. The discussion resulted in the following decisions:

- The project would be called the Curtis Leadership Workshop.
- The project focused would be the redesign of a student recital.
- Formal distribution of the knowledge generated from the process.
- The Steering Committee would include John Mangan, David Ludwig, John Pourdehnad, and Tamara Nuzzaci.

Members of the Steering Committee not only held positions of authority to approve new strategic directions and commit resources for successful implementation, but also offered significant artistic, teaching, and management experience to the process. The Steering Committee made time in their schedules for weekly meetings and on the fall

recital series for the ideal recital to be prototyped. This team became responsible for the design of the planning process.

A schedule for the project was proposed in the original PCT meeting (see Table 1). A regular meeting time was established on Wednesday nights from 8-10pm. Without any feedback after the first two organizational meetings, I had to trust that the schedule was manageable. The schedule was adapted as the project and my own learning took shape. After the orientation, I made considerable adjustments to the schedule, which could have had an impact on overall participation.

Table 1. Original Design Planning Schedule

<b>Step</b>	<b>Date</b>	<b>Purpose</b>	<b>Resources</b>
<b>Preparation</b>	Aug 17	Form teams, review schedule, plan mess formulation	PCT, TT
<b>Orientation</b>	Sept 15 – 8pm	Student orientation to design thinking and methodology	TT, CDT
<b>Mess Formulation</b>	Sept 22 – 8pm	Determine how student recital series could fall apart if it continues to exist as it does now	TT, CDT
	Sept 29 – 8pm	Examine the parts (Diversity)	TT, CDT
	Oct 6 – 8pm	Examine the parts (Self/Artist)	TT, CDT
<b>Stakeholder Workshop</b>	Oct 13 - TBD	Meeting to brainstorm and generate ideas	PCT, CDT Stakeholders
<b>Idealized Design</b>	Oct 20	Students design the idealized performance based on workshop specification	TT, CDT
<b>Artistic Planning</b>	Oct 27	Gap Analysis Means Planning Resource Planning Design of Implementation Design of Controls	TT, CDT
<b>Rehearsals</b>	Oct 20-Nov 10		CDT
<b>Performance</b>	Nov 12		PCT, CDT

			Stakeholders
<b>Reflection</b>	Nov 17		TT, CDT

The Steering Committee was central to the selection of project participants. A detailed list of participants is shown in Table 2. Project participants mainly consisted of students and the Steering Committee.

Table 2. Original Design Planning Participants

<b>Team</b>	<b>Code</b>	<b>Name</b>	<b>Org.</b>	<b>Title</b>
Process Consulting Team	PCT	John Pourdehnad, Ph. D.	Penn	Ackoff Center for Advanced Systems Approaches
		Larry Starr, Ph. D.	Penn	Program Director, Organizational Dynamics
		Elizabeth Warshawer	Curtis	Executive Vice President
		Tamara Nuzzaci	Curtis	Program Faculty
Teaching Team (Steering Committee)	TT	John Mangan, Ph. D.	Curtis	Dean
		David Ludwig, Ph. D.	Curtis	Artistic Chair of Performance Studies
		Tamara Nuzzaci	Curtis	Program Faculty
		John Pourdehnad, Ph. D.	Penn	Ackoff Center for Advanced Systems Approaches
Core Design Team	CDT	Teaching Team (see above)		
		Becky Anderson	Curtis	Student - Violin
		Katie Jordan	Curtis	Student - Violin
		Natalie Helm	Curtis	Student - Cello
		Sarah Shafer	Curtis	Student - Voice
		Kelly Coyle	Curtis	Student - Clarinet
		Patrick Kreeger	Curtis	Student - Organ
		Matt Ebisuzaki	Curtis	Student - Trumpet
		Milena Pajaro-van der Stadt	Curtis	Student - Viola
		Camden Shaw	Curtis	Student - Cello
		Joel Link	Curtis	Student - Violin
		Bryan Lee	Curtis	Student - Violin
		Mari Yoshinaga	Curtis	Student - Percussion
		Yekwon Sunwoo	Curtis	Student - Piano
Vinay Parmeswaran	Curtis	Student - Conductor		
Daniel Shapiro	Curtis	Student - Composer		

Student participants were chosen based on leadership potential, age, year, and instrument.

An initial invitation to participate was emailed by the dean to thirteen students. Key

messages in the invitation included:

- You have been handpicked to participate in a special new project because we feel you are among Curtis's most promising artist-leaders.
- The workshop is about the creative process as a foundation of change. It creates an experience in which participants access their own sources of creativity and the diverse experiences and ideas of others, and use that wisdom to transform a performance at Curtis.
- Participants will be encouraged to challenge taken-for-granted assumptions and to start seeing things in a new way. A new perspective allows us to break from the expectations of the familiar and to think boldly about music performance in the 21st century.
- Over the course of 11 weeks, you will work side-by-side with professionals, funders, media partners, and community members to imagine, develop, and deliver the ideal performance experience.
- What will we ask of you? Participate, observe, question, think-big, keep a journal
- What will you take away? A practical toolkit to use to launch performance programs, ideas for your own career and artistic direction, new relationships with influential people in the community and in the industry, skills for how to deal with complex situations

Twelve students accepted the invitation, one declined, one did not respond. After the first two meetings with the students, the string quartet selected and agreed to participate decided to drop out. They cited schedule issues and time constraints as their primary reason for not committing. This seemed to set off a chain reaction, as three other students dropped out shortly after the quartet. One student heard about the project, asked to participate, and remains an active participant. A local alumnus with whom I had a professional relationship, asked to participate, and remains a key player in the process. A third student was invited by the steering committee, attended two sessions, and decided not to participate. In a conversation with one steering committee member, she explained that she found it difficult to jump into the process without an orientation. In the end, we



had good core group comprised of less than ten participants, which is the maximum suggested number (Ackoff, Magidson, Addison, 2006).

Three students from the Organizational Dynamics program expressed interest in observing the process. The schedule only worked for one student, Eric Rabe. He was able to attend and observe the majority of the sessions. His observations are incorporated into this capstone.

### Developing a Mission

Early on, the Process Consulting Team agreed that the intention of the project was not to change the mission of Curtis. Specific goals for the Workshop were never formally and collaboratively outlined; however Curtis representatives were generally on the same page. The PCT agreed on one important focus at the outset of the project – the design was limited to a student recital. A constraint is a limitation on action. Defining and adhering to constraints in a project requires designers to be more creative rather than less, often enabling beauty to emerge (Vandanbosch and Gallagher, 2004). In this case, there were multiple negotiations of the meaning of the project constraints, which is a sign of learning (Wenger, 1998).

I created the draft version of the project mission based on specific feedback provided by Curtis president, Roberto Díaz, in the initial PCT meeting. The first draft read, “Problem: How do we make classical music performances relevant in the 21<sup>st</sup> century?” During a call with the Steering Committee and Dr. Larry Starr to discuss plans regarding the orientation session, the project mission was revised to be, “Challenge: Design the ideal classical music performance in the 21<sup>st</sup> century.” The project mission

was further refined after one student participant challenged the use of the word “classical” to describe our music in the orientation session. The ultimate version of the project mission, which served to focus participants in the stakeholder workshop and throughout the design process reads: “Challenge: Design the ideal student recital in the 21<sup>st</sup> century.” With the constraints in place, the entity over which participants has, or has access to, control is clear.

### Learning Space

Learning space plays an important role in design projects. Tim Brown (2009) posits that “a well-curated project space, augmented by a project Web site or wiki to help keep team members in touch when out in the field, can significantly improve productivity of a team by supporting better collaboration.” (p. 35). He goes on to suggest that a physical space for a design project should be large enough to accommodate the accumulated research materials so they can be out and available all the time as opposed to hidden away in documents, PowerPoint’s, and notebooks (2009).

Physical space has always been a challenge for Curtis. Workshop sessions have been held in a variety of locations, including Room 235J (the computer lab), Field Concert Hall, and the Bok Room at Curtis and the Kade Center at the University of Pennsylvania. Ackoff, Magidson, and Addison (2006) suggest the meeting space be able to accommodate a number of circular tables or a U-shape configuration of tables. We were able to accommodate the recommended layout on two occasions. Each space has more or less desirable aesthetics, but more importantly, different and inconsistent access

to technology, which prevented project research from being displayed physically, and sometimes, even electronically.

The Curtis Leadership Workshop has a virtual project center to support the participants through the interactive planning process, [TThttps://sites.google.com/site/curtisleadershipworkshop/home](https://sites.google.com/site/curtisleadershipworkshop/home). Figure 2 shows the homepage navigation. The workshop website is complete with a social computing platform, designed with hopes to generate thoughtful interaction amongst users. There are three main parts to the navigation: work space, participants, and resources. The work space area includes information on the theory, project scope, schedule, project work, and collaborative spaces for both the mess team and design team to share ideas. The participant area includes bios and other personal and professional information about all the participants involved in the design process. The resources area of the site houses quotes, links, and workshop documents (presentations, handouts, and data). The content and structure of the website is intended to create a shared knowledge base for participants.

Figure 2. Website Homepage Navigation

The screenshot shows the homepage of the Curtis Leadership Workshop. At the top, the title "Curtis Leadership Workshop" is displayed next to a search bar. The left sidebar contains a "Learning Space" menu with links to Home, About, Systems Thinking, Project Brief, Project Work, Mess Log, and Idea Log. Below this is a countdown timer for "10 days until The Ideal Recital". Further down are "Our People" and "Resources" sections. The main content area features a banner image of various musical instruments (violin, viola, cello, double bass, and tuba) and a "Project News Feed" section with a post titled "Session 3 - Stakeholders" and another titled "Call for Change (Mess Team)".

Willingness to use site as a source of new knowledge is a characteristic of a successful virtual community of practice (Ardichvili, Page & Wentling, 2003) Emails to the site administrator served as evidence that students accessed resources made available on the site to complete assignments; however the social aspects of the website did not catch on. The site required students to be logged into Gmail in order to use the collaborative tools.

### Orientation

The orientation session began with the question, “What draws you to this workshop?” The answers captured on the flipchart read:

- Ensuring the future exposure of quality classical music to enrich peoples’ lives
- Discussing ideas to share with each other (musicians)
- A need to produce art beyond financial goals; to make art feel rewarding and meaningful
- Understanding the entire concept of a performance

- Helping to realize the same connections between players on stage for audience members
- Keeping music real
- Merging audience and performers: fixing the apparent disconnect
- Collaborating to explore and evaluate our situation

Participants were then presented with an orientation to systems thinking and interactive planning. The project challenge was discussed (which, as mentioned above, resulted in a revision) and a demonstration of website was given. In closing, participants volunteered to be on either the Mess Team or the Core Design Team. Originally, the terms “detectives” and “designers” emerged from discussion as team names, but the process consultant suggested that the word “detective” implied that something was wrong with the current system, which was not the impression the Steering Committee wanted to give participants. The decision was made to stick with the formal term, “mess.”

### Summary

Based on my experience preparing for the interactive planning and idealized design process at Curtis, I found that having support from the leadership is key to project success. I observed how meeting time and aesthetics of the meeting space impact productivity. Participants use a virtual learning space primarily for storing research and resources, not for collaboration. In addition, a website log-in discourage participants from using the collaborative tools available in the virtual learning space. Orientation to and reinforcement of systems thinking principles is a critical condition to design planning.

My observations lead me to believe the following six recommendations would benefit the design process:

1. Develop clear goals from the outset of the planning process.
2. Allow at least one year for design and build flexibility in the timeline from the outset.
3. Set clear expectations of the required time commitment.
4. Dedicate a classroom in Lenfest Hall to be a performance design center so that materials so that participants can engage with the information between sessions.
5. Create a virtual learning space with simple document and resource management tools. Collaborative tools could be limited to a wiki. Enable participants to create the virtual space as they see fit.
6. Build a searchable archive all ideas so that future project iterations can build off of past learning.

Creating a manageable schedule for participants was my greatest challenge. As a first-time facilitator of the process, I had to improvise as I discovered how much time was needed for each step in the process based the participants' ability and available time. I resisted asking questions of my professors, the consultants, because I sensed they, as systems thinkers, wanted my personal learning in the process to emerge dynamically, like the schedule did. The result was that I went into the project with an unrealistic deadline that was primarily driven by my own personal goals for completing this paper. Since then, we adjusted the project timeline to extend well beyond my original goal. I learned that design processes require a significant dedication of time resources and yield unpredictable timelines. All participants should be made aware of the required commitment and expectations at the outset of the process.

## CHAPTER 5

### MESS FORMULATION

#### Participants

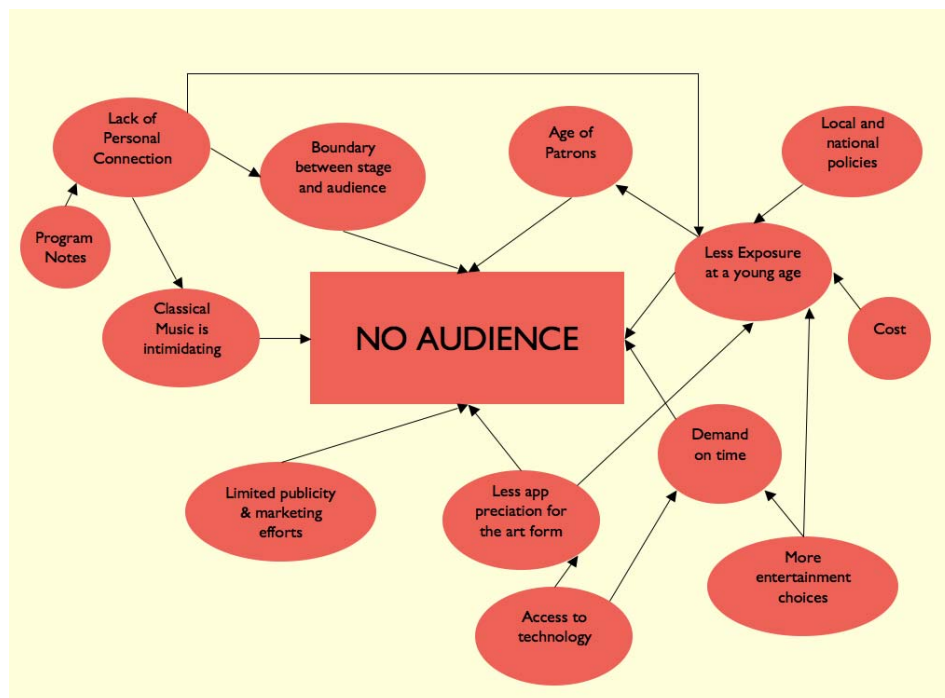
The goal of mess formulation is to gain relatively complete knowledge and understanding of where the system currently is, where it heading if it doesn't change its behavior, and the obstructions to its changing. To that end, it is recommended that the mess-formulating team should consist of three to five people who are high-performers and who have been with the organization fewer than five years. Generally, this demographic is less inhibited and more likely to think critically about the current state of the organization. Furthermore, mess formulation provides team members with a good organization education (Ackoff, 1999).

Curtis's mess team consisted of five of the brightest, most dedicated students in the school and the dean. Each team member volunteered for the work in the design planning orientation session and all had been affiliated with the organization for less than five years. Even though I preferred to remain peripheral to the process, I assisted the mess team with the data collection because it became apparent that an operational expert with industry experience was necessary to point team members to resources in the school and in the field. Typically, in a large-scale interactive planning process, members of the mess team dedicate half their time to the process and the other half to normal work (Ackoff, Magidson, and Addison, 2006). In Curtis's case, the planning process was extracurricular and had to be accomplished on top of normal work. Attendance at meetings was inconsistent; however the commitment in terms of time and energy was far better in comparison to the design team.

### Formulating the Mess

The mess team began work before the design team. In first session, the facilitator, Dr. Pourdehnad, posed the question “what would the future of student recitals be if the Curtis were to continue to do exactly what it was doing and the environment was exactly “What it was expected to be?” It was suggested that there would be no audience at recitals if things remained the same. Each team member had an opportunity to reflect on this idea. Then the team agreed that this would be the Achilles heel of the student recital series. A good deal of discussion led to the identification of several reasons why the team thought the audience is dwindling, including an aging audience, less exposure at a young age and greater demand with more entertainment choices. The facilitator captured the comments in an influence diagram on the whiteboard (see Figure 3). At the conclusion of the first mess formulation session, the team agreed to research the properties to support the hypothesis.

Figure 3. Student Recital Influence Map





The mess team divided into three groups for research: one began finding resources to support the hypothesis, another attempted to add to and refine our "No Audience" map, and the third began to search for cultural practices that were obstructions to change. I prepared information and process flow charts. Team members were encouraged talk to staff members and fellow students in order to test the validity the hypothesis. As Ackoff, Magidson, and Addison (2006) recommend, the mess team was given access to any data or information it required.

It became apparent that there was a lack of available data that directly related to student recitals at Curtis. For example, the communications office only had three years of attendance counts, and based on one team member's analysis, we did not see a significant decline in patron numbers. No data was found that provided insight into the audience's demographics or quality of experience. The team's inclination was to survey the student recital audience to gather data, but, at the time, the series had not yet begun. Since tickets aren't purchased for the recital series, Curtis does not keep track of patron information, eliminating the possibility of an email or mail survey. To counteract the lack of available data about audience trends at Curtis, the mess team interviewed key staff members and used proxy measures based on general audience demographics and participation data in the Philadelphia area to support their hypothesis.

The mess team identified characteristics such as conflicts, customs, or values of Curtis and student recitals that resist change. The following obstructions were presented by Katie Jordan and discussed with the team: (1) demand on time, (2) faculty value with traditional repertoire and presentation, (3) formal recital venue aesthetics and routine

presentation, (4) current audience profile, (5) high standard of quality value, (6) change is not valued – a conservatory’s purpose is to preserve the past, and (7) student interest.

The team worked independently and then pulled together a PowerPoint presentation to share their compelling case for change (Appendix B). Although it was a very good effort by the students, the presentation exposed the effects time and resource limitations. The students did not use a creative format to present the scenario of a possible future, but instead they prepared a list of facts and loosely related them to the recital. After observing the presentation, Organizational Dynamics student, Eric Rabe, observed, “gathered data but not sure what it all means.” The mess presentation was not able to confirm or negate the student’s hypothesis.

The results of the presentation uncovered the fact that the recital system is not built in a way to provide the feedback necessary for learning and adaptation. This is evidenced by the lack of available data directly related to the system. Ackoff (1999) describes a complete learning system as “one that detects error, diagnoses them, and prescribes corrective action and these activities require information, knowledge, and understanding” (p. 164). At best, the student recitals have single loop feedback capability insofar as audience members, which sometimes include faculty members and fellow students, have informal discussions about the musical experience with performers and staff after the performance. However, there are no formal feedback loops in place, and therefore threats and opportunities are not easily be detected. The recital system is lucky because the containing system (Curtis) has remained relatively predictable.

## Summary

Through my experience facilitating and participating in mess formulation, I observed that students had difficulty connecting research to the hypothesis. Time constraints played a role in the team's ability to produce a coherent and creative presentation of the mess. The mess presentation didn't seem to convince participants that change was necessary. At first I believed this was because the lack of Curtis-specific data prevented the team from determining the seed of destruction. In the end, I realized that the lack of data itself the major weakness of the student recital system.

My research and observations lead me to believe the following seven recommendations would have a positive impact on Curtis's next design process:

1. Extend the time allowed for mess formulation.
2. Conduct mess formulation while student recitals are taking place to provide an opportunity for the team to collect data from the audience.
3. Invite requisite professionals to enrich discussion and research of hypothesis.
4. Create more personalized instruction relationships to help students find and sort through available data and relate it back to the hypothesis.
5. Include a member of the marketing department in discussion about audience.
6. Create a resource center of marketing ideas with which students can access throughout the design process.
7. Create more physical learning tools, like worksheets, resource materials, etc.

I was reminded that process is time bound and this must be respected if quality results are desired.

## CHAPTER 6

### IDEALIZED DESIGN

#### Concept Generators

The group that generated concepts of the recital experience was known as the design team. Ackoff, Magidson and Addison (2006) suggest that the design team should be a group of people different from the mess team, and comprised of between three and five individuals. These people are responsible for redesigning the all properties of a recital should have the power to make it happen. The Steering Committee should empower the design team with the authority to make key decisions. Ideally, team members should be creative thinkers who have the ability to imagine wholly new ways to design the performance experience.

Seven students and the artistic chair of performance studies volunteered for the design team in the initial orientation. By the third session, all seven dropped out of the process for one reason or another. Four students who were also members of the Old City String Quartet decided the opportunity was not worth the investment of time considering their other activities. One student could not make the stakeholder workshop, and then, after the next session, she, too, decided the opportunity was not worth the time investment. One student found a replacement who had more time to dedicate to the workshop activities. One student, despite attending the stakeholder workshop, just stopped showing up to sessions without explanation. As a result, the design team did not end up with one member who attended the initial orientation meeting.

In the end, the design team consisted of one student representative and one alumnus we managed to recruit. Neither of these participants received a proper

orientation to systems thinking or the idealized design process. The faculty representative and I ended up doing most of the work on behalf of the team.

### Stakeholders

A stakeholder is any person, group, or organization that can place a claim on the organization's resources, attention, or output or is affected by its output (Bryson, 2004). Twenty-one stakeholders representing the diverse objectives in Curtis recitals gathered to help student imagine the ideal recital. Table 3 shows a full of participants.

Table 3. Idealized Design Session Participants

<b>Name</b>	<b>Affiliation</b>	<b>Title</b>
Joseph Conyers	The Philadelphia Orchestra	Assistant Principal Bass
Stanford Thompson	Curtis Institute of Music	Alumni
Jeri Johnson	Black Pearl Orchestra	Conductor
Alison Tyler	The Franklin Institute	Traveling Science Educator
John McFadden	Curtis Institute of Music	Board of Trustees
Mary Loiselle	Curtis Institute of Music	Director, Career Services and Community Engagement
Christopher Amos	Carnegie Hall	Director, Education Media & Technology
Susan Goldberg	Member	Pennsylvania Council on the Arts
Bruce Warren	WXPB	Program Director and on-Air Host
Matthew Barker	Curtis Institute of Music	Manager of Student Recitals
Paul Arnold	Curtis Institute of Music	Violin, Board of Overseers
Lisa Liem	Curtis Institute of Music	Parent, Board of Trustees
Michael Cone	Audience Member	POA Board
Camden Shaw	Curtis Institute of Music	Cello
Milena Pajaro-van de Stadt	Curtis Institute of Music	Viola
Alexandra von der Embse	Curtis Institute of Music	Oboe

Eric Rabe	Organizational Dynamics	Observer
John Mangan	Curtis Institute of Music	Dean
Natalie Helm	Curtis Institute of Music	Cello
Joshua Gersen	Curtis Institute of Music	Alum
Patrick Kreeger	Curtis Institute of Music	Organ
David Ludwig	Curtis Institute of Music	Faculty
Mari Yoshinaga	Curtis Institute of Music	Percussion
Tamara Nuzzaci	Curtis Institute of Music	Observer
Larry Starr	University of Pennsylvania	Facilitator
John Pourdehnad	University of Pennsylvania	Facilitator
Jason Magidson	Wildfire Commerce Consulting	Facilitator

The internal stakeholders included faculty, students, and staff member. Alumni and members of both the board of trustees and board of overseers participated. External stakeholders included media partners, representative from area arts and culture organizations, and audience members some of which had never experienced a Curtis recital, other loyal attendees. Many of the participants in the stakeholder workshop filled multiple roles - they were audience members and trustees or alumni and professional organization representatives.

#### Facilitators and Observers

The effectiveness of idealized design is greatly increased with the assistance provided by experienced facilitators (Ackoff, Magidson, Addison, 2006) and observers (Magidson, 2004). Curtis's stakeholder workshop benefited from three professional facilitators, Dr. Larry Starr, Dr. Jason Magidson, and Dr. John Pourdehnad. Each facilitator is a professor at the University of Pennsylvania, and a seasoned practitioner. The mess team was invited to attend as scribes and observers. Eric Rabe, a student in the Organizational Dynamics program, observed as well. Magidson (2004) suggests

enabling as many people as possible to experience the design session live and doing so lessens the need for actual participants to go back and “sell” the results to others.

### Concept Implementers

After the gap analysis, the design team (concept generators) joined together with the mess team to form the group of people that began the iterative development of the design. This group is called the concept implementers or core design team. A list of participants with which Curtis’s core design team started off is shown in Table 4. There are three criteria to consider when selecting participants on the core design team: (1) each participant should bring either a skill, knowledge, or the ability to lead; (2) participants should embrace the philosophy of continuing to engage stakeholders; (3) there is involvement by the key organizational functions that will enable the design eventual implementation (Magidson, 2004). Through the process of iteratively fleshing out the design, Curtis’s core design team should be supplemented as necessary with the requisite minds required to approximate the ideal design as close as possible. Experts enrich the process and provide the ability to meet the desire.

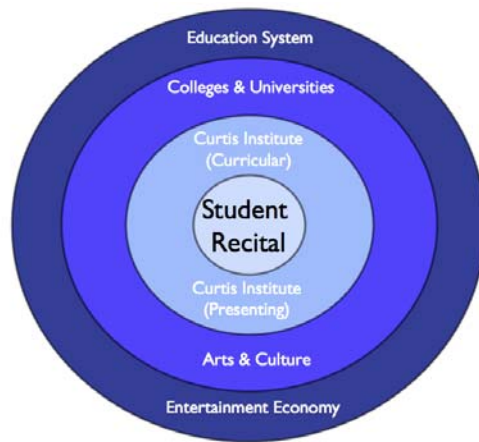
Table 4. Core Design Team Participants

<b>Name</b>	<b>Role</b>	<b>Mess/Design</b>	<b>Original List</b>
John Mangan, Ph.D.	Dean	Mess Team	Yes
David Ludwig, Ph.D.	Faculty	Design Team	Yes
Tamara Nuzzaci	Facilitator		Yes
Katie Jordan	Student	Mess Team	Yes
Becky Anderson	Student	Mess Team	Yes
Vinay Parmeswaran	Student	Mess Team	Yes
Daniel Shapiro	Student	Mess Team	Yes
Patrick Kreeger	Student	Mess Team	Yes
Natalie Helm	Student	Mess Team	Yes
Alexandra von der Embse	Student	Design Team	No
Joshua Gersen	Alumnus	Design Team	No

### Generating Stakeholder Specifications

Curtis's first step in the idealized design process was to generate stakeholder specifications for the ideal student recital. Before the stakeholder meeting, the design team and the mess team reviewed a diagram of student recital as a system (Figure 4) and discussed the concept of internal and external stakeholders.

Figure 4. A Systemic View of Curtis Student Recitals



After a good deal of discussion about stakeholders and what the term means, students were given bios of key stakeholders and asked to complete a worksheet to show the criteria that a particular stakeholder might use to assess a recital. Quality of performance was essentially universal as a value. The students seemed engaged.

The stakeholder meeting – which is often referred to as an idealized design session – was hosted by the University of Pennsylvania on the afternoon of Saturday, October 2, 2010. After the dean welcomed stakeholders and provided a brief explanation of the workshop initiative, the following key messages were presented:

- The goal is to imagine the ideal student recital at Curtis.
- It was explicitly stated that the mission of Curtis's remains.



- Three approaches to creating we described: the narrative approach which is based on past personal experience, the research approach in which one engages in scientific analyzation, or the design approach which requires abandoning all thinking about how “recitals have always been done.”
- In this session we use the design approach in which we imagine that “the system was destroyed last night.” (Ackoff, 1981)
- Discussion should be about the entire recital experience – including security, program notes, comfort, lighting, etc. – not just limited to the recital itself.
- Because there is no one best way, we gather various key stakeholders for views.
- The rules for engagement were posted: one conversation at a time, stay focused on the task, encourage wild ideas, go for quantity, be visual, defer judgment, and build on the ideas of others (Brown, 2009)

In order to shift participants into wish mode and create the right environment for idea generation, Magidson (2004) recommends telling participants not to focus on what is not wanted and to remain in listen-only mode while others are speaking in addition to many of the same messages listed above.

The stakeholders were divided into three groups – blue, green and yellow – each led by a Penn facilitator. In small groups the facilitators restated the purpose, to imagine the ideal recital – one they, and anyone they tell about it, would be compelled is to attend. Each group was asked to capture as many ideas as possible on flip charts. The green group chose to use a computer instead. I provided facilitators with a list of probing questions to stimulate conversation if a group got stuck (see Appendix C).

Each group posted their list of ideas, or recital design specifications. The green team attempted to rewrite their ideas on flipchart paper, but they were unable to capture everything in the facilitator’s computer notes. The typed notes were posted, but the small print made the ideas more difficult to read. As a result, the ideas translated on the flipcharts received more votes than the ideas on the word documents. Each group presented their ideas for the ideal recital. Stakeholders were given stickers the color of

which coordinated with their group to vote on the ideas they felt were most compelling. This set the specifications for the design team's redesign.

### Five Major Thrusts

In the next session, the design team reflected on the stakeholder meeting. Of the three students who were present for the idealized design, one expected the stakeholders to be much more extreme in their creativity. He observed that a member of his breakout group began by describing what he thought was wrong with recitals today. It was suggested that this contribution could have led to his group's more practical properties.

The synthesis of all the ideas collected in the stakeholders' workshop emerged dynamically from the group's interaction. The flipcharts and word documents captured from the stakeholder workshop were posted on the classroom wall. The design team created a working document to record the ideas that received participants' votes. The team called these the top ideas. The top ideas were listed by number of votes received. (See Appendix E). The team visually scanned the flip chart lists and noted words that frequently appeared. An electronic document containing all the ideas captured on both the flip chart lists and the green team's document was opened and named All Ideas. The team used the find tool to count how many times each noted word appeared throughout. (See Appendix D). It was agreed that we would use an image to convey these common words found throughout the stakeholder ideas (Figure 5). The design team used the "find" tool to search for the thirteen (13) words that appeared five (5) or more times in the All Ideas document in the top ideas (Figure 6). The top ideas with the common words



each category are shown in Table 5.

Table 5. Stakeholder Specifications as Five Major Thrusts

Category	Idea	Votes
Audience	Making a connection with the audience that acknowledges a personal relevance – why does this matter to me?	4
	Dynamic audience interaction create opportunities for discussion throughout	4
	Emotionally engaging for performer <u>and</u> audience	3
	No separation between audience/performer	2
Experience	Comfortable atmosphere: chairs, food, wine (engaging all 5 senses)	6
	External/non-musical elements support the musical experience	3
	Very social experience	2
	Ease social expectations	2
	Curtis app used during the recital context-interactive program notes	2
	“Fun” experience	1
	Create opportunities for discussion throughout	1
Values	<u>Conviction</u> -> based on training, education, and values	4
	Concerts embody and encourage highest musical standards	1
Program	Each recital is an individual creative process, not a fixed model	8
	Programming that inspires curiosity and continued engagement	6
	Program for the highest common denominator	3
	Use recitals to develop students’ ability to program	3
	Knowing what the piece means to the performer – something personal	3
	Program or idea driven	2
Connect	Using music to connect cultures, genres, ideas, people	3
	Incorporation of other arts must be connected	1

The Delphi method <sup>ii</sup> was used to engage the stakeholders in a second review of the design team’s synthesis. A presentation of the synthesis process and resulting thrusts (Appendix F) was sent to the stakeholders. No additional ideas were contributed upon their review of the materials and thus the five thrusts and corresponding specifications were accepted by consensus.

The stakeholder specifications were presented by the design team on the same evening as the mess presentation. There was a good deal of discussion about creating a whole out of pieces that don't seem to go together. John Pourdehnad encouraged the

participants not to think about either/or, but rather this and that. The group comes around to the idea that thrusts are the gaps that need to be closed. The mess team and the design team combine to continue work of the recital design properties due to participation issues. Organizational Dynamics student, Eric Rabe, makes the following observations about the presentation and gap analysis:

- Fatigue setting in.
- Alumnus participant explains after the meeting that he is frustrated by what he sees as a pointlessness to the project. “It seems as though we just swirl around and around and nothing is really happening.”
- Another student participant is not sure this will work.

### Summary

Through my experience in the first steps of idealized design, I observed that Curtis’s stakeholders, including faculty, were incredibly eager and excited to participate in the design, despite the relatively short notice and significant time investment. Of the seven faculty members contacted, all had scheduling conflicts, but want to participate in future iterations of the project. In my opinion, participation in the stakeholder meeting was very good and it yielded quality results. The resulting design specifications will serve as a powerful tool throughout the design. The opportunity to engage in the recital design process strengthened the web of support for the students, the project, and the school. In fact, one board member used the project as way to a prospective trustee who happily accepted the invitation to participate. The stakeholders’ common passion for classical music performance and preserving its future seems to contribute to the high level of commitment. Engaging students in the design process proved more challenging. Based on my observations, I believe the incentive was not great enough to warrant the required time commitment on top of other responsibilities.

My research and observations lead me to believe the following three recommendations would prove beneficial:

1. Identify and provide a greater incentive to participate. For example, provide the experience as an elective course for credit, or provide a “design” stipend that students can use for approved expenses in rethinking their performances, and especially graduation recitals. Or, invent a way to incorporate the student and their artist-teacher in the process.
2. Find ways to engage stakeholders throughout the next steps in the process to build on their energy and commitment to the process.
3. Incorporate one-on-one stakeholder interviews early on in the process

Through this project I became aware of my tendency to download information when presenting, which is not effective, and will work on avoiding this in future presentations. Recognizing that inexperienced participants need more guidance, I will take a more active role in reminding students of the ground rules in order to help free their thinking through the design process. Our next step is to achieve consensus on a recital design and begin to formulate an implementation plan.

## CHAPTER 7

### CONCLUSION

#### Next Steps

With the document that categorizes the stakeholder specifications complete, the next step in the process is to begin the iterative development of the recital design. After the initial blueprint is drafted by the core design team (Table 4), members should decide whether or not they want to continue to participate in the project. Desire to participate is a key element in design. The project could be opened up at this point to any student who wishes to participate. In addition, members should choose the functional area of the recital they want to implement, be it the program, audience development, operations, technology, or other design element. The team should then be supplemented with the appropriate requisite minds and resources to realize the design. Students who desire to continue should be partnered with professional experts in the functional area they choose to pursue. One person should be clearly designated as the leader of this new group of people who carry out the development and implementation of the design.

The initial draft blueprint of the recital design development (Appendix G) should continue to be developed through several iterations of additions, refinements, enhancements, and deletions in order to be sufficiently fleshed out by the new group of participants. Visual representations accompanied by a textual requirements document will help generate clarity and consensus on the design. During this development phase, the design should be shared with stakeholder focus groups that review and provide feedback to enhance the design (Magidson, 2004). The membership of focus groups would depend on the make-up of the new core design team. Resource planning, design

of implementation, and the design of controls will flow from the gradual development of the design. All participants in the process should be invited to the prototype of the redesigned recital.

In a bounded design such as the one currently being created it is assumed that the containing environment, which in this case was the school, remains as it was. Bounded idealized design is subject to three constraints: (1) it must be technologically feasible (no science fiction), (2) it must be capable of surviving in the current environment, and (3) it must be capable of being improved continuously. Because an idealized design must be capable of continuous improvement, it is not an ideal system, but the best ideal-seeking system that planners can conceive now. It is desirable to prepare an unbounded idealized design of the student recital system once the bounded design is complete. This may include performing a redesign of the entire recital series, including the communications, distribution methods, administrative processes and services, curriculum requirements, financial structure, and other internal functions. Unbounded design provides designers with the opportunity to make changes to the containing system so long as they improve performance of the system (Ackoff, 1999).

A short-term and long-term review of the design project should be conducted. Based on my discoveries through the process to date, I recommend a qualitative research approach that extracts the important lessons learned from student, steering committee, process committee, stakeholder, and audience participation in the project. Methods of data collection should include questionnaires and participant interviews with a neutral party, which could be an organizational dynamics student. The short-term evaluation should take place immediately after the prototype recital of all involved. A long-term



assessment of student learning may be appropriate five years from now after student participants enter the professional world.

### Emerging Themes

Ackoff (1999) believes that learning begins with questions we cannot answer and ends with questions we can. This capstone captures a detailed, but partial record of the application of interactive planning and idealized design to student recitals at the Curtis Institute of Music. Because the process has not yet finished, it is too early to even begin to draw inferences from the application; however, in my opinion, hypotheses are beginning to emerge which can be compared with the lessons learned by others from other applications of interactive planning and idealized design. Based on my experience so far, I believe three research questions are emerging: (1) a recognition and readiness to change is a critical condition for good design; (2) the process requires time, incentive, and trust to yield quality results; and (3) the greater the participation in the process, the greater the learning.

### Recognition and Readiness to Change

The extraordinary commitment that both the leadership and the stakeholders demonstrated for the project is rooted in their belief that something about the current system needed to change. Most everyone in these groups has working experience in professional performing arts organizations and has been exposed to the unpredictable nature of the current environment. Hence they were ready to fully engage in the process. On the other hand, based on my conversations with student participants who have not yet been exposed to professional life, the students did not seem to recognize a need to change

and therefore they were not completely ready to engage in design process. It is possible that this was a contributing factor in the initial decline of student participation in the process.

My observations lead me to believe that the effectiveness of a redesign depends on whether the majority of participants recognize a need for change and are ready to do something about it. Because idealized design requires moving from the current to a desired state, it is not only about problem management, but also about change management. This means that readiness and transition are part of the problem. The facilitator can assess readiness to transition by asking explicit questions in interviews or looking for the answers to those questions in talking with people and reviewing communication regarding the design project. Bridges (2003) suggests that fifteen questions, such as “Is there a widespread sense that change is necessary?” and “Is the level of trust in the leadership adequate?” (p. 143). The assessment can be conducted in preparation for or through the course of the process. The facilitator should involve as wide a set of sources as possible in order to gauge whether a change project will be perceived as worth the trouble it causes as well as the degree to which leadership and others understand what is required (Bridges, 2003).

### Time, Incentive, and Trust

Creating a manageable schedule and adjusting it along the way was a challenge from the beginning. The meeting schedule was conceived to fit the traditional course model. Participants were asked to meet once a week for two hours. The only time available in the school schedule when facilitators were also available was Wednesday

from eight o'clock to ten o'clock at night. As Eric Rabe observed, this time did not lend itself to the creative work. Participants seemed mentally exhausted. In addition the first two meetings were held in room 235J at Curtis because access to the internet and projector was not available in spaces that were more aesthetically pleasing. It was hot, stuffy, and crowded in 235J, which possibly affected contributions. An environment where time constraints and physical space motivate commitment are critical conditions for good design.

In this application of interactive planning and idealized design, most participants were asked to dedicate time on top of their normal responsibilities. While they did volunteer, some said that they were motivated by the quality of their peers who were also invited. Time must be carved out of participant schedules and responsibilities to participate in the process (Ackoff, 1999). Furthermore, Schön (1987) posits that the expected rewards must be greater than the cost of commitment to create the conditions in which students involved in a design process to risk their sense of competence, control, and confidence in order to learn. The paradox of learning to design is this: the student does not understand what she needs to learn, can learn it only by educating herself, and can herself only begin to do what she does not yet understand (Schön, 1987). Therefore, the incentive must be great enough to encourage the participants to engage in design.

Due to scheduling reasons, major performance faculty, including the president, could not attend design sessions despite their interest. In one conversation, a student asked why Roberto or other major faculty had not been part of the process. She seemed weary of changing the recital experience without their input even though the leadership empowered the design team to make decisions. Building the process on established

coach-student relationships will help not only help foster new learning relationships, but also build trust in the process, encouraging participants to “take the plunge.”

### Participation and Learning

The outcome of Curtis’s stakeholder meeting – the specifications – is very valuable. It will be useful throughout the iterative development of the design and could be used to inform other decisions about performance activities at the school. The meeting involved the largest group of people. The sheer number of participants on top of the stakeholders’ enthusiasm and common passion for classical music performance seemed to impact the quality of the design and the learning that took place in its development. Similarly, the Academy of Vocal Arts application, it was found that the best way to ensure that a design will serve the organization’s purpose is to include as many stakeholders as feasible in formulating that design (Ackoff, Magidson, Addison, 2006). An emergent hypothesis is the greater the participation in the process, the greater the learning.

Committed participation, however, is not enough to guarantee learning. The Curtis project was originally conceived with the core design team consisting of primarily students. Of the thirteen outstanding students invited to participate, only five remain engaged. Even among the five remaining students, attendance is inconsistent. In addition to Curtis’s dedicated leadership, participants need a nurturing environment and a means of communicating across boundaries. An effective facilitator can do a great deal to create this environment, however, the facilitator is only as good as the participants capacity to integrate the ideas and skills that generate success (Ackoff, Magidson, Addison, 2006). Regrouping the core design team to include the students who truly want to be a part of

the process and the requisite minds necessary for redesign will provide the desire and the ability necessary for successful implementation.

### Conclusion

Facilitating this design project is similar to my experience facilitating the hiring process for The Philadelphia Orchestra. Because the hiring process requires a great deal of time, only one or two of fifteen audition committee members are dedicated to reviewing every single resume and listening to every single audition. Those who do are usually the people “in the back of the section” who are not contractually obligated to be present, but who have a strong desire to shape the artistic direction of the ensemble. Auditions with the most favorable outcomes were not only due to consistent participation, but also the committee’s trust in the leadership, the process, and me – the facilitator.

It took more than one audition for me to gain the trust of The Philadelphia Orchestra and for me to trust the process. I needed to experience the process to understand the intention of each step. Before for every new audition, I had an idea of how to refine my approach, but I also gave myself room to absorb the dynamics of the committee and tailor my approach accordingly. In fact, I reveled in this improvisational dance. Similarly, I trust the process of interactive planning and idealized design more now that I understand it through experience.

As a student in this design process, I was willing and able to suspend my disbelief in order to understand the role of a facilitator. My sense of risk was heightened, and at times, I felt confidence, competence, and control sliding. I became dependent on

my instructor, which caused me great anxiety. I, like the remaining Curtis students, am willing to commit to my own personal mastery, and personal development is a matter of choice (Senge, 1990). By continuing to trust the process, I will not only make more of the moment-by-moment appreciations of the process, but also serve a better role model for participants.

The message of the Curtis Leadership Workshop is the medium. Although much of our work involved focusing on an end product, the learning derived from the process of developing the design. I believe that Curtis's leadership was transformational through this project, both serving as a model for and enabling participants to "beat the system." For me the experience of leading the workshop increased my ability to generate and manage a creative tension in myself and in the organization. My experience is the same I hope to steward for students, one in which they master the creative tension in themselves and in the whole performance experience.

The greatest outcome of this project may not be student learning, but rather the organizational development it inspired to that end. My hope is that by starting with this small application of design planning, Curtis begins to not only adopt design principles into the core curriculum, but also to embed systems thinking in how they think about education. Ackoff (1999) describes a Systems Age education as a continuous process that focuses on the learning, not teaching. In his view, an education should be organized around the development of the desire to learn and the ability to satisfy this desire. In addition, the "Systems Age education should individualize students and preserve their uniqueness by tailored itself to fit them, not requiring them to fit it" (Ackoff, 1999, p.151). It is my hope that a systems approach to the Curtis education will develop

musicians who expand their view of their art to include the whole performance experience. Through that lens they will be able to construct the very practice worlds in which they live out their professional lives. In doing so, they become the transformational leaders the art form needs them to be.

## NOTES

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<sup>i</sup> A folksonomy is the result of personal free tagging of information and objects for one's own retrieval. It is tagging in a social environment (shared and open). The act of tagging is done by the person consuming the information  
(<http://www.vanderwal.net/essays/051130/folksonomy.pdf>)

<sup>ii</sup> The Delphi method is a systematic, interactive forecasting method which relies on a panel of experts. The experts answer questionnaires in two or more rounds. After each round, a facilitator provides an anonymous summary of the experts' forecasts from the previous round as well as the reasons they provided for their judgments. Thus, experts are encouraged to revise their earlier answers in light of the replies of other members of their panel. It is believed that during this process the range of the answers will decrease and the group will converge towards the "correct" answer. Finally, the process is stopped after a pre-defined stop criterion (e.g. number of rounds, achievement of consensus, stability of results) and the mean or median scores of the final rounds determine the results.



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## APPENDIX A

### NOTED CURTIS ALUMNI

Noted Curtis Alumni (<http://www.curtis.edu/about-curtis/history/curtis-alumni-since-1924/>). Some representative alumni include:

Rose Bampton	Voice	<i>Class of 1934</i>
Samuel Barber	Composition	<i>Class of 1934</i>
Leonard Bernstein	Conducting	<i>Class of 1941</i>
Jonathan Biss	Piano	<i>Class of 2001</i>
Judith Blegen	Voice	<i>Class of 1964</i>
Marc Blitzstein	Composition	<i>Class of 1926</i>
Jorge Bolet	Piano	<i>Class of 1940</i>
Yefim Bronfman	Piano	<i>Class of 1977</i>
Vinson Cole	Opera	<i>Class of 1976</i>
John de Lancie	Oboe	<i>Class of 1940</i>
Roberto Díaz	Viola	<i>Class of 1984</i>
Juan Diego Flórez	Voice	<i>Class of 1996</i>
Lukas Foss	Conducting, Composition, Piano	<i>Class of 1940 - 1942</i>
Pamela Frank	Violin	<i>Class of 1989</i>
Alan Gilbert	Conducting	<i>Class of 1992</i>
Boris Goldovsky	Conducting	<i>Class of 1934</i>
Richard Goode	Piano	<i>Class of 1964</i>
Gary Graffman	Piano	<i>Class of 1946</i>
Guarneri Quartet		
Daron Hagen	Composition	<i>Class of 1984</i>
Hilary Hahn	Violin	<i>Class of 1999</i>
Lynn Harrell	Cello	<i>Class of 1963</i>
Miquel Harth-Bedoya	Conducting	<i>Class of 1991</i>
Shuler Hensley	Opera	<i>Class of 1993</i>
Jennifer Higdon	Composition	<i>Class of 1988</i>
Eugene Istomin	Piano	<i>Class of 1945</i>
Paavo Järvi	Conducting	<i>Class of 1988</i>
Leila Josefowicz	Violin	<i>Class of 1997</i>
Young Uck Kim	Violin	<i>Class of 1970</i>
Lang Lang	Piano	<i>Class of 2002</i>
Jaime Laredo	Violin	<i>Class of 1959</i>
Cecile Licad	Piano	<i>Class of 1978</i>
Leon McCawley	Piano	<i>Class of 1995</i>
Anthony McGill	Clarinet	<i>Class of 2000</i>
Gian Carlo Menotti	Composition	<i>Class of 1934</i>

Miami Quartet		
Anna Moffo	Voice	<i>Class of 1954</i>
Eric Owens	Opera	<i>Class of 1995</i>
Vincent Persichetti	Conducting	<i>Class of 1939</i>
Philadelphia Orchestra members (nearly 50%)		
John Relyea	Opera	<i>Class of 1996</i>
George Rochberg	Composition	<i>Class of 1948</i>
Ned Rorem	Composition	<i>Class of 1944</i>
Aaron Rosand	Violin	<i>Class of 1948</i>
Leonard Rose	Cello	<i>Class of 1939</i>
Nino Rota	Composition	<i>Class of 1935</i>
Nadja Salerno-Sonnenberg	Violin	<i>Class of 1975</i>
Michael Schade	Opera	<i>Class of 1990</i>
Peter Serkin	Piano	<i>Class of 1964</i>
Rinat Shaham	Voice, Opera	<i>Class of 1995, 1998</i>
Ignat Solzhenitsyn	Piano, Conducting	<i>Class of 1995</i>
Robert Spano	Conducting	<i>Class of 1985</i>
Michael Stern	Conducting	<i>Class of 1986</i>
Time for Three		
Benita Valente	Voice	<i>Class of 1960</i>
George Walker	Piano, Composition	<i>Class of 1945</i>
Yuja Wang	Piano	<i>Class of 2008</i>
Hugo Weisgall	Composition	<i>Class of 1939</i>

APPENDIX B  
MESS PRESENTATION

Slide 1

Curtis Institute  
Student Recital Series

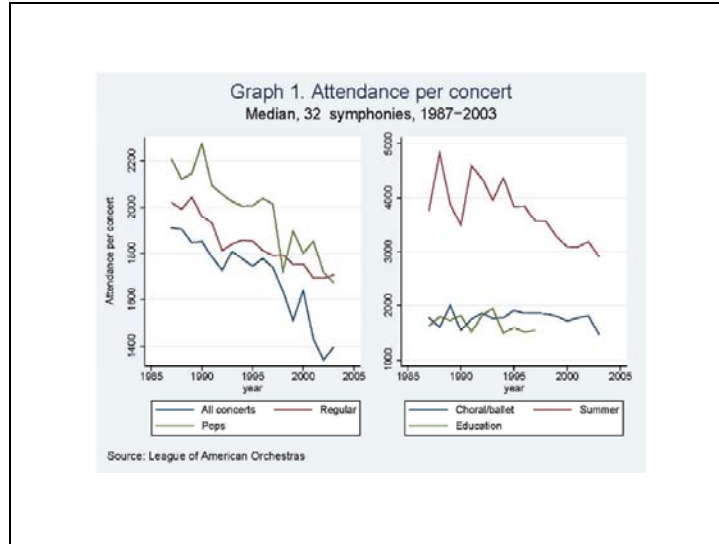
Mess Formulation

Slide 2

**Declining Concert Attendance**

- The National Endowment of the Arts (NEA) found that only 34.6% of US adults attended an arts activity in 2008.
- This number is a significant decline from 41% in 1992.
- Concert Attendance is at its lowest levels in 1982.

Slide 3



Slide 4

## Access to Technology and Declining Concert Attendance

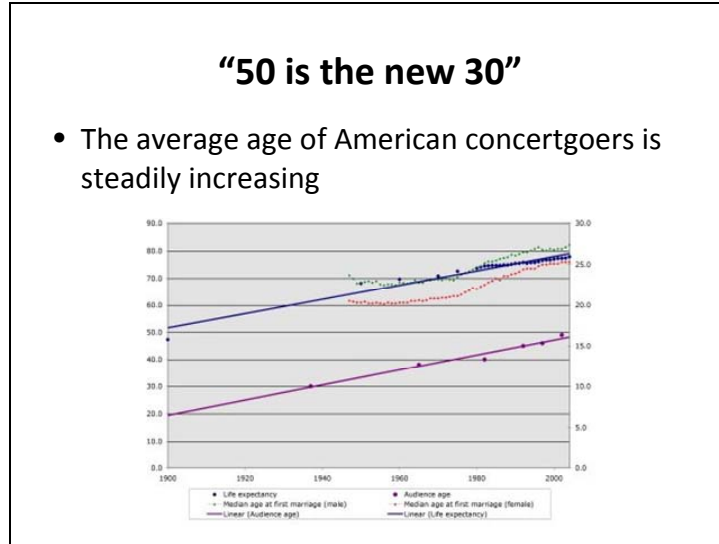
- While the economy is currently down, it was not the case for many of the years between 1992-2008.
- Technological advancements are also a factor in declining attendance.
- 40% of U.S. Adults watched some kind of performance online
- Over 40 million Americans (15% of US population) accessed Classical music through the Internet or other media

**FIGURE 1-7**  
Number and percent of U.S. adults and number who watched or listened to a recorded or broadcast performance at least once in the past 12 months: 2008

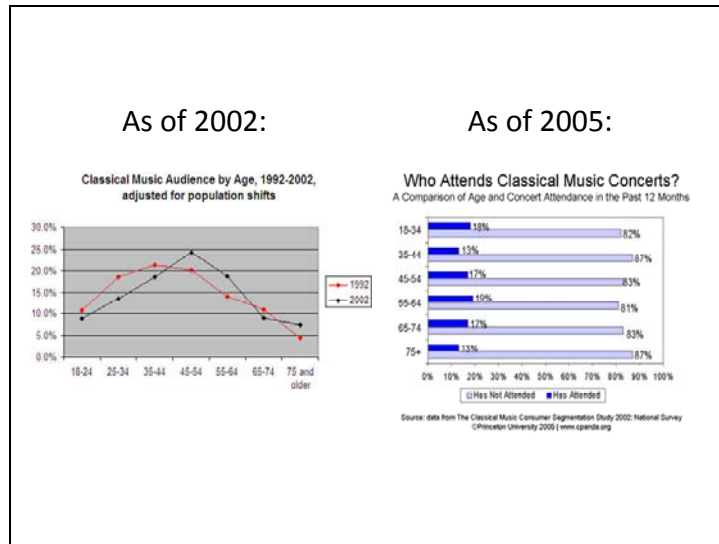
Performance Type	Percent of Adults	Number of Adults (Millions)
Classical Music	12.8	40.1
Latin Music	14.9	39.4
Jazz	14.2	38.8
Dance	8.8	28.0
Musical	7.8	27.8
Non-Musical Plays	6.8	25.2
Opera	4.8	18.8

Source: 2008 Survey of Public Participation in the Arts.

Slide 5

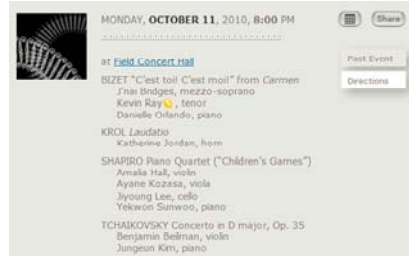


Slide 6



Slide 7

### Free Concert Publicity Comparison: Curtis Institute vs. Philadelphia Orchestra



- Publicity for the Curtis Student Recital Series is given through the Curtis website, signs posted outside the 1726 Locust St building, handouts at the 1726 guard's desk, and cable/radio stations on WHYH.
- Over 24,000 free seats are made available each season through the Curtis Recital Series.
- Unlike the orchestra concerts given in Verizon Hall at the Kimmel Center each season, the student recitals are not publicized such as personal mailings/e-mail notifications, and season subscription brochures.

Slide 8

- Free concerts are publicized through personal e-mail, mailings, season brochures, and concert pamphlets.
- Visually, the Philadelphia Orchestra Free Concert website is engaging and relatable.
- On a general scale, the Philadelphia Orchestra/Kimmel Center pulls in more people annually for events than Curtis to promote their free concerts.



## Slide 9

### Personal Connection/Intimidation

#### Factors that contribute toward a **“cold” performance:**

- Small amount of speaking – According to Matt Barker (most consistent attendee), a rough 35% of performances have student speaking in them.
- If the concert-attendee does not come with a group, there is no socialization factor, therefore creating a lonely atmosphere until the recital starts.
- Program notes only exist for biographical information, song lyrics, or for alumni concerts.
- Perceived uncomfortable nature of close together, stiff-backed chairs
- Average age in audience could isolate “younger” audience member
- Dress code (or lack thereof, or confusion)
- Performers may not want or need to talk to audience members afterward.

## Slide 10

### Greater Philadelphia Cultural Alliance “Research into Action”

#### Philly scores well, but there’s still room to grow

- In 18 out of 20 cultural disciplines, Greater Philadelphia’s cultural attendance rates were above the national average. However, even here, many residents still view arts attendance as a **“special occasion”** event, not a part of everyday life, and others never attend at all.

#### Family matters

- Traditional wisdom has been that when a couple has children they drop out of the cultural system. The Cultural Engagement Index shows that tenet to be false. In fact, **families with children have the highest engagement index of any life-stage cohort.**
- 4 out of 5 of Philadelphians surveyed see the arts as vital to children’s social, intellectual and civic development. At the same time, **less than half of them see arts organizations as “children-friendly.”**

## Engage 2020 Research

### Barriers to the Arts

- In addition to the cost and the “hassle” factors, parents — mostly moms — struggled with finding product that would **appeal to their entire family**, including younger children, older children (teens) and parents.
- While arts and culture carries inspirational value, **it does not deliver on young people’s desire to socialize**. Overall, the risk, reward and relevance equation is not working in arts and culture’s favor among consumers: it’s viewed as too risky (high cost and hassle factors), with **not enough reward or relevance**. Younger people are unlikely to “age in” to higher frequency use of arts and culture. Their attention is now directed elsewhere — online, using digital media to express themselves creatively, towards socializing in bars and clubs — and **there is no current pathway guiding them to cultural attendance**.
- The sometimes intimidating nature of arts and culture venues (**not knowing the standards for how to behave, the need to sit still and be quiet**).

## Cost of Transportation to Curtis Student Recital

	Parking Garages	Public Transportation (regional rail, roundtrip evening fare)
Weekdays	\$9.50-\$17.00	\$7.00 - \$17.50
Weekends	Up to \$19.00	\$7.00 - \$17.50

Parking garage data taken from three parking garages (18<sup>th</sup> and Walnut, 17<sup>th</sup> and Chancellor, Mozart Place between 17<sup>th</sup> and 18<sup>th</sup> streets)

Slide 13

## Leisure Time

- Americans work about nine hours more today than they did twenty years ago.
- When surveyed, Americans report that they have only sixteen and a half hours of leisure a week.
- Hours have risen for men and women, for all marital statuses and income groups, across a wide range of industries.
- Nationwide, people report their leisure time has declined by as much as one third since the early 1970s.
- In a study ranking fourteen popular leisure time activities, attending music concerts (excluding rock and country concerts) rated thirteenth.

This data is quoted from Juliet Schor's book *The Overworked American*.  
Schor is a professor at Harvard University and from data provided by Pearson Education, Inc.

Slide 14

## Arts Exposure and Funding

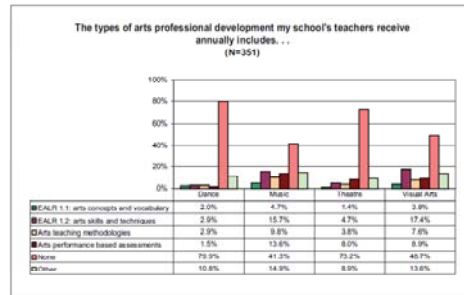
- K-6 students receive **no significant funding** for musical studies.
- An **inverse relationship** exists between student age, and outside musical influence as encouraged by fieldtrips/visiting artists.

Current Status of Arts Education Program Funding (1996-2006) Survey

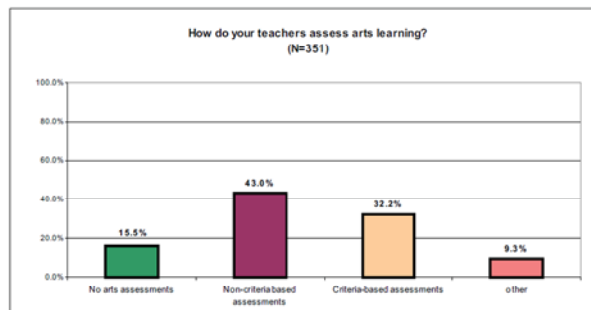
	Teachers	Instructional Materials	Musical Instruments	Fieldtrips, Artist in Residence, Community Support	Administration & Professional Development	Totals
Elementary School	No visual arts, theater, or dance teachers \$0	\$0	\$0	\$45,000 for after school field trip activities	\$0	\$45,000
Middle School	4--band teachers 0--choral teachers \$260,000	\$10,000--to support music program	\$45,000	\$29,500 for after school program	\$0	\$344,500
High School	3 band teachers 2.5 choral teachers 8 theater teacher 4 Art teachers \$715,000	\$22,000--support all VAPA programs	\$100,000	\$0	\$400	\$837,400
District Funds	\$875,000	\$32,000	\$145,000	\$0	\$0	\$1,152,000
Categorical Funds				\$45,000	\$400	\$45,400
Community Funds				\$29,500		\$29,500
<b>Total Funds</b>	<b>\$975,000</b>	<b>\$32,000</b>	<b>\$145,000</b>	<b>\$74,500</b>	<b>\$400</b>	<b>\$1,128,900</b>

## Lack of K-12 Arts Education Standards

- Teachers receive little, if any, professional arts development on an annual basis.

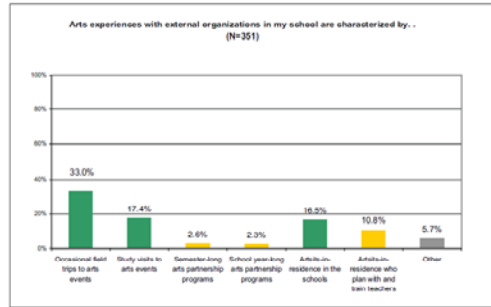


- This, in turn, fosters a subjective approach to arts learning assessment.



Slide 17

- Poor funding and inadequate teacher training, coupled with a baseless system of assessing student artistic growth, promotes little interest in external arts experiences.



Slide 18

### No end in sight.

- Pennsylvania state stimulus funding allocated by the Federal Government to the Arts and Arts Education, 2009-2010:

**\$359,200**

- Total PA state stimulus funding:

**\$7,996,333,502**

- Arts and Arts Education as a percentage of total projected PA stimulus budget:

**.0045%**

## APPENDIX C

### PROBING QUESTIONS

#### **Curtis Institute of Music**

#### **Idealized Design Session**

Saturday, October 2, 2010 -2:00-5:30pm

University of Pennsylvania – Kade Center

#### **Agenda**

2:00pm Introductions

2:15pm Orientation to the design process

3:00pm Breakout groups - imagine the ideal Curtis student recital

4:30pm Reassemble to share group ideas

#### **Mission Statement**

To educate and train exceptionally gifted young musicians for careers as performing artists on the highest professional level.

#### **Student Recital Information**

The Curtis Student Recital Series offers more than one hundred free public performances each season, making available more than 24,000 free seats to Philadelphians every year. Students perform in Field Concert Hall almost every Monday, Wednesday, and Friday night throughout the school year, with additional recitals in the spring. Some recitals take place at nearby venues such as St. Mark's Church or the Church of the Holy Trinity, Rittenhouse Square.

Most student recitals offer a wide variety of solo and chamber works performed by mixed ensembles. Other events on the series include graduation recitals, faculty tributes, department recitals, and special events highlighting guest artists and residencies. Each year Curtis devotes a number of recitals to the music of our time with performances by 20/21: The Curtis Contemporary Music Ensemble, as well as performances of works by Curtis composers.

Student recitals are recorded by Curtis for educational use and possible broadcast. Highlights are featured on public radio stations WHYY-FM in Philadelphia and WITF-FM in Harrisburg. Select recitals are broadcast on Y Arts, a digital television channel of WHYY-TV. Simulcasts of select recitals are also available via Specticast's "Live from Curtis" series.

#### **Facilitator Questions**

##### **AUDIENCE**

What kinds of patrons (or audience members) should Curtis attract to student recitals? In what geographical locations should they be sought? How should they be approached?

Should the audience be exposed to student recitals through broadcast media or print? Once a relationship is made, how should it be nurtured? Should feedback be collected from audience members? If so, when - before, during and/or after the performance? And how?

Who are Curtis's student recital competitors? How should the newly designed student recitals differentiate itself?

Should the audience have any charge associated with the performance experience?

## **FACILITIES & EQUIPMENT**

Where does the ideal recital take place?

What does the seating look like?

Where are the musicians in comparison to the audience?

Are refreshments provided? If so, what are they, where are they located? Do patrons consume these before during or after the performance?

Is it a casual environment or formal?

What elements are needed to create the desired performance space?

## **PROGRAM**

What music is being performed?

How should performers and support personnel be recruited, oriented, educated, prepared?

Are there other artistic elements incorporated into the program?

What interactions take place between musician and audience?

Is additional information about the program provided? What information is included? And in what format?

How long is the presentation? What is the structure?

What services are provided to recital participants? To audience, to students, to faculty? How do these differentiate from those currently available?

How should new services be designed, developed and initiated? Who is responsible for design, development and initiation? What should be charged for additional services?

How should the quality of the program be assured?

## **TECHNOLOGY**

What technology, if any, is incorporated into the recital experience?

Is it a part of the program?

Is the performance transmitted live, recorded for later broadcast, repackaged for other services?

How should quality be assured?

What vehicles are used to distribute?

### **ORGANIZATION**

What function must the organization perform in order to produce the outputs it desires to produce?

How will recital planning and decision-making be vertically integrated and horizontally coordinated?

What authority and responsibilities should be assigned to managers? Who should be responsible for planning, execution, performance evaluation?

How should non-administrative personnel be involved in the management processes?



## APPENDIX E

### STAKEHOLDER SPECIFICATION SYNTHESIS

- Each recital is an individual creative process, not a fixed model (8)
- Programming that inspires curiosity and continued engagement (6)
- Comfortable atmosphere: chairs, food wine (engaging all 5 senses) (6)
- Making a connection with the audience that acknowledges a personal relevance – why does this matter to me? (4)
- Dynamic audience interaction create opportunities for discussion throughout (4)
- Conviction -> based on training, education, and values (4)
- Using music to connect
  - cultures
  - genres
  - ideas
  - people (3)
- Emotionally engaging for performer and audience (3)
- Concert available via multiple platforms (3)
- External/non-musical elements support the musical experience (3)
- Recitals online/stream (3)
- Program for the highest common denominator (3)
- Knowing what the piece means to the performer – something personal (3)
- Spontaneous performance (3)
- Use recitals to develop students' ability to program (3)
- cost of concert is no barrier to attendance (2)
- concert location can be chosen by performer (2)
- Ease social expectations (2)
- Communicate logic behind concert design (2)
- Recitals in different communities (venues) (2)
- Curtis app used during the recital context
  - interactive program notes (2)
- Program or idea driven (2)
- Very social experience (2)
- No separation between audience/performer (2)
- Improvisation/jazz (1)
- Concerts embody and encourage highest musical standards (1)
- comfortable (1)
- A performance that educates both audience and performer and entertaining (1)
- Goal: connect with the audience (1)
- Fresh interpretation (challenges audience) (1)
- Tell a story (1)
- Educating the audience as educating student (1)
- An entry point communicated by performer (1)
- Direct expression of passion for music (1)
- Create opportunities for discussion throughout (1)
- Interaction between performer and audience (1)

- “Fun” experience (1)
- Fantastic feeling after concert, uplifted
- Live commentary by performer but not before first piece (1)
- After concert Q + A/reception (1)
- Mixture of the arts (classical + jazz + pop) (1)
- Responsible audience prepared to enjoy music → returns energy (1)
- Contemporary music (1)
- Variety of music or genres (1)
- Message communicated by performer (1)
- Incorporation of other arts ← must be connected (1)
- Provide artists with opportunity to learn about themselves by performing in varied venues and audience (1)
- Use intermissions for interaction (1)
- Ideally, what if people had a chance to participate to do something. For example, go to Curtis at 4pm, get a lesson, then go to a recital. Give people the opportunity. Play and touch these things. Hard to pull people out of thin air and pay attention to what we do if haven’t engaged in 30 years. Show people how to hold instrument. Basketball- people appreciate because they have tried it. Also, the social thing. Ideally, could we create a strong social event that is not all about the music. NY philharmonic – picture contest. People came for the social. (1)

- Connect (8)
- Social (8)
- Comfort (7)
- Personal (8)
- Interpretation (1)
- Venue (5)
- Audience (39)
- Program (11)
- Experience (20)
- Communicate (5)
- Engage (11)
- Educate (7)
- Fresh (2), modern (1), contemporary (3)
- Dynamic (2)
- Opportunity (11)
- Authentic (1)
- Value (9), standard (5)
- Online (2)
- Platforms (3)
- Design (3)

- Audience (39)
- Experience (20)
- Value (9), standard (5) (14)

Program (11)  
Engage (11)  
Opportunity (11)  
Connect (8)  
Social (8)  
Personal (8)  
Comfort (7)  
Educate (7)  
Fresh (2), modern (1), contemporary (3) (6)  
Venue (5)  
Communicate (5)  
Platforms (3)  
Design (3)  
Dynamic (2)  
Online (2)  
Interpretation (1)  
Authentic (1)

#### AUDIENCE

- Making a connection with the audience that acknowledges a personal relevance – why does this matter to me? (4)
- Dynamic audience interaction create opportunities for discussion throughout (4)
- Emotionally engaging for performer and audience (3)
- No separation between audience/performer (2)

#### EXPERIENCE

- Comfortable atmosphere: chairs, food, wine (engaging all 5 senses) (6)
- External/non-musical elements support the musical experience (3)
- Very social experience (2)
- Ease social expectations (2)
- Curtis app used during the recital context-interactive program notes (2)
- “Fun” experience (1)
- Create opportunities for discussion throughout (1)

#### VALUES

- Conviction -> based on training, education, and values (4)
- Concerts embody and encourage highest musical standards (1)

#### PROGRAM

- Each recital is an individual creative process, not a fixed model (8)
- Programming that inspires curiosity and continued engagement (6)
- Program for the highest common denominator (3)
- Use recitals to develop students’ ability to program (3)
- Knowing what the piece means to the performer – something personal (3)
- Program or idea driven (2)

## CONNECT

-Using music to connect

-cultures

-genres

-ideas

-people (3)

-Incorporation of other arts ← must be connected (1)

## APPENDIX D

### ALL STAKEHOLDER SPECIFICATIONS

#### GREEN TEAM

my ideal recital would be that it feels like this guy looks. I'm a music fan and could potentially love it. I like rock shows, contemporary music shows because fun, uplifting. imagination and creativity is expressed captured in emotional and physical way. I like to be standing, moving, be engaged that way.

it would be great if people could feel comfortable with who they are in the space of this performance. they can sit wherever want to sit. come way they are. there are no limitations. I could talk to friend across the hall during performance.

where performers are performing/engaging, that will capture the interest of others listening, watching, there.

if people want to sit at home in their pajamas on computer, they can.

it should be webcast.

an ideal performance for me would be that the audience's desires and ideals should be included in this. would have people who are not in music industry help design. people who are not performers, administrators, not engaged from professional standpoint. customers.

the music. music library. choices of what gets performed. things that haven't been performed before because unusual? core repertoire the audience knows? maybe play excerpts of longer pieces rather than whole piece. some of this, last part of that. "highlights"

people have commentary. performer says why perform 3<sup>rd</sup> movement of x and 4<sup>th</sup> of why. education. whether delivered electronically or talking to listeners. performer commentary.

sometimes performer does an introduction.

in my ideal recital, there would be a very personal connection between the audience and performers, which would involve some talking. and also have more senses than hearing. perhaps art on wall, wine. multiple. possibility of projecting images on the sides.

in my ideal recital, a way for all these disparate preferences to exist at the same time. what I love and you hate, each can get what wants.

think of revival – where performer gets audience so engaged, they stomp and shout. gets the blood running.

I'd also like to see personal connections be made with people. invite everybody, for example, to think about a tragic moment in their life. can present music rather than it be about me. okay to have a two hour recital where 20-30 minutes is spoken. talk about how practiced, for example. debrief after performance. reception. can talk about good and bad, etc. could have immediate feedback to performer as part. best way to build an audience and have people want to come back for more.

students are authentically themselves creating program that means something to them personally so passionate. performing music that matters to them. so can say what they want to say to you in a broad sense. and if creating a whole program, can do in a whole, unified way

programs (what will play) are created a week ahead. the Saturday before, program comes out and says what happen mon through Friday that week. audience doesn't know in advance what will see. can come and see. helps student do what thinking about tat moment. adds spontaneity.

ideally, do things that don't offend existing audience, but a way to welcome new people, ears. performers talking a bit, explaining the music a bit. could help the audience know what to listen for, for example.

website – info on a given concert – would be very comprehensive. would provide a good deal of info about composer, particularly for those are not familiar. could learn about composer, performer. so not much mystery about performer.

\in my ideal recital, everyone in the community would be welcome and the chairs would be really comfortable.

the ideal of students just playing stuff they want to play. not for competition. not teachers saying what they should play. not teachers saying play this. students present only stuff they are passionate about. no need to play Bach sonata you really don't want to perform.

I think part of my ideal performance would be an element where it erases this notion of great art. great art can connote a barrier. to hold up as art could keep people away from this ideal performance. what makes this art great is wide appeal to people on an emotional level.

all the horrible things that the great composers did – hot mess.

lose the reverence.

emphasize the fun element of composers and music. emphasize the “greats” were real people.

no barriers – economic, social, class-based, racial, ethnic. across the board, no barriers.

extend across the repertoire. share bluegrass and rap, for instance.

when we were listening to recital – behaving as hushed audience. so retrain audience so relaxed, applause between.

in my ideal recital, I want quiet and can focus and concentrate and not be distracted.

for me, the time element and quiet can be an ideal as well. some times. multimedia in other times.

in ideal recital, physical venue, whether there or podcast – people want to come, feel welcome and comfortable. beautiful. could have living room setting. couches. coffee tables. lots of chairs, few chairs.

could watch the process – the preparation for the recital. for example – very open rehearsal. could play a contemporary piece of music. performers could hate at beginning but come to like it. people could watch the process of going through it. why did this, that.

possible to record, leave the cameras on for the rehearsal. costs next to nothing. people could watch rehearsal. “pre-game” activity.

15-minute handcam. could see what happens, happened. could hear people talk about the piece. hear people complain about who’s playing louder. experience what we experience to prepare.

great band that played Madison Sq garden a month ago – webcast. half hour pre-show thing produced that put up online. was really engaging. ideally, Curtis should hire a director and producer that does film.

I can see where a webcast can bring in a lot more viewers, but is idea to bring more people physically at Curtis or just aware of series.

ideally, the recital should reach as many people as possible across multi platforms, and be available for the indefinite future. infinite video archive.

my ideal performance is evanescent. lives in the moment. value is it won’t be here forever.

there's a social element to the live.

for me, I would want my ideal recital would be a live recital that can co-exist in a broadcast without compromising on another. so, director, somehow wouldn't be reshaping the live experience for purpose of broadcast unless good.

could say never record it so go – because will never hear it again. I'm not anti-recording – has value that people pay for because special – pay for experience in life. moment in time. beyond value.

hear about this stuff and say would want to go see it. Yo Yo Ma falling off platform.

I really like the fact that people can see the human being in yo yo ma. can see performer behaving in organic way.

ideally no field concert hall. concert hall would be in various parts of the city. performance taken out to the city.

ideally, wherever performance is free. could be promoted through traditional and non-traditional channels.

ideally, rather than free, people could contribute to the extent that they were able to. people with great deal of money who feel great value, could give accordingly. those without means, not as much. like tithing at church – give according to means. people don't value free. psychologically, people don't value free – take free for granted. as artists, we don't live on air.

### Key Themes So Far

freedom of venue/access; personality  
multi-platform – physical and electronic  
pay what you can  
performance walk line between “in moment” and “living for eternity”  
choice of repertoire  
physical stuff around performance – staging, lighting, comfort (e.g., couches)  
relationship between performer and the audience  
concert experience itself  
Informality

### Continuation of Capturing Ideal Specifications

develop something so flexible and dynamic so we not build a model that gets stale

in the ideal recital – the surroundings – lighting, etc. – would enhance the experience. lighting match the darkness of a piece. lighting style, chairs, environment change depending on the piece so enhances musical experience. visuals, hanging art, lighting – of a quality that matches.



a complete, total experience.

ideally, no guidelines on creating a rehearsal. allows creativity in putting together an event.

open mike night.

each performer would be given the responsibility to produce their own recital the way they want as see fit. could talk about choices before perform. could print traditional program.

ideally, these students are very creative, and it could be great to give them lots of opportunities to express this creativity.

ideally there would be some demonstration of improvisational ability. would be appraised and valued in the performance experience.

ideally, Curtis performances would look like holiday parties. each year we try to outdo holiday parties. students would be encouraged to be creative and outdo what happens. power in the hands of the people who can really make it creative. including those who are not in the "business."

for me, the perfect recital would have all these new elements we are talking about but would maintain a great respect and integrity to the music we play. bulk is existing music. so not change too much that changes the art itself. change mannerisms and habits but not changing the heart and soul of our art.

if classical music wants to continue to be relevant and part of mainstream culture, they need to recognize that mainstream culture exists and they need to at least try to be a part of it.

we shouldn't change the art itself but, as a fan of music, saw bang on a can in World Café Live, and amazing. open it up just enough to be accessible but maintain integrity of the art form.

it's so hard to know how to become a part of mainstream culture, but not have metaphor of Cuban restaurant serve big mac.

hardest part is having person go to the first concert. what if we go to them?

issue speaks to is people stay away because of the music.

ideally, what if people had a chance to participate, to do something. for example, come to Curtis at 4:00, get a lesson, then go to a recital. give people the opportunity.

play and touch these things. hard to pull people out of thin air and pay attention to what we do if haven't engaged in 30 years. show people how to hold instrument. basketball – people appreciate because have tried it. also, the social thing. ideally, could we create a strong social event that is not all about the music. NY philharmonic – picture contest. people came for the social.

what if the recital were a social event?

no inherent reason to think large groups of performers different from small.

artistic standards are pushed even higher in our new process. in the ideal recital, artistic standards are pushed even higher.

no single ideal recital. various options.

we would go for as many different reasons, as there are different people, but whatever on stage, performed, or whatever, the artistic standard is pushed even higher.

in the end, it's the music.

we won't all agree on what is higher, but pushing for higher.

when music is the center and focus, things come out of that.

if product is crap, can't fix that. but a company like apple. astounding products. computers great, ipods awesome. product is there, but also have such great marketing around product. can't get by just on packaging. so having to stick with great musicianship, artistry. apple took into consideration what people wanted. then drove what people wanted. if we can do that with this whole concert process, would help drive their desire.

ideas process from audience

we'd be clear on what we want to offer and not always listen to what audience wants, so we make something compelling

ideally, different types of music produced, but we want to sell classical music so well within these parameters so we don't have to bring in rapper or blue grass. we would sell classical so well so have deep and engaging experience.

different genres, cultures, ethnicities fusing. not dilute classical but put with other things so augments experience. have pieces influence each other. Ideally, school would allow that type of thinking to flourish.

it's not hard to include classical that has connections with other cultures.

to get other cultures engaged, don't have to bring in pop. lots of stuff is there in classical. just need to have a deeper knowledge of repertoire.

performances done entirely by candlelight. wine. (Oregon orchestra example - sold out every time for 25 years, 6-7 times a year; nothing after baroque). candlelight series.

Educational piece – how free up creativity at Curtis to create this ideal concert? The opportunity and someone to tell me I have the permission to do it and I'll help you do what I can. Little Red Riding Hood performance example. Very enriching experience for all of us. For me, the opportunity to try things. the opportunity, the spark of imagination. dress any way want, even as Little Red Riding Hood.

how balance music experience and the engagement.

space at Curtis for improvisation. project images on screen. lighting dramatically modified. students played for 1 hour to 1.25 hours without any music in front of them. some concerned and some refreshed.

improvisation not outside the classical music tradition – Bach, Mozart.

Curtis Mission - training students to the very highest professional standards. how have innovation be part of core mission. get both. preserve incredibly valuable standards but innovate without losing anything, but not stifle.

Jazz – is there a role for improvisation in Curtis world for jazz/improvisation, in the middle? I think there is.

jazz – performers on stage without music. had a general idea of where going, but improvisation.

Jazz history class.

ideally, it feels like give the opportunity to the students and give them a way to talk about it and discuss it and fail or whatever, guide them through the process. yes, they want to have the time and talent to get into a great orchestra. but people go out and do things creative, new.

I'm just jealous that these students will get the chance to do things I didn't get a chance to.

students just as much a say on what happen on stage Nov. 12.

improvisations on submitted themes. part of ideal concert – sponsor purchases right to submit the theme on which the concert work is based.

## BLUE TEAM

The ideal recital provides a frame of reference for audience members to understand the performance

In the ideal recital there is an information personal interaction between audience member and artistic designer and/or performer that increases meaning and understanding of the music chosen for the performance.

Programming that inspires curiosity and continued engagement

Making a connection with the audience that acknowledges a personal relevance – answers the question for audience “why does this matter to me?”

Fresh interpretation not offered by the pros that challenges audiences

An audience member knows more about the student and has a personal connection.

Live and in front of an audience

Gives the student an opportunity to perform in front of a musically knowledgeable people

Goal of the ideal recital is to connect with the audience

Recitals in different communities (venues)

Tells a story

Educating the audience as educating the student

Provides an entry point communicated by performer

Fundamental value of music as a universal language

Removes the categorization of music

Direct expression from performer of the passion for music

Variety of recitals/events

Eases social expectations

Caters to modern attention span

Matches a variety of repertoire with audience taste and outstanding

Communicates the experience of sound

Surround the musicians with audience

Gives audience a variety of seating options/perspectives in which to experience the music

Technology complements recital, aiding in the communication and education of audience

Recitals online and streamed

Use web resources to expand audience

Technology is used to communicate logic behind concert design

Chance to get to know the artist

Provides a comfortable environment and network of learning organizations to support students through the learning process

Complete the performance of a piece and then provides the audience with an opportunity to “talk back”

Incorporates dynamic audience interaction, creating opportunities for discussion throughout

Free

Provides a way to earn revenue to support the education.

Addresses the broadest “classical music” audience in Philadelphia

Programmed for the highest common denominator

Provides artists with the opportunity to learn about themselves by performing in various venues and in front of different audiences

Opportunity to push students in new repertoire directions

Addresses all levels of audience experience with music

Single-click access to more – more repertoire, more knowledge

Curtis application used during the recital context – interactive program notes that addresses different curiosities

Maintain a pause in the middle

Flexible format and length

Use intermissions for interactions

Use recitals to develop students ability to program.

## YELLOW TEAM

One that happens

Music they love

Artists they love

Comfortable space

Inspiration/challenged

Improvement of self

Interaction between performer and audience to get answers to questions they have about performance/music/self growth

Relationship with performer

“fun” experience

fantastic feeling after concert – uplifted

stage presence

upon arrival, greeting and personal contact

live commentary by performer but not before first piece

eye contact /acknowledgement between performer and audience

Knowing what the piece means to them

Program notes

Being able to share your experience with other people physically

More human performer/performance

Learning something from the performance

Audience participation

Having children in the audience ( at least a younger generation)

Very social experience

No separation between audience and performer

Conversation between performer and performer and audience and performer

Sandwich: performance – q&a/interview/conversation – performance

Not too long – especially first half

Entertainment

Comfortable atmosphere: chairs, food, wine

Engaging all five senses

After concert Q&A reception

The “choice” to talk to a performer

Dinner theater concert

More informal atmosphere

Mixture of the arts (classical +Jazz+pop)

Shorter pieces

Responsible audience prepared to enjoy music – returns energy

Accessible concert information

Contemporary music

Program or idea driven

Variety of music or genres

Ambassadors/schmooze

Marketing

Message communicated by performers

Multiple performances – changing rooms (channels)

Spontaneous performance

Historical connection to venue

Incorporation of other arts – must be connected

Performers have a great time

Conviction – based on training, education values

Shorter concerts – 60-75 minutes no intermission



## APPENDIX F


### FIVE MAJOR THRUSTS

Slide 1



Slide 2

# Folksonomy



On October 6, 2010 the student design team used **folksonomies** - the emergent labeling of lots of things by people in a social context – to make sense of the ideas collected in the idealized design workshop on October 2.

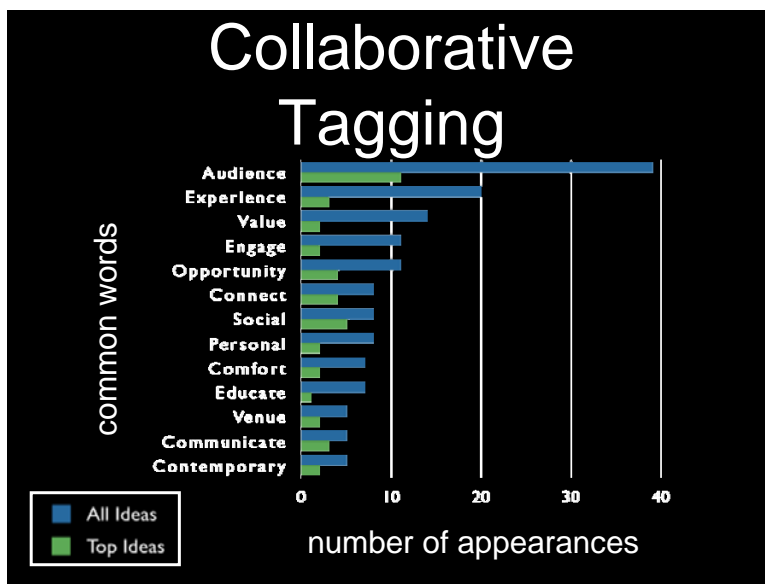
A **folksonomy** is a system of classification derived from the practice and method of collaboratively creating and managing [tags](#) to annotate and categorize content. This practice is also known as **collaborative tagging**, **social classification**, **social indexing**, and **social tagging**. Folksonomy, a term coined by [Thomas Vander Wal](#), is a [portmanteau of folk and taxonomy](#). To learn more about folksonomies go to <http://en.wikipedia.org/wiki/Folksonomy>.

Slide 3

## Process

1. The ideas captured at the idealized design workshop on October 2 were posted on the classroom wall.
2. The design team created a working document to record the ideas that received participants' votes. The team called these the "top ideas." The top ideas were listed by number of votes received. See [Idea Synthesis](#) document.
3. The team scanned the flip chart lists and noted words that frequently appeared.
4. An electronic document containing all the ideas captured on both the flip chart lists and the green team's document was opened and named "All Ideas". The team used the "find" tool to count how many times each noted word appeared throughout. See [All Ideas](#) document.
5. It was agreed that we would use an image to convey these common words to present these words.
6. The design team used the "find" tool to search for the thirteen (13) words that appeared five (5) or more times in the All Ideas document in the top ideas.
7. The top ideas with the common words were then organized into five major thrusts.

Slide 4



Slide 5

# Tag Cloud

WR  
DL Wordle

## Try it at home

[www.wordle.net](http://www.wordle.net)

A **tag cloud** or **word cloud** (or **weighted list** in visual design) is a visual depiction of user generated **tags**, or simply the word content of a site, typically used to describe the content of web sites. Tags are usually single words and the importance of a tag is shown with font size or color.[1] Thus, it is possible to find a tag by popularity.

[http://en.wikipedia.org/wiki/Tag\\_cloud](http://en.wikipedia.org/wiki/Tag_cloud)

Slide 6





## Slide 9

# Audience

- Making a connection with the audience that acknowledges a personal relevance – why does this matter to me? (4)
- Dynamic audience interaction create opportunities for discussion throughout (4)
- Emotionally engaging for performer and audience (3)
- No separation between audience/performer (2)

## Slide 10

# Experience

- Comfortable atmosphere: chairs, food, wine (engaging all 5 senses) (6)
- External/non-musical elements support the musical experience (3)
- Very social experience (2)
- Ease social expectations (2)
- Curtis app used during the recital context-interactive program notes (2)
- “Fun” experience (1)
- Create opportunities for discussion throughout (1)

Slide 11

# Values

- Conviction -> based on training, education, and values (4)
- Concerts embody and encourage highest musical standards (1)

Slide 12

# Program

- Each recital is an individual creative process, not a fixed model (8)
- Programming that inspires curiosity and continued engagement (6)
- Program for the highest common denominator (3)
- Use recitals to develop students' ability to program (3)
- Knowing what the piece means to the performer – something personal (3)
- Program or idea driven (2)

# Connect

- Using music to connect (3)
  - cultures
  - genres
  - ideas
  - people
- Incorporation of other arts must be connected (1)

## APPENDIX G

### RECITAL BLUEPRINT

**November 9, 2010**  
**“Side by Side at Curtis”**  
**Artistic Plan – Mess/Design Team**

#### **BASIC**

Monday  
Location: Perelman (FCH)  
Time: 8 pm

#### **IDEAL AUDIENCE**

Curtis Community (including donors; personal student social networks)  
Jefferson/Young/Hip Crowd (potential donors)  
Old and New  
Socio-economically diverse  
Ad - Formal dress not required

#### **PRECONCERT**

Dinner Reception (Parc or Prime) OPTIONAL  
Curtis Students part of dinner, possibly with donors  
Host present “road map”

#### **THEME – PAST/PRESENT/FUTURE**

Curtispolooza, heritage, side-by-side, tribute, respect, lineage , unexpected Curtis, Curtis composers,  
Explore new realms of rep/composers

#### **MESSAGES**

- Students/performers are future of classical music
- Connections between pieces and performers

#### **ADDITIONAL ELEMENTS**

Scavenger Hunt  
Tickets  
iPhone Door Prize  
Catherine Wheel experience – simple; choreography; lighting element

#### **PROGRAM**

Guarneri      Beethoven Piano/String Quartet (X)      Short in length  
Tribute      Quartet – changeable/standard rep  
Favorite quartet (student survey)  
Guidelines



18' Ludwig Catherine Wheel Oboe +String Trio (Current Curtis)

*Intermission – incorporate arts/documents/archives with which audience can intermingle (Bok Room); 1<sup>st</sup> half performers mingle and talk – question audience (what do think?)  
Laptop installations looping personal connection to program  
Show Text*

16' Barber Knoxville: Summer of 1915 Chamber Orchestra (Curtis Composer)  
~~S(or Unknown Piece) – Prelude and Fugue for Organ (Curtis Donor has the original);  
Unpublished work~~

### **PERFORMERS**

Faculty or Alum of 10 years ago combined with current students

Jonathan Biss

Mimi Stillman discuss repertoire

Roberto Diaz, viola

Optimal other venues: Perelmann Stage (comfortability)

### **PROGRAM NOTES:**

Paper program notes

- In-depth Narrative (normal)

Go to this webpage

Open-door policy

Common Room interactive technology experience (CRITE)

- Basic Bubble Pop-ups with notes

The program is separated into two sections, designed to highlight old and new aspects of Curtis. The new vs. old Curtis composer pieces and the new vs. old alumni. Each piece would feature faculty/student performance, therefore enhancing the musical experience (mess/design research). We have also decided to combine a pre-concert talk with a pre-concert reception. For financial reasons, the pre-concert lecture would be free with the optional addition of light fare (\$). This ties in the historical context of each piece and performer as well as the “all around experience” talked about in the mess/design discussions, without excluding families, students, etc. Optimally, the pre-concert talk could include the current composer and some of the performers. Ideally, this reception could take place in the ballroom of Prime Rib for spacial reasons, however, the event could also be done at school. We have proposed to take a survey of the entire school and faculty. This survey will have 5 choices for the instrumentation of the group of alum (10 ys ago). Whichever piece “wins” by majority will close the program.