



# ROPA Delegate Handbook

2017 Edition

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## **PREFACE**

This manual is to be kept and maintained by the elected Delegate of each orchestra. It should be used as a reference tool for your orchestra and as a reminder of your duties as a liaison between ROPA and your orchestra.

When there is a change of Delegate, the document should be passed on to the new representative.

## **REGIONAL ORCHESTRA PLAYERS ASSOCIATION (ROPA)**

ROPA is a Players' Conference of symphonic musicians within the American Federation of Musicians. It provides support services and training to over seven thousand musicians in 87 American orchestras. ROPA is a sister organization to the International Conference of Symphony and Opera Musicians (ICSOM), the Organization of Canadian Symphonic Musicians (OCSM), the Theater Musicians' Association (TMA), and the Recording Musicians' Association (RMA). Each summer, the ROPA annual Conference is attended by Delegates from the member orchestras, the ROPA Executive Board, representatives from the AFM Symphonic Services Division, the AFM International Executive Board, Officers of the other Players Conferences, and other invited guests. The Conference is our opportunity to come together and discuss matters of mutual interest, hear informative speakers, attend workshops, and conduct business that affects ROPA as a whole. In addition to the Conference, ROPA provides its member orchestras with a wide variety of services year-round to help with the many problems that confront regional orchestras. Listed within this handbook are the services ROPA provides.

## **WHY IS BEING A MEMBER OF ROPA IMPORTANT?**

ROPA is a way to seek advice and find solutions by communicating with other orchestra musicians. Through ROPA you can learn how to effectively organize your committees, orchestra, and negotiating team so that you can successfully deal with management and internal problems.

Being a member of ROPA sends a message to your management that you are unified and organized. To quote Lew Waldeck, former Director of the AFM Symphonic Services Division (SSD), "UNITY IS POWER".

As a member, you are provided valuable tools such as surveys, bulletins, newsletters, an Emergency Relief Fund, and an annual Conference.

## **WHAT ROPA HAS TO OFFER**

### **Internal Communication via Members-At-Large and ROPA Website**

ROPA Members-At-Large will communicate with their assigned Delegates at least four times a year. These calls are a vital networking tool that allows the ROPA Board to assist orchestras in need of help. Lines of communication are always open to all ROPA officers. The ROPA website ([www.ropaweb.org](http://www.ropaweb.org)) is where Delegates can find information they need, including contact information and important documents.

### **Roster**

A current listing of all Delegates and Local Union contact information can be found on the ROPA web-site ([www.ropaweb.org](http://www.ropaweb.org)). The roster is located on a password-protected page on the website; contact the ROPA Secretary for the password to this page (which will be different from your website login).

### **ROPA Bulletins**

The latest ROPA orchestra information that announces strikes, lockouts, settlements and any other activity of note that is sent to ROPA Delegates. ROPA bulletins are available on the ROPA web site. (See p. 9)

### **The Leading Tone**

ROPA's newsletter is published four times a year to report on important events and to offer articles of interest. All members are encouraged to submit articles for the newsletter. (See p. 8)

### **Player Conference Council**

This is a committee consisting of representatives from ROPA, ICSOM, OCSM, RMA, and TMA . This committee has further broadened our lines of communication, as all organizations share bulletins, newsletters, and other pertinent information. PCC members are in constant

communication and meet annually to ensure total communication between all of the performing musicians' organizations.

### **Conductor Evaluation Bank**

Full member orchestras have access to musicians' evaluations of Music Directors, Assistant Conductors, and Guest Conductors. The conductor evaluation bank is a useful tool in the process of selecting a conductor. ROPA is a participant in the ICSOM bank as well. (See p.29)

### **Negotiations and General Assistance**

In addition to your Local and the AFM Symphonic Services Division (SSD), any member orchestra may get assistance by calling other Delegates or ROPA officers. The networking and dialogue that occurs within ROPA is an important part of gathering information, problem solving and preparing for negotiations. The annual ROPA Conference provides negotiation workshops for the Delegates, presented by the SSD staff and guest speakers.

### **Electronic Media Committee**

This committee informs and represents member orchestras in the areas of recording, broadcasting, and other forms of electronic media. The committee holds meetings with the other Player Conferences and the Federation to discuss ongoing electronic media issues.

### **Regional Orchestra Emergency Relief Fund**

Every Full Member ROPA Orchestra must join the Regional Orchestra Emergency Relief Fund. [Associate Member Orchestras are not eligible.] The ROPA ERF is a fund which offers financial assistance to ROPA Full Member Orchestras that are suffering through a strike, lockout, or job action. The money is available in the form of interest-free loans to AFM members only. (See p.19)

### **ROPA Legal Advisory Service**

This service is offered at no cost on a limited basis to ROPA Full Member Orchestra Delegates seeking advice from ROPA Counsel. (See p. 18)

## ROPA DELEGATE DUTIES

### **Be Familiar with the Delegate Handbook and the ROPA Bylaws**

#### **Attend the ROPA Conference:**

- Meet with your Orchestra Committee prior to the conference to find out what issues are important to your orchestra.

#### **Contact Information:**

- Maintain current contact information including your e-mail address with ROPA Secretary.
- Notify ROPA Secretary of contact information of a new Delegate, Alternate Delegate, and Local President.
- Maintain a current e-list of your orchestra and forward important ROPA orchestra information to your musicians.

### **Maintain contact with your assigned elected ROPA Board Member at Large (MAL).**

- Notify MAL of important issues such as grievances, contract re-openers, and financial difficulties, or questions or concerns.
- Report detailed information about your orchestra to your MAL. You will receive a list of questions from your MAL and later a phone call four times per season that will assist the ROPA Board in maintaining the current status of your orchestra.

### **Supply the following information to the ROPA Executive Board:**

- Settlement Bulletin to the ROPA Secretary (See p. 9).
- Conductor Evaluation Reports to the Conductor Evaluation Bank Administrator.
- Electronic copy of your Master Agreement to the ROPA Secretary.
- Submit essays and articles of interest for the Leading Tone to the Leading Tone Editor.
- Prepare an orchestra report for the conference and submit to ROPA Secretary. (See p. 12) This report will be discussed during the conference MAL breakout groups. In special cases you may be asked to give an oral report to the ROPA Delegates during the annual conference.
- Submit ROPA dues to ROPA Treasurer by December 31. Collect ROPA dues, Emergency Relief Fund dues, and special assessments or contributions, or verify that proper payroll deduction has been made and sent to ROPA. (See p. 16)

### **Supply the following to your orchestra musicians:**

- The Leading Tone newsletter.
- ROPA Settlement Bulletins.
- A written and oral report on the annual ROPA Conference to your orchestra and to your Local Officers.
- Important information that includes legislative activities by the AFM or United States Government that could impact their work.

### **Supply the following to the AFM Symphonic Services Division (SSD):**

- Compile and enter the Wage and Scale Chart Data. (See p. 17)

**Network with other ROPA orchestras:**

- Maintain a subscription to the ROPA e-list (<http://groups.google.com/group/ropa-discussion>) and the ROPA Delegate e-list (<http://groups.google.com/group/ropa-delegates-discussion>) (See p. 10 & 11)
- Register and receive a password for the ROPA website ([ropaweb.org](http://ropaweb.org)).
- Answer and post inquiries on the Delegate e-list.
- Post articles and industry information on the ROPA e-list.
- Submit letters of support to orchestras in difficult circumstances and collect and forward funds for orchestras in need.

**HOW TO SUBMIT ARTICLES FOR *THE LEADING TONE***

The Leading Tone Editor will set deadlines for each issue. E-mail your article to the Leading Tone Editor in plain text or as a Microsoft Word attachment by the announced deadline. Avoid using unnecessary formatting, and recognize that there may be minor changes to your article during the editing process.

Whenever you have a choice, go with clarity and precision. For tips on writing your article, refer to *The Elements of Style* by William Strunk Jr. and E. B. White, and *The Associated Press Guide to News Writing* by Rene J. Cappon.



## ROPA SETTLEMENT BULLETINS

A ROPA bulletin is an announcement to ROPA and ICSOM Delegates of a ratified agreement, any job action including a strike and any other activity of note. E-mail the completed bulletin to the ROPA Secretary.

ROPA Bulletins should contain the following information:

Orchestra Name

Delegate Name

Ratification Date; Expiration Date

Term of Agreement: include number of years; dates

List if the contract is Per-service or Salary

Wage details for each year of the contract and the last year of the previous contract

Number of guaranteed services

Number of weeks in season

Include four to five of the most substantial changes in the contract such as tenure, pension, benefit changes, working conditions, or media guarantee

Names of Negotiating Committee, names of participating Local Officers and Local President, Legal Counsel, SSD Negotiator, and others instrumental in the negotiation. **See Sample Bulletin Below**

### Omaha Symphony

Settlement Bulletin

Karen Sandene, Delegate

Ratified: 2/8/08 Terms: 2 years Begins: 7/1/2007 Expires: 6/30/2009 Pay Type: Salary/Per-service

<u>First Tier</u>	<u>Section Pay</u>	<u>% Increase</u>	<u>Weeks</u>	<u>Per Service Rate</u>	<u>Service #</u>
<b>Previous Year</b>	\$29,177	x	38	\$101.41	106/61
<b>1st Year (2007-08)</b>	\$30,344.08	4%	38	\$105.47	106/61
<b>2nd Year (2008-09)</b>	\$31,254.40	3%	38	\$108.63	106/61

- Signing bonus - 1.5% in 2007/2008 and 1% in 2008/2009
- Increases in health care benefits paid to musicians, 10.6% first year, 11.1% 2nd year
- Increase in management's contribution to instrument insurance premiums
- Improved travel allowance
- Fewer mandatory daytime services for per-service players

**Special Thanks to:**

Negotiating Committee: Craig Fuller, Karen Sandene, Leslie Carter, Thomas Kluge, & Rich Jones

Local 70- 558 Secretary Dan Cervený and President Chris Acker

SSD Negotiator: Chris Durham

## ROPA INTERNET MAILING LIST

### Policy Statement

The ROPA Internet Mailing List is intended to serve as an electronic forum for issues pertaining to the orchestra industry. Participating members use the mailing list to share information regarding the orchestra industry, and to post information of interest to ROPA orchestra members.

The ROPA Internet Mailing List is open to all members of a ROPA orchestra, both full and associate. Persons affiliated with a ROPA orchestra, such as a Local officer, and interested persons affiliated with one of the other Player Conferences (ICSOM, OCSM, RMA, and TMA) will also be granted access to the email bulletin board, as will AFM staff members. Additionally, the ROPA Executive Board may grant access to other individuals who are interested in furthering the goals of ROPA.

The ROPA Executive Board retains the right to deny access to any person who abuses the privilege of accessing the ROPA Internet mailing list. Abuse shall be considered using the mailing list for a purpose other than that stated above. In particular, posting inflammatory language or using the mailing list for commercial purposes shall be considered abuse. Common courtesy and professional behavior are expected from all authorized users.

The mailing list administrator shall notify an individual when the ROPA Executive Board determines that the individual is abusing the mailing list. If the individual does not alter his/her behavior immediately upon receiving a warning the administrator will remove the individual from the list of authorized users.

The ROPA Executive Board reserves the right to amend or change this policy statement without prior notice.

### Administrative Information

List address: <http://groups.google.com/group/ropa-discussion>

To send email to all subscribers, address your message to [ropa-discussion@googlegroups.com](mailto:ropa-discussion@googlegroups.com)

Administrative address: [regionalorchestra@gmail.com](mailto:regionalorchestra@gmail.com)

To subscribe, unsubscribe, or change your email address, send an email to the ROPA Secretary or go to the ROPA website ([www.ropaweb.org](http://www.ropaweb.org)) and click on the "Get in Touch" button and leave a message. Be sure to mention the name of your orchestra, or AFM staff/officer title. If we don't recognize your name or orchestra, we will not be able to add you to the mailing list. You may also go to the link <http://groups.google.com/group/ropa-discussion>, and click on "Contact the Owner" to leave a message

Before you begin posting messages to the list, please review the generally accepted principles of Netiquette. There are many websites that discuss rules for internet etiquette; <http://www.albion.com/netiquette/corerules.html> is one such site. Even seasoned Internet travelers can sometimes use a refresher.

If you have any questions, send email to the ROPA Secretary.

## ROPA DELEGATES INTERNET MAILING LIST

Delegates use this mailing list to network exclusively with all the ROPA Delegates and the ROPA Board. This list is used to compare contract language and to conduct surveys about conditions or circumstances in other ROPA orchestras.

List address: <http://groups.google.com/group/ropa-delegates-discussion>

To send email to all Delegates, address your message to [ropa-delegates-discussion@googlegroups.com](mailto:ropa-delegates-discussion@googlegroups.com)

Administrative address: [-ropawebmaster@gmail.com](mailto:-ropawebmaster@gmail.com)

To subscribe, unsubscribe, or change your email address, send an email to the ROPA Secretary or go to the ROPA website ([www.ropaweb.org](http://www.ropaweb.org)) and click on the “Get in Touch” button and leave a message. Be sure to mention the name of your orchestra. If we don’t recognize your name or orchestra, we will not be able to add you to the mailing list. You may also go to the link <http://groups.google.com/group/ropa-delegates-discussion> and click on “Contact the Owner” to leave a message.

Before you begin posting messages to the list, please review the generally accepted principles of Netiquette. There are many websites that discuss rules for internet etiquette; <http://www.albion.com/netiquette/corerules.html> is one such site. Even seasoned Internet travelers can sometimes use a refresher.

If you have any questions, send email to the ROPA Secretary.

## ROPA CONFERENCE

Each summer the ROPA Board organizes a conference in a ROPA Orchestra city. Each conference is hosted by a ROPA orchestra and its Local. All ROPA orchestras must have representation at the conference.

### Preparation for the Conference

- Each Delegate should meet with his/her AFM Local Officers, inform them of the projected expenses of attending the conference, and request funding. The AFM bylaws provide that the AFM Local is responsible for covering a Delegate's conference expenses.
- Delegates must prepare a one-page report on their orchestra's demographics and highlights. This should be e-mailed to the ROPA Secretary by the designated deadline.

### Orchestra Report Instructions

Please include the following information in your report to the conference:

1. Orchestra
2. Delegate Name
3. Orchestra Demographics: Season Length, budget, number of musicians, number of guaranteed services, service rate, list of the concerts performed.
4. Description of the orchestra
5. Year in review: Include notable events: contract settlements highlights, grievances, awards, fundraising accomplishments, recordings.

See Sample Report Below:

**Spokane Symphony/Report to the ROPA Conference, August 2008**

Greg Youmans- delegate/Leonard Byrne- alternate

Season Length:	38 weeks	Concerts:	10 Classics (2 nights)
Budget:	4.3 million		6 Super Pops
# of Musicians:	36 Core	180 services	3 Chamber Orchestra
	and guarantee 11 Reduced	125 services	3 Small Ens. (3 nights)
	22 Full	87 services	2 Nightclub Venue
	5 Aux.	No guarantee	Nutcracker-5,
Service Rate:	\$122.89 Princ.	\$104.8Asst. Princ.	\$97.00 Section
			Community Specials & Educational Concerts

**DESCRIPTION**

The Spokane Symphony serves Spokane and the surrounding area. Spokane is in eastern Washington on the Idaho border. The metropolitan population is 625K, but the region as a whole is rural and lightly populated.

**YEAR IN REVIEW**

The most notable event of the '07-08' season was the opening of our new home, the Martin Woldson theater at the Fox, a newly renovated 1931 art-deco Fox grand theater. Musicians and audiences alike are pleased with the much-improved acoustics.

The Spokane Symphony was chosen to participate in round 3 of the Mellon Foundation's New Strategies Lab. The Symphony's proposal involved utilizing the technological capabilities built into the Fox Theater. The inaugural event was utilizing guest soloist Ann Akiko Meyer to teach a remote Internet master class. The Symphony plans to expand upon Internet use with several other events scheduled in 08-09.

We have completed year two of a four-year contract. This season included an increase of 10 guaranteed services for B and C, reflecting double performances of classics concerts in the smaller hall; and an increase of 18 services in tier A. The next two seasons will feature further increases in tier A only, which will also correspond with an increase in the allowable day time services, as the Symphony endeavors to utilize opportunities presented by the new hall, and to bring the salary up to the sustainable wage level (formerly known as the poverty line).

We had nine vacant seats to fill by season's end, an unusually high number, which included our long time personnel manager.

We filed one grievance over a tenure issue that was resolved favorably before it went to arbitration. Two issues regarding leave and sick pay were resolved prior to filing.

The final event of the season continued the Symphony's relationship with the Spokane Indian Tribe, with a community activity day followed by a concert in which the Symphony shared the program with native singers and drummers and premiered a commissioned piece based on an Indian chant.

Player morale seems generally good due to the growth and the new hall. The '08 budget appears near or in the black as we enter a new era with a new concert hall, the Martin Woldson Theater at the Fox.

\*\*\*\*\*

## ROPA Delegate Handbook 2016

- Delegates are responsible for making their own travel arrangements and hotel reservations.
- New Delegates must attend the new delegate orientation session.
- Each Delegate will participate in a small break-out session and will be provided the opportunity to give a short report to the orchestras attending their session hosted by their assigned Member at Large ROPA board representative.
- Delegates should take detailed notes of the conference to assist them in preparing an oral and written report of the conference to their orchestra and their Local Officers. A fifteen-minute oral report about the conference should be scheduled for both your orchestra and your local at a regularly scheduled meeting. These reports are crucial for maintaining the connection between ROPA, your orchestra, and your Local. Make sure to highlight what you have learned at the conference and in particular, the issues that impact your orchestra.

The following guidelines for minutes were provided by Richard Totusek. These rules and guidelines will assist you in your note taking for your conference report to your orchestra and to your Local Officers.

### **Rules**

1. Write in complete sentences.
2. Record what was done, not what was said.
3. Make no editorial comment either in tone or in word.
4. Follow the time sequence of the meeting.
5. Do not record the debate.
6. Record all motions as decided (with amendments), with the name of the maker, and the result of the vote.
7. If a vote is counted, record the actual count.

### **Guidelines**

1. Use the active voice whenever possible, e.g., "President Jones called the meeting to order,"  
instead of "The meeting was called to order by President Jones."
  2. Use the third person when referring to yourself, e.g., "Secretary Smith made a motion to recess for ten minutes."
- Consider submitting a resolution at the annual conference.
  - Consider hosting a conference.

## HOSTING A ROPA CONFERENCE

Orchestras interested in hosting the next ROPA Conference will be given time for a short presentation at this Conference. We suggest you provide a hotel brochure(s) showing the conference facilities with your presentation.

**Official Invitation and Commitment** - The official invitation to host the annual ROPA conference must come from the member orchestra's committee and the Local. The invitation should include a commitment from the orchestra committee to: have a substantial percentage of the orchestra attend at least one session of the conference, assist in putting on a public labor event if local circumstances make that desirable, and have a corps of volunteers to help before, during, and after the conference.

**Basics**- The hotel should be a union hotel if possible. The location of the hotel should be central or near sites of interest to attendees. Ground transport from airport to hotel should be convenient and reasonably priced.

**Guest rooms**- The hotel should have an adequate number of rooms, reasonably priced (preferably under \$100 before any local taxes), to accommodate all attendees. About 100 people customarily attend on official business, and family members and others usually brings the total to 120.

### **Hotel Needs:**

**Conference Room**- The conference room should seat 100 people comfortably; this usually requires at least 2000 square feet. Sightlines should be unobstructed; watch out for columns and irregular walls. The conference room should be exclusively for ROPA's use during the conference and available for general sessions, large caucuses, and workshops.

**Audio-Visual Needs**- Participants should be able to hear each other when they speak; that usually requires a sound system, either in-house or rented, with microphones easily accessed.

**Executive Board Meeting Room**- The Executive Board requires a room that can seat up to 16 people comfortably for meetings. The room may be needed for other meetings during the conference.

**Office**- A room near the conference room is needed for office supplies and paper distribution. Office equipment appliances (computer, printer, copier) require suitable outlets.

**Hospitality Suite**- A large comfortable room where delegates can meet informally is customary. The room should have a refrigerator. ROPA should be allowed to stock the room with drinks and snacks, but the hotel may require that its own food and beverage service be used. In either case, the host and volunteers should see that the room remains stocked.

### **Local Requirements:**

**Copier**- Provision must be made to expedite copy work by renting or borrowing a copy machine for the Conference Office, to be used by the Executive Board.

**Social Event**- There is usually a social event, hosted by the Local, held in conjunction with the Conference. This is not a mandatory requirement but highly recommended.

## ROPA DUES

Annual ROPA Dues for the each fiscal year (July 1 - June 30) for Full Member Orchestras is \$680.00 plus an additional \$100.00 for the annual contribution to the ROPA Emergency Relief Fund (ERF) for a grand total of \$780.00.

Annual ROPA Dues for the each fiscal year (July 1 - June 30) for Associate Member Orchestras is \$200. Associate Member Orchestras are not eligible to receive benefits from the ROPA Emergency Relief Fund.

This payment is due no later than **December 31** with the entire check made payable to ROPA.

Send your check to the ROPA Treasurer. See <http://ropaweb.org/about/executive-board-committees/about-the-ropa-treasurer/> for mailing address information.

Please note that if your Local is in charge of paying your annual ROPA dues, you (the ROPA Delegate) are responsible for seeing that these dues are properly remitted to ROPA. Late fees will be assessed to any orchestra whose Annual Dues (and ERF) is received after December 31. Late fees shall be calculated as follows:

<b>Dues Paid On or After</b>	<b>But Prior To</b>	<b>Late Fee Shall Be</b>
January 1	February 1	\$ 5.00
February 1	March 1	\$ 10.00
March 1	April 1	\$ 20.00
April 1	May 1	\$ 30.00
May 1	June 1	\$ 40.00
June 1	July 1	\$ 60.00
July 1	August 1	\$ 80.00

If the dues remain unpaid at the end of the Fiscal Year (June 30), the Orchestra shall be expelled from membership and can only be reinstated upon payment of a \$100.00 reinstatement fee, together with all back indebtedness. The Executive Board shall be empowered to grant an extension for payment and/or waive any penalties if, in its opinion, an extraordinary situation requires the same.



## AFM SSD ROPA WAGE AND SCALE CHART

The AFM ROPA Wage and Scale Chart is one of the most valuable comparative data tools used in regional orchestra negotiations. It is up to the delegates to:

1. Know the terms of their collective bargaining agreement (or know who you can ask), so you can verify the information and enter changes.
2. Obtain the answers to employer and local union questions each year. The questions are sent to you via e-mail
3. Register with SSD and enter the information supplied by management and the local union and from your contract in the online application.
4. Distribute the printed wage charts to your orchestra and the online links to your orchestra committee members.

## INFORMATION AND INSTRUCTIONS FOR ENTERING INFORMATION FROM SSD

### Highlights from the [wagechart.afm.org](http://wagechart.afm.org) for new delegates

The wage charts site hosts an innovative, dynamic and interactive database that offers an extraordinary opportunity to analyze the status of each orchestra in the industry and is an important tool for negotiators.

***wagechart.afm.org*** is accessible by AFM members only.

Users must access the site with a fairly new browser (i.e., any of the following versions or greater: Chrome 40, Firefox 39, Internet Explorer 10, Safari 5).

Useful information on how the website works can be found in the **Help** section with **Guidelines** and **Glossaries**.

Current and older charts are posted on [wagechart.afm.org](http://wagechart.afm.org) in the **Wage Charts** section.

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Delegates are responsible for entering data in the Wage Charts by accessing the questionnaire of their own orchestra in the **Delegates** section. **BUT only delegates who pre-registered with me will be able to log into the website!**

In the fall delegates will receive a list of questions to submit respectively to the local and to management. In December the questionnaire will be available online for your updates (until March). It is crucial that delegates and SSD coordinator (Laurence Hofmann) have proper communication. Any small detail is of great importance.

→ **PLEASE enter data ASAP** ← You can access the questionnaire as often as you wish until the closing of the deadline.

Every spring the current seasonal charts are made public in an edited PDF format.

In the few months prior to publication delegates are requested to bring the charts up to date.

Throughout the year the delegates have the option to make selected changes to the charts.

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An especially useful feature of the site is the **Comparative Analysis**.

This section has 2 subsections: Filter by Criteria and Historical Review.

**Filter by Criteria:** Orchestras can be compared with other orchestras using (one or multiple) criteria such as season length, musicians currently employed, orchestra budget, minimum annual salary, minimum weekly salary.

**Historical Review:** the growth of an orchestra can be reviewed going back to the 2009-2010 season. The reports from the searches are presented as tables and graphs. They can be downloaded and/or printed.

For any further questions, please do not hesitate to contact me:

Laurence Hofmann, SSD Contract Administrator

[lhofmann@afm.org](mailto:lhofmann@afm.org)

office (917) 229 0211

## ROPA LEGAL ADVISORY SERVICE

This service is offered at no cost but only on a limited basis to ROPA Full Member Orchestra Delegates seeking advice from ROPA Counsel regarding contract negotiation or grievance issues. It is only available where specifically authorized by the ROPA President. It is intended to provide brief answers or quick advice on limited legal questions. ROPA does not provide ongoing legal representation to Member Orchestras.

Any ongoing assistance by ROPA Counsel for grievance handling, negotiations, or litigation for any individual orchestra will require a separate agreement between the law firm and the involved Local, orchestra or the Orchestra Services Program.

This limited service is being provided at reasonable cost to ROPA. To be fair to all our full member orchestras (and to keep our costs down), follow these guidelines when requesting legal services:

1. Determine if qualified legal advice can be obtained through your Local.
2. Call the SSD at 212-869-1330.
3. If your Local or the SSD cannot answer your question, a ROPA Full Member Orchestra Delegate may approach the ROPA President to receive authorization to make contact with the ROPA Counsel.
4. After the consultation, write a brief summary report to the President describing the problem and the advice received.

This procedure allows our orchestras to use the maximum services available to them. It is essential that requests come directly from a ROPA Full Member Orchestra Delegate to the ROPA President so that you can be identified as an official representative from your orchestra before being authorized to receive the service.

## ROPA EMERGENCY RELIEF FUND

Every ROPA member orchestra (except Associate members) must join the Regional Orchestra Emergency Relief Fund (ERF). Each orchestra must pay \$100 to the ROPA Treasurer by December 31 of each year.

Following are the AFM Bylaws pertaining to the Regional Orchestra Emergency Relief Fund. The American Federation of Musicians Regional Orchestra Emergency Relief Fund shall be administered in accordance with the following terms and conditions:

- Participation in the Fund shall be on a voluntary basis by those ROPA orchestras operating under a collective bargaining agreement, having individual contracts for all players (except casual/extra players) and with budgets of \$1,000,000 or more which, through a majority secret ballot vote by their members, determine to join the Fund. Orchestras not meeting the budgetary requirement cited above may participate in the fund upon approval of the Trustees.
- Each participating orchestra shall be obligated to contribute \$100.00 annually to the Fund to cover the fiscal period from September 1 through August 31, said amount to be paid not later than April 1 of each such fiscal period. In addition, the Federation shall make available to the fund monies up to the amount of \$50,000.00 on a non-interest bearing loan basis, to be repaid at such times and at such amounts as the Trustees determine is consistent with the fiscal soundness of the Fund.
- Non-interest bearing emergency relief loans of up to 20 percent of the funds available as of April 1 of the current year shall be available to participating orchestras that are current in their payments to the Fund. Such loans shall be payable from the Fund only after a strike has been ordered or approved by (1) the players of a participating orchestra acting by at least a majority vote or in accordance with some other established written policy requiring more than a majority vote, (2) the Local Executive Board, and (3) the AFM President's Office. Strike benefits shall also be payable from the fund in the event of a lockout or other serious confrontation with management which, in the opinion of the Trustees, should be considered for emergency relief.
- The ROPA ERF shall be maintained and administrated by five Trustees, consisting of the Secretary-Treasurer of the AFM, the President of ROPA, the Treasurer of ROPA and two additional Trustees named by the International Executive Board of the AFM. The Trustees shall have full power to establish and promulgate rules and regulations for the administration of the fund, shall collect, invest and hold all contributions to the Fund, and shall pay and distribute all payments and loans from that fund. The Trustees are empowered to take all steps appropriate or necessary to see that the ROPA ERF is administrated fairly and in accordance with any applicable laws.

## Policy and Procedures for Distribution and Collection of ROPA-ERF Loans

For AFM members receiving loans from the ROPA-ERF, the Treasurer's Office shall implement the following policy for distribution, collection and/or recovery, effective immediately.

- The Local Union shall notify the ROPA-ERF Administrator in writing that there are AFM members of a ROPA orchestra in need of a ROPA-ERF loan. Non-AFM members are not eligible for loans from the ROPA-ERF.
- The ROPA-ERF Administrator will forward the ERF request to the ROPA ERF Trustees on behalf of the Local Union.
- The AFM Secretary-Treasurer will calculate the funds available as per the AFM Bylaws.
- The ROPA-ERF Trustees will vote on the release of funds for the orchestra in need.
- The ROPA-ERF Administrator will notify the Local Union of the decision of the Trustees.
- If the release of funds has been approved, the Local Union will forward in writing any and all requests for loans from individual AFM members of the orchestra in question.
- The AFM Secretary-Treasurer's office shall send out for signature the ROPA-ERF Promissory Note to each individual AFM member requesting a loan.
- When the signed note is returned to the AFM, the Secretary Treasurer will countersign and return a fully-executed copy to the individual musician and the Local Union for their records.
- A check will be released to the individual musician.
- The Local Union must notify the Secretary-Treasurer's office as well as the ROPA-ERF Administrator with information to assist the Trustees in determining that the job action is resolved.
- The final decision regarding the resolution of the event is determined by the ROPA-ERF Trustees.
- Loans shall be repaid in 12 equal monthly installments commencing on the first day of the month following resolution of the confrontation.
- Twenty days prior to the loan becoming due for installment or lump- sum repayment, the finance department shall notify the member in writing of when the first payment is due, the amount, and the time schedule for future installments (example: 12/10 notice for a 1/1 due date). The members shall receive a copy of his/her promissory note and a ledger sheet follow-up for internal control purposes. Copies of the loan repayment package shall be sent to Symphonic Services Division (SSD) including the ROPA-ERF Administrator, ERF Trustees and the appropriate orchestra representative.
- The AFM Finance Department shall send a reminder notice to the member who is delinquent in his/her payment ten days after the due date requesting immediate payment. (Example: 1/10 notice for a past due payment due 1/1 to be paid upon receipt of delinquency notice).
- A second notice shall be sent to the member who is delinquent thirty days in his/her payment on the due date of the second installment requesting payment of the past due

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and current payment in ten days. (Example: 2/1 notice for two payments due 1/1/ and 2/1 to be paid on 2/10). Copies to SSD and the appropriate orchestra representative.

- A final notice shall be sent by certified mail/RRR to the members who is sixty days delinquent in his/her payments fifteen days after the due date of the second installment demanding all past due payments upon receipt of the final notice. (Example: 2/15 notice for two payments due 1/1/ and 2/1 to be paid upon receipt of the final notice). The member's appropriate orchestra representative and/or local union shall be contacted by SSD for assistance in collecting this debt. Copies will be sent to SSD and ERF Trustees.
- A final demand shall be sent to the member by certified mail/RRR when his/her loan is three months delinquent advising that the loan is in default and repayment of the entire outstanding loan is now required in fifteen days or the matter will be turned over for collection. (Example: 3/1/ notice for repayment in full on 3/15). Copies will be sent to SSD, ERF Trustees, the local union and the appropriate orchestra representative.
- When the loan becomes four months delinquent, it will be turned over for collection. The Secretary-Treasurer office will attempt to file internal union disciplinary charges. Copies will be sent to SSD, Secretary, and Treasurer's offices, ERF Trustees, local union and the appropriate orchestra representative.

## **AMERICAN FEDERATION OF MUSICIANS SYMPHONY-OPERA STRIKE FUND**

Participation in the Fund shall be on a voluntary basis by those groups eligible.

### **Eligibility**

- A Collective Bargaining Agreement providing for a minimum weekly section player salary of at least \$300 and a season of at least 15 weeks of employment. The Trustees are authorized to waive the requirements set forth in (I) and/or increase the minimum salary requirements if, in their judgment, conditions warrant the change.

### **Application**

- Prior to December 1 of any given year, the orchestra committee and the local shall communicate in writing with the AFM indicating interest in joining the Strike Fund. Such communication shall include:
  1. A copy of the current Collective Bargaining Agreement.
  2. The number of musicians in the orchestra.
  3. Proposed number of beneficiary musicians and basis therefore.
- The letter of interest shall be circulated to the Trustees, together with a recommendation from SSD, who shall determine the orchestra's eligibility and the number or definition of beneficiary musicians for that orchestra.
- Upon determination that an orchestra is eligible to join and the determination of the beneficiary musicians, the Trustees may give conditional approval to the application, subject to a vote of the orchestra.
- Upon a secret ballot 2/3rd majority vote of the beneficiary musicians in an orchestra, the Trustees shall automatically approve admission without further discussion unless a Trustee requests that the application be held for further discussion. In such case, a subsequent majority vote of the trustees shall be required to approve the application.
- Once a group has in this manner become a participant in the Fund, it must remain in the Fund.

### **Payment of Strike Fund Dues**

- On or about February 1, the AFM will send a bill to the Local union and player conference delegate, including the number of participants for which premiums are due.
- Each beneficiary musician in a participating orchestra shall contribute annually to the Fund according to the contribution and benefit schedule set forth in Section V, covering a span between September 1 and August 31, and such dues shall be paid no later than April 1 within such span. If the assets of the fund drop below \$1,000,000, each beneficiary musician shall pay an additional 50 percent of his or her contribution as set forth in the schedule for that time span. The annual contribution amount shall thereafter be fixed at 150 percent of the contribution rate set forth in the schedule.
- Once an orchestra has elected to be a participant in the Strike Fund a single check, representing a contribution of the appropriate contribution rate times the total number of

beneficiary musicians in the orchestra, must be forwarded to the SSD on or before April 1. The check shall be made payable to the "AFM Symphony-Opera Strike Fund."

- Accompanying the check shall be a personnel list, which shall provide the full name and address, including zip code of the musician, as well as his/her social security number, union card number and instrument he/she plays.
- If there is a vacancy and the orchestra wishes to maintain the same number of beneficiary musicians, the orchestra committee and Local union will determine how the responsibility for payment of these premiums will be shared among the musicians.
- If a beneficiary musician is on a leave of absence, the musician playing in the position pays the premium. If various musicians share the position, the premium is divided equally between them.
- When a beneficiary musician in one participating orchestra pays his/her Strike Fund premium and then moves to another participating orchestra, he/she shall be responsible for payment of the Strike Fund premium for the new position if the sum has not yet been paid.
- The Local is responsible for collection of the Strike Fund premium for each member orchestra. If the Local is unable to collect from particular individuals, the AFM will be notified. If the money cannot be collected by the AFM, the member shall be subject to disciplinary action under the AFM Bylaws.

## Benefits

- Strike Fund benefits are payable to AFM members in good standing for a strike or lockout provided that:
  - 1) A strike has been ordered or approved by the players of a participating orchestra
  - 2) AND the strike has been ordered or approved by the Local Executive Board
  - 3) AND a strike has been ordered or approved by the International President or Vice President from Canada, as is appropriate.
- Benefits are receivable on or after September 1 following two premium payments to the Strike Fund.
- Benefits shall be paid to the beneficiary musicians on strike or lockout according to the contribution and benefit table set forth in Section V provided, however, that the Trustees may determine that lesser payments, lesser duration or increased payments or duration are necessary or appropriate in order to preserve the fiscal soundness of the Fund or to respond to the individual situation. Benefits shall be paid:
  - 1) Continuously upon commencement, notwithstanding dark weeks which may occurring during the benefit period unless the orchestra votes by two thirds secret ballot majority to suspend payments during dark weeks.
  - 2) For a maximum period of 15 weeks per season when on a strike or locked out.

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3) Up to a maximum of 8 weeks during a stoppage due to bankruptcy or permanent cancellation of a season. If substantive negotiations resume at a later date, benefits shall resume to a total of 15 aggregate weeks.

4) To commence with the second week of a strike or lockout. For Strike Fund purposes, a week is defined as the following:

- (a) A six-day workweek, with one day (i.e., Monday) as a non-performing day.
- (b) Any full week, as defined by the Master Agreement, for which a strike or lock-out continued, would call for benefit entitlement.
- (c) Pro-rating of the weekly benefit amount would take place only for the last week in which the strike ends. The number of days from the day of the week in which the strike begins, through the end of the work stoppage, determines the amount of the benefit payment to be made. The benefit is to be calculated as 1/6 of the weekly amount reached for each day of the final week of the strike or lock out.

5) Processing of benefit payments shall begin one week following the commencement of the work stoppage.

- a) Payments shall be made to the musician holding the chair at the time of the strike.
- b) No payment to musician(s) who, prior to the work stoppage resign from the orchestra or are on a leave of absence.
- c) Part-time players (e.g., orchestras with A/B contracts) who have made contributions to the Fund shall receive the same benefit payment as full time musicians.
- d) If benefits are due and a beneficiary musician is on a leave, the person covering the position collects the benefits. If various musicians cover the chair, the musician(s) losing the work during the work stoppage, on a week by week basis receives the benefit.
- e) If an orchestra makes payments for the full orchestra and then is playing short during the strike, the orchestra is entitled to receive payments as though it had not been playing short. For example, if the full complement of an orchestra is 76 and contributions are paid on 76 musicians, the Strike fund shall make payments to 76 musicians, regardless if, during a strike, the actual number of musicians is less than a full complement. The Local officer, in consultation with the orchestra committee, determines which additional musician(s) should receive that benefit.

### Schedule of Contributions and Benefits

Weekly Salary	Annual Premium	Wkly Benefit 2 <sup>nd</sup> — 4 <sup>th</sup> week	Wkly Benefit 5 <sup>th</sup> — 10 <sup>th</sup> week	Wkly Benefit 11 <sup>th</sup> — 16 <sup>th</sup> week
\$300 to \$599	\$37.50	\$75	\$150	\$225
\$600 to \$749	\$50.00	\$100	\$200	\$300



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\$750 to \$899	\$62.50	\$125	\$250	\$375
\$900 and higher	\$75.00	\$150	\$300	\$450

The Trustees, at their sole discretion, may grant certain exceptions to the schedule of contributions and benefits as set forth below. Any request to the Trustees in this connection must come with a two-thirds majority secret ballot vote of the Orchestra members in support of such request.

a) An orchestra, upon application to join the Fund, may seek permission to participate at a higher benefit and contribution level than that for which it would normally qualify. Once its participation level has been established, however, it may not reduce its level of participation.

b) An orchestra already participating in the Fund at a lower contribution and benefit level may seek permission to upgrade its level. Benefits at the higher level would become available on September 1 of the second calendar year following the year in which the higher level of contribution is effected.

c) An orchestra participating in the Fund prior to September 15, 1999, shall be "grandfathered" and continue its participation at the highest contribution and benefit level. However, if it qualifies, such an orchestra may seek permission - on a one-time-only basis - to downgrade its level of participation.

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## **ROPA Conductor Evaluation Bank**

### **Purpose**

The purpose of the ROPA Conductor Evaluation Bank is to provide a safe method for musicians in member orchestras to objectively evaluate their music directors and guest conductors, and to provide that information to managements in ROPA, ICSOM, and OCSM orchestras without jeopardizing the anonymity of individual musicians and while protecting musicians, ROPA, ICSOM, OCSM, Local Unions, and/or the AFM from any potential legal liability.

### **Cautionary Note**

Each ROPA orchestra depends upon their Delegates to protect the confidentiality and to observe the professional use of conductor evaluations. Any orchestra whose representatives do not respect this trust will be denied further access to this information.

ROPA orchestras must take extreme care in the evaluation of conductors, as the results are confidential and shall not be shared freely. It shall never be shown to the press, the conductor or music director, the board of directors, concert managers, or even to the orchestra at large.

### **Administration of Evaluations**

Only the ROPA Delegate may administer ROPA conductor evaluations. However, in the event that the ROPA Delegate is not available, the Alternate Delegate may pass out and collect the evaluations. Once this has occurred, the Alternate Delegate will deliver the completed evaluations to the ROPA Delegate, who is responsible for processing, which includes 1) collating the results; 2) filling out the Tabulation Form; 3) completing the Summary Form, Conductor Evaluation Report, and Comment Sheet, and mailing these items to the Conductor Evaluation Bank Administrator.

Both the ROPA Delegate and the Alternate Delegate must maintain strict confidentiality in regards to all conductor evaluations. Due to security reasons, under no circumstances will any ROPA evaluations be administered electronically (Survey Monkey, email, etc).

### **Whom to Evaluate**

Conductor evaluations should be administered for all guest conductors who appear with ROPA orchestras. A conductor search year, when multiple guest conductors appear, is an excellent time to gather information for the ROPA Conductor Evaluation bank. In addition, the conducting staff (music director, pops conductor, etc.) of ROPA orchestras should be evaluated every few years.

## Conductor Evaluation 4-Step Checklist

### 1. Preparation

\_\_\_ Print the following from this handbook: Evaluation Form (p 34) and Musician Memo (p 35)

\_\_\_ Make two-sided copies of these two items so that only one sheet is handed to musicians

### 2. Administer the Evaluation

\_\_\_ Hand the memo/evaluation to each musician who performed the concert series (including substitute and extra musicians)

\_\_\_ Collect and store the completed evaluations in a secure location

### 3. Tally the Results

\_\_\_ Print the following from this handbook: Tabulation form (p 36), Conductor Evaluation Report (p 37), and Summary Form (p 38-41). These forms can also be downloaded from the ROPA website.

\_\_\_ Make four copies of the Tabulation form for your use

\_\_\_ Divide the complete evaluations into four stacks, by instrument groups

\_\_\_ Complete one Tabulation form for each stack/instrument group

\_\_\_ Transfer the information from the Tabulation form to the Summary Form

\_\_\_ Fill out the Conductor Evaluation Report

\_\_\_ Type and print any additional comments that were included on the evaluations as a Comment Sheet (NOTE: Remove any inappropriate or identifying remarks)

### 4. Submit to the ROPA Conductor Evaluation Bank

\_\_\_ Mail the completed Conductor Evaluation Report, Summary Form, and Comment Sheet to the Conductor Evaluation Bank Administrator. Contact information can be found on the ROPA website.

\_\_\_ After notification from the Conductor Evaluation Bank Administrator of receipt of these items, destroy all tally sheets and completed evaluations.

REMINDER: The ROPA Alternate Delegate may complete steps 1 and 2 (listed above) if the ROPA Delegate is not available. However, the ROPA Delegate is the only person authorized to complete steps 3 and 4 (listed above).

## **How to Make Use of the Conductor Evaluation Bank**

Access to the ROPA Conductor Evaluation Bank is allowed during a search or contract renewal of conducting staff (music director, pops conductor, etc.). During a search process, this access is intended only when the field of candidates has been narrowed to a short list. Use of the ROPA Conductor Evaluation bank is not intended for viewing the files of all of the candidates who have applied for the position in a search.

**The following five steps must be followed in order to protect ROPA from any potential liability for the distribution of evaluation information.**

1. Management of any ROPA member orchestra that desires to use the conductor evaluation bank must send a release letter, on Symphony stationery, to the ROPA Conductor Evaluation Bank Administrator. A model of this written request is provided on page 29 of this handbook.
2. The Conductor Evaluation Bank Administrator will send a validated copy of all Summary Forms, including Comment Sheets, to the ROPA Delegate.
3. Only the ROPA Delegate shall see the information in the file(s). A verbal summary of the evaluation may be given, in person, to the search committee by the ROPA Delegate.
4. Under no circumstances shall the ROPA Delegate hand the written file(s) to anyone or photocopy the file(s).
5. The file(s) shall remain in the custody of the ROPA Delegate for two weeks, upon which time it shall be returned to the Conductor Evaluation Bank Administrator by the ROPA Delegate.

A model memo from the Conductor Evaluation Bank Administrator to the Delegate is included as page 35 of this handbook and may serve as a summary of these five steps.

## **Using the ICSOM and OCSM Conductor Evaluation Banks**

ROPA has an agreement that allows member orchestras to take advantage of the Conductor Evaluation banks of ICSOM and OCSM. To request file(s) from ICSOM or OCSM, complete the same release letter (provided on page 29 of this handbook) and mail to the Conductor Evaluation Bank Administrator. The cost of these file(s) will be borne by the requesting orchestra. Refer to the information sheet on pages 27 & 28 of this handbook for complete instructions.

## **Using an In-House Evaluation Form**

An orchestra may choose to create a conductor evaluation form for its personal, in-house use only. Such an orchestra shall not use the ROPA form for this purpose. Any use of the ROPA form other than as prescribed in this handbook will be considered a misuse of the form. In addition, such in-house evaluations will not be eligible for inclusion in the ROPA Conductor Evaluation bank.

## **ICSOM and OCSM Conductor Evaluation Data Requests**

ROPA, ICSOM, and OCSM have agreed to allow access to each other's conductor evaluation information. The ROPA conductor evaluation bank will remain in the files of the ROPA Conductor Evaluation Bank Administrator and requested summaries will continue to be in the form of hand-tallied responses. Please continue to use the summary sheet in the Delegate Handbook as you send in conductor evaluations.

The following procedure will be used to request ICSOM conductor evaluations.

1. The orchestra management or board must request the information through the ROPA delegate. This request should be in the form of the model release letter that indemnifies ROPA, ICSOM, and OCSM of indemnity in the event of losses due to misuse of the information.
2. The ROPA delegate will forward to the ROPA Conductor Evaluation Bank Administrator a copy of the initial written request. The delegate will also write a letter requesting the specific information desired.
3. After confirming the validity of the request the ROPA Conductor Evaluation Bank Administrator will contact the ICSOM conductor evaluation administrator.
4. The ICSOM conductor evaluation administrator will then request the release of the information from the computer at Wayne State University.
5. Wayne State will send the information directly to the ROPA delegate.
6. Wayne State will bill the requesting orchestra for any evaluations delivered.

Delegates should not contact Wayne State directly. All requests must come through the ROPA Conductor Evaluation Bank Administrator. The time between sending a request and receiving an evaluation is usually at least two weeks and may be longer, depending on mail service and the workload at Wayne State. Presently the fee is \$2.50 plus postage and handling for each evaluation printed out.

## **Reading ICSOM Evaluation Results**

Numbers following the letter N indicate how many musicians participated in the evaluation or in part of the evaluation indicated. Numbers in a column headed "Mean" indicate the average opinion of those who responded to a statement in the evaluation. The scale may be 1-5 or 1-9, depending on the number of response categories to that statement. As an example, if the mean

of a given statement on the 5-point scale were 1.71, the average response to that statement would be between SA (Strongly Agree) and A (Agree); if the mean were 4.15, the average would be between 0 (Disagree) and SO (Strongly Disagree).

Numbers in a column headed Standard Deviation indicate the range of response. The scale may be 0-4 or 0-8, depending on the number of response categories to that statement. As an example, a standard deviation of 0.58 on a given statement would indicate a small range of response; a standard deviation of 2.67 would indicate a wider range of response, although not necessarily strong divergence of opinion within the orchestra. Numbers in columns headed SA, A, N, 0, SO, or 1-9 are Percentages of the total number of musicians who responded to that category on the form.

The computer program can generate two types of reports:

- an individual report on a given set of evaluations;
- a cumulative history summarizing all sets on a given conductor.

Both types of reports are available to all member orchestras upon proper request. Unless orchestras request orchestra-and-date-specific individual evaluation reports, they receive one cumulative history for each conductor. A cumulative history summarizes all sets of evaluations on a conductor, regardless of the number of sets that have been submitted, the variety of orchestras that submitted evaluations, the number of musicians who participated in evaluations, and any duplication of orchestras. An orchestra concerned that histories may not provide adequate information may contact the Conductor Evaluation Bank Administrator for information about individual reports to supplement cumulative reports.

The following procedure will be used to request OCSM conductor evaluations.

1. The orchestra management or board must request the information through the ROPA delegate. This request should be in the form of the model release letter that indemnifies ROPA, ICSOM, and OCSM of indemnity in the event of losses due to misuse of the information.
2. The ROPA delegate will forward to the Conductor Evaluation Bank Administrator a copy of the initial written request. The delegate will also write a letter requesting the specific information desired.
3. After confirming the validity of the request the Conductor Evaluation Bank Administrator will contact the OCSM conductor evaluation administrator.
4. The OCSM conductor evaluations administrator will send the information directly to the ROPA delegate.
5. The OCSM conductor evaluations administrator will bill the requesting orchestra a fee of \$5 (US dollars) for the first evaluation, \$4 for the second, and the remaining ones \$3 each.

## **Model Letter for Orchestra Management Requesting Conductor Evaluation Data**

Dear ROPA Conductor Evaluation Bank Administrator:

This letter shall confirm our request for the conductor evaluation results for (NAME OF CONDUCTOR(S)).

We request this data for the purpose of (STATE YOUR PURPOSE). We promise to make no other use of this material than that set forth herein, and we understand that it is given to us on that basis only.

We agree that we will not show the material, nor reveal its contents, to anyone outside the management and board of this organization, including the media, nor will copies be made of this data.

In the event that you, the Union, ROPA or OCSM suffer any loss or damage as a result of our breach of the above assurances, we agree to indemnify and hold you harmless therefore.

In addition, we understand that our ROPA Delegate will need to return the borrowed evaluations from the bank to you within two weeks.

Very truly yours,

(ORCHESTRA MANAGEMENT)



## Summary Form

1. Keep one blank copy available at all times so that you can duplicate when necessary.
2. Sort the responses into four instrument groups.
3. Going through the responses one instrument-group at a time, count the number of responses to each question in each category and enter on the form.
4. Total the number of responses in each category and enter under "Total."
5. After the initial question, the numbers 1-5 correspond with the instrumentation that is first given.
6. Mail the final completed form to the Conductor Evaluation Bank Administrator.

It might be best to use a worksheet to do the initial counting.

EXAMPLE: 2. (a) Has a thorough knowledge...


		Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Violins.	1.	10	4	2	15	8
Vla/Vc/CB	2.	8	6	1	10	5
Woodwinds	3.	1	0	4	4	3
Brass/Perc	4.	3	1	0	8	3
Total	5.	22	11	7	37	19

PLEASE REMEMBER THAT ALL INFORMATION IS CONFIDENTIAL AND THAT TO CONTINUE THE ROPA BANK WE MUST DEMONSTRATE A HIGH DEGREE OF RESPONSIBILITY.

RESULTS OF THESE EVALUATIONS SHOULD NOT BE SHOWN TO THE ORCHESTRA, THE CONDUCTOR, THE MANAGEMENT, OR ANYONE ELSE. RESULTS OF THESE EVALUATIONS SHOULD ONLY BE SENT TO THE CONDUCTOR EVALUATION BANK ADMINISTRATOR.

## Conductor Evaluation Form

Name of Conductor \_\_\_\_\_

	N/A	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree		
1. This conductor...								
a... has a thorough <u>knowledge</u> of the scores conducted	0	0	0	0	0	0		
b...is able to communicate the <u>emotional content</u> of the music	0	0	0	0	0	0		
c...demonstrates excellent <u>baton technique</u>	0	0	0	0	0	0		
d...chooses excellent tempi	0	0	0	0	0	0		
e...corrects faulty <u>intonation</u>	0	0	0	0	0	0		
f...corrects faulty <u>balance</u> among instrumental groups	0	0	0	0	0	0		
g...is a sensitive <u>accompanist</u>	0	0	0	0	0	0		
h...makes <u>efficient</u> use of rehearsal time	0	0	0	0	0	0		
i...makes <u>remarks</u> that are understandable and effective	0	0	0	0	0	0		
j...leads rehearsal in a <u>tactful</u> , respectful way	0	0	0	0	0	0		
k...achieves excellent <u>performances</u>	0	0	0	0	0	0		
l...based on above criteria should be considered for <u>re-engagement</u>	0	0	0	0	0	0		
2. What is your overall opinion of the conductor?								
EXCELLENT	VERY GOOD	GOOD	ABOVE AVERAGE	AVERAGE	BELOW AVERAGE	POOR	VERY POOR	UNACCEPTABLE
0	0	0	0	0	0	0	0	0
3. Please indicate your instrument group:								
VIOLINS I & II	VIOLA, CELLO, BASS		WOODWINDS		BRASS, PERCUSSION, HARP, KEYBOARD			
0	0		0		0			
ANSWER BLANKS FOR OPTIONAL QUESTIONS (IF NEEDED BY YOUR ORCHESTRA)								
4. 0 0 0 0 0	5. 0 0 0 0 0	6. 0 0 0 0 0	7. 0 0 0 0 0	8. 0 0 0 0 0				

## Memo to Musicians

To: \_\_\_\_\_ Musicians

*(Orchestra)*

From: \_\_\_\_\_ ROPA Representative

*(Delegate Name)*

Date: \_\_\_\_\_

**Subject:** Conductor Evaluation Form

As many of you know, the Regional Orchestra Players' Association (ROPA) maintains a database of conductor evaluations done by all ROPA orchestras. All ROPA orchestras have been requested to evaluate all guest conductors as well as their own Music Director.

Please complete the attached form for \_\_\_\_\_ and return

*(Conductor's Name)*

it to me at this week's concert. Or if you prefer, you can mail it to me within one week of the concert at:

\_\_\_\_\_

*(Delegate Name)*

\_\_\_\_\_

*(Street)*

\_\_\_\_\_

*(City, State Zip)*

Thanks in advance for your participation.

## ROPA Conductor Evaluation Tabulation Form

Sort the survey responses by the answer to question 3, Instrument Group. Make copies of this tabulation form for each instrument group. Once you have tabulated the separate families, use the Summary Form to add the totals.

**Instrument Group (circle one)**

1. Violins I & II      2. Viola/Cello/Bass      3. Woodwinds      4. Brass/Percussion/Keyboard/Harp

Question 1: Abilities

#	N/A	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
a						
b						
c						
d						
e						
f						
g						
h						
i						
j						
k						
l						

Question 2: Overall Opinion

Excellent	Very Good	Good	Above Average	Average
Below Average	Poor	Very Poor	Unacceptable	

## Conductor Evaluation Report

INCLUDE NAME OF CONDUCTOR, ORCHESTRA, DATES

PLEASE PRINT CLEARLY USING BLACK INK

Delegate Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Phone \_\_\_\_\_  
E-mail \_\_\_\_\_  
Orchestra \_\_\_\_\_

### Conductor Information

Name (first and last) \_\_\_\_\_

Current position with above orchestra (circle one)

1. Music Director
2. Music Advisor
3. Guest Conductor
4. Associate/Resident Conductor
5. Assistant Conductor
6. Principal Pops Conductor
7. Guest Pops Conductor

### Program Information

Performance Dates \_\_\_\_\_

Repertoire (circle all that apply)

1. Baroque
2. Classical
3. Romantic
4. Early 20<sup>th</sup> Century
5. Mid-Late 20<sup>th</sup> Century
6. Pop/Jazz
7. Opera (at least one full act)
8. Early 21<sup>st</sup> Century
9. Other \_\_\_\_\_

### Additional Information:

## ROPA Conductor Evaluation Summary Form

INCLUDE NAME OF CONDUCTOR, ORCHESTRA, DATES

Name of Conductor \_\_\_\_\_

Orchestra \_\_\_\_\_ Dates \_\_\_\_\_

	N/A	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>a. has a thorough knowledge of the scores conducted</b>						
Violins						
Lower strings						
Woodwinds						
Brass, percussion, keyboard, harp						
TOTALS						
<b>b. is able to communicate the emotional content of the music</b>						
Violins						
Lower strings						
Woodwinds						
Brass, percussion, keyboard, harp						
TOTALS						
<b>c. demonstrates excellent baton technique</b>						
Violins						
Lower strings						
Woodwinds						
Brass, percussion, keyboard, harp						
TOTALS						
<b>d. chooses excellent tempi</b>						
Violins						
Lower strings						
Woodwinds						
Brass, percussion, keyboard, harp						
TOTALS						

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	N/A	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>e. corrects faulty intonation</b>						
Violins						
Lower strings						
Woodwinds						
Brass, percussion, keyboard, harp						
TOTALS						
<b>f. corrects faulty balance among instrument groups</b>						
Violins						
Lower strings						
Woodwinds						
Brass, percussion, keyboard, harp						
TOTALS						
<b>g. Is a sensitive accompanist</b>						
Violins						
Lower strings						
Woodwinds						
Brass, percussion, keyboard, harp						
TOTALS						
<b>h. makes efficient use of rehearsal time</b>						
Violins						
Lower strings						
Woodwinds						
Brass, percussion, keyboard, harp						
TOTALS						

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	N/A	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>i. makes remarks that are understandable and effective</b>						
Violins						
Lower strings						
Woodwinds						
Brass, percussion, keyboard, harp						
<b>TOTALS</b>						
<b>j. leads rehearsals in a tactful, respectful way</b>						
Violins						
Lower strings						
Woodwinds						
Brass, percussion, keyboard, harp						
<b>TOTALS</b>						
<b>k. achieves excellent performances</b>						
Violins						
Lower strings						
Woodwinds						
Brass, percussion, keyboard, harp						
<b>TOTALS</b>						
<b>l. based on the above criteria, should be invited back</b>						
Violins						
Lower strings						
Woodwinds						
Brass, percussion, keyboard, harp						
<b>TOTALS</b>						



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<b>2. Overall Opinion</b>	<b>Exclnt</b>	<b>V Good</b>	<b>Good</b>	<b>Abv Avg</b>	<b>Avg</b>	<b>Blw Avg</b>	<b>Poor</b>	<b>V Poor</b>	<b>Unacct</b>
<b>Violins</b>									
Vla/Vc/Vb									
Woodwinds									
Brass, perc., kbd., hp.									
<b>TOTALS</b>									

**Model Memo from ROPA Conductor Evaluation Bank Administrator to ROPA Delegate**

January 3, 2009

Dear Delegate of XYZ Philharmonic,

On January 2, 2009, I received a request from the management of the XYZ Philharmonic for files from ROPA's Conductor Evaluation bank for three conductors who have applied for the Music Director position in your orchestra.

Enclosed are the files for two of these conductors:

Claude Conductor (ABC Symphony, 11/2010)

Mary Maestro (DEF Opera, 11/2011 and 02/2012)

The other conductor on the list did not have any evaluations from ROPA orchestras in our Conductor Evaluation bank.

I have notified the Conductor Evaluation Administrator for ICSOM, who will contact Wayne State University on our behalf to honor your request for evaluations from their data base.

As a reminder, we ask the following of you in order to maintain the confidentiality of these files:

1. They do not leave your possession.
2. You may share the results with the search committee members in person, not in writing.
3. The files may not be photocopied or reproduced in any way.

**Please return these files to me, at the address above, by Month Date, 20XX.**

Contact me with any questions that you may have, and best wishes for your Music Director search.

In solidarity,

Conductor Evaluation Bank Administrator

## CODE OF ETHICAL AUDITION PRACTICES APPROVED BY THE ORCHESTRA AND MANAGEMENT CONFERENCES

AFM *International Musician*, August 1996

*The following code of ethical audition practices, approved in 1984 by the International Conference of Symphony and Opera Musicians (ICSOM), the Major Orchestra Managers Conference (MOMC) and the AFM, is a document of suggested procedure for management and orchestra musicians alike. As with all codes of ethics, it is not a contract; no one is involuntarily bound to it and it contains no provisions for punitive action. Those who endorsed it have maintained that they will conduct their auditions in accordance with the principles articulated therein, with the tacit assertion that they think others should do likewise. The Code of Ethics was conceived and formulated by the Major Managers-ICSOM liaison Committee, constituting the first time that both ICSOM and MOMC have acted in concert rather than autonomously in addressing such a major issue. In the belief that the Code may be improved over time, it includes a provision for regular review by a joint committee of representatives from the three endorsing organizations. The Code has also been approved by the Regional Orchestra Players' Association (ROPA) and the Regional Orchestra Managers' Conference (ROMC). A similar code exists in Canada between OCSM and the Association of Canadian Orchestras.*

### **Purpose and Scope of Code**

It is of utmost importance to musicians, managers and conductors that auditions be conducted in accordance with guidelines ensuring competition that is fair to all who audition while providing the best results for orchestras seeking musicians. Therefore, the AFM, ICSOM and MOMC propound the following ethical and fair audition practices to which all parties should adhere, subject to local contractual consideration.

### **Preparation for Auditions**

1. Notices of auditions should be given only for genuine vacancies, including newly created positions, which the management intends to fill as a result of those auditions, with no predeterminations having been made as to who will be hired. Musicians taking such auditions should only do so with the intention of accepting the position if it is offered.
2. Auditions should be advertised in appropriate places, including the *International Musician*. Notices should be clear and complete, specifying the position intended to be filled by the auditions, the person to contact in response to the notice and the dates that applications are due and that auditions should be held. Notices should appear far enough in advance of auditions for interested musicians to apply and adequately prepare.
3. All applicants should be sent written responses to their applications. Invited applicants should be sent clear instructions setting forth the date, time and place of the audition, the complete audition repertoire (excluding sight-reading repertoire) and parts for announced excerpts not generally available. All parts supplied by the orchestra should be legible and identical for all candidates.

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

## Conduct of Auditions

1. In preparing for and conducting auditions, all participants should be aware of policies and procedure governing those auditions, including this code.
2. Although the existence and composition of an audition committee and the nature and extent of its participation in auditioning and hiring is determined locally, musicians' involvement should at least include the initial screening of applicants.
3. Applicants should not be disqualified from an audition on the basis of information about them obtained from current or previous employers or from other institutions to which they have applied.
4. Auditionees should be given sufficient time and, to the extent possible, adequate private facilities in which to warm up and practice.
5. Parts supplied by the orchestra for auditions should be in good condition, legible and clearly marked as intended to be played at the audition.
6. There should be no discrimination on the basis of race, sex, age, creed, national origin, religion or sexual preference; steps ensuring this should exist in all phases of the audition process.
7. There should be reasonable accommodation for the handicapped.
8. Auditionees should be given opportunity and encouragement to comment, anonymously if desired, to the audition committee and management about the audition process.
9. Auditionees should be notified of their status in the audition process immediately upon such determination. Candidates under active consideration after auditions are completed should be so notified and given an estimated time of final decision.
10. Auditionees should be informed prior to auditions of the orchestra's policy regarding reimbursement of auditionees' expenses for additional stay or travel incurred at the request of management.

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**OSP AND RELATED ISSUES**

Some Straight Answers

**1. Why was the Orchestra Services Program (OSP) created?**

The Delegates to the 1987 AFM Convention passed Resolutions requested by ICSOM which guarantee certain rights and services to symphony musicians. OSP is part of the policies and procedures established by the International Executive Board (IEB) to be certain that these guarantees may not be ignored for any orchestra.

**2. What other policies and procedures were included in the IEB's action?**

The IEB defined the union's responsibility to include administration of the Contract as well as actual negotiation. It also set up a mechanism to handle grievances from orchestras that did not receive proper services from their Local.

**3. What circumstances could lead to placing an orchestra in OSP?**

When an orchestra is made a part of OSP, the Local essentially steps aside and hires the Federation to provide (and pay for) all the services to which the orchestra players are entitled. This makes available adequate funding and expertise to deal with the orchestra's needs and bypasses any conflict between the orchestra and the Local.

**4. How does OSP solve these situations?**

Essentially, OSP can address any situation in which an orchestra does not receive satisfactory services from its Local. This can result from financial inability, lack of symphonic expertise, bad will or conflict between the orchestra and the Local administration, or any combination of these and/or other factors.

**5. What is the cost to the Local for OSP?**

The Local pays an amount equal to 1% of the scale wages of the orchestra in addition to the 1/2% Federation Work Dues already paid, a total of 1-1/2%.

**6. What does OSP provide to an affiliated orchestra?**

OSP provides all costs and services necessary for the formal negotiation of the orchestra's Master Contract (including attorney's fees) and costs and services necessary to administer the contract (including grievances and deviation requests). It reimburses all expenses incurred locally to administer the contract for such items as postage, printing, and telephone calls. It pays the cost of sending a delegate to the annual player conference meeting. Other costs (such as stipends to members of the Orchestra Committee, Strike Fund payments, or other items appropriate to the particular situation) may also be authorized.

**7. How can the Federation work with an orchestra at such a distance?**

To the extent possible, services will be provided on site. A shop steward (of the orchestra's choice) will be on hand with the authority to deal with routine matters and work with the Orchestra Committee. Problems requiring consultation with the Federation should take no more time (maybe less) than they would if they were channeled through the Local. If needed, it is possible for a Federation representative to be on the spot within 24 hours.

**8. How independent will the orchestra be under OSP?**

It is the policy, desire, and duty of the AFM to represent its members, not to repress them (a Local practice contrary to this can be reason for invoking the OSP in the first place!) The

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orchestra determines its own needs and desires on all matters internal to its local situation, and the Federation supports and implements them. Only in matters of Federation-wide impact must the wish of the individual orchestra yield to the greater common interest as it must with or without OSP, and as it would even if a "shop Local" were to become a possibility.

### **9. Why doesn't the AFM simply give orchestras their own "shop Locals?"**

Current Federation Bylaws do not allow for the establishment of "shop Locals." Only a Convention could make such a structural change. Moreover, "shop Locals" may not be in the best interest of orchestras. Almost every advantage of a "shop Local" is already present in OSP, together with some additional advantages and the elimination of some disadvantages.

### **10. How does OSP give an orchestra the advantages of a "shop Local?"**

Under OSP, the orchestra works directly with the Federation, exercising essential autonomy over its own local affairs, precisely as a "shop Local" would.

### **11. What strengths does OSP have over a "shop Local" situation?**

The services and financial support needed by an orchestra are guaranteed under OSP. In the event, for instance, of a prolonged work stoppage, the orchestra would have behind it the total financial and personnel resources of the AFM. The flow of services and monies into the orchestra could far exceed the dues paid, and guarantee success in a situation that would break a Local standard or "shop."

### **12. What disadvantages of a "shop Local" does OSP avoid?**

Inasmuch as orchestra players under OSP are also full members of their area Local, those who wish to do any playing outside of the orchestra would not need to belong to and pay dues to two separate Locals. The orchestra would also remain part of the local community of musicians, and would be able to exercise continuing good influence on the territorial Local and to invoke, when needed, the strength of its far greater membership numbers.

### **13. Is some form of trade division possible in the near future of the AFM?**

The AFM and its Symphony Conferences are currently studying the question of trade division. At the very least, it is certain that solutions will be found and implemented to give orchestras and recording musicians a much greater direct voice in shaping the future of the AFM. Beyond that, the AFM is rejecting no ideas out of hand, and all will give careful and thorough consideration to all.

### **14. Is OSP set in concrete, or may it be expanded and "improved?"**

The IEB created OSP as a necessary and immediate response to the will and dictates of the Convention. It is obvious that experience with the program in practice will point the way to refinements. To assist this development, the program includes formation of a steering committee (with orchestra players in the majority over Federation representatives 5-3) to monitor and guide the program.

### **15. Apart from OSP, is the AFM acting to put its house in order?**

ABSOLUTELY! The programs instituted by the AFM in recent years are revolutionary. No one is more aware of the long-standing shortcomings of the Federation than its current officers. The big difference is that they are not bemoaning the problems, they are solving them and at a furious pace that has already made the AFM a very different organization than it was only a short time ago.

**16. Can any concrete evidence of this be cited?**

Easily! Just a few examples: 1) New recording policies and agreements that address the real problems of today's world; 2) A radical immediate response and provision for cash assistance to traveling musicians who are "stiffed"; 3) An on-site assistance program to work with Locals to address their service needs and aid in recruitment; 4) An all-out "push" to pass legislation that will allow club musicians the right to collective bargaining (a right enjoyed by every other American worker even those in so-called "Right-to-Work" States but denied to these musicians).

**17. Do these programs have any meaning for symphony players?**

Certainly! The great imbalance in the AFM today is the disproportionate share of the cost of the union borne by symphony and recording musicians. The only real solution to this is through aggressive organization of the other segments of the music profession (the precise thrust of these new programs) so that the cost can be correctly spread over a broader and stronger financial base giving relief to the symphony and recording players and greater strength and service to all.

**18. Wouldn't an orchestra be better off just separating from the AFM?**

Separatism has never been the correct answer in the union movement. The CIO tried to go it alone but discovered it was better to be back with the AFL. The Teamsters' recent reunion with the AFL-CIO is another example of failed separatism. Within the AFM itself, the attempt of recording musicians in LA to form a separate Guild finally yielded to the realization that only membership within the AFM could bring about the goals these musicians sought.

In separating from the AFM, an orchestra cuts itself off from the rest of its local musical community, from the AFL-CIO (a vital ally in times of trouble), from the other player conferences, and, in general, from professional musicians and organized labor everywhere. This is not unionism, nor is it the key to the future or to success.

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ACO	Association of Canadian Orchestras
ACTRA	Assoc. of Canadian Television and Radio Actors
AE	Actors Equity
AFL-CIO	American Federation of Labor – Congress of Industrial Organizations
AFM	American Federation of Musicians
AFM-EPF	American Federation of Musicians and Employers’ Pension Fund (U.S.)
AFM-EPW	American Federation of Musicians’ and Employers’ Pension & Welfare (Canada)
AFTRA	Am. Federation of Television and Radio Artists
AGMA	American Guild of Musical Artists
ASOL	American Symphony Orchestra League – Now -League of American Orchestras
AV	Symphony, Opera, Ballet Audio-Visual Agreement
BU	Bargaining unit
CANADA COUNCIL	Canadian Council of the Arts
CBA	Collective Bargaining Agreement
CBC	Canadian Broadcasting Company
CC	Canadian Conference
CCA	Canadian Conference of the Arts
CLC	Central Labor Council
CWA	Communication Workers of America
DFR	Duty of Fair Representation
DGA	Directors Guild of America
DIDO	Dollar In, Dollar Out
EMSD	Electronic Media Services Division
ERF	Emergency Relief Fund (ROPA)
IATSE	Int’l Alliance of Theater and Stage Employees
IBB	Interest-Based Bargaining



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ICSOM	International Conference of Symphony and Opera Musicians
IEB	International Executive Board
IM	International Musician
IRC	Industrial Relations Council (some Canadian provinces)
LCC	Local Conferences Council
LEADING TONE	ROPA Newsletter
MOLA	Major Orchestra Librarians Association
MPTF	Music Performance Trust Funds
NEA	National Endowment for the Arts (U.S.)
NLRA	National Labor Relations Act
NLRB	National Labor Relations Board
NPR	National Public Radio
NPTV	National Public Television Agreement
O&E	Organizing and Education Department
OCSM/OCSOM	Organization of Canadian Symphony Musicians
OFFICERS' EDGE	AFM LOCAL OFFICERS Newsletter
OSP	Orchestra Services Program
PCC	Players Conferences Council
PIT BULLETIN	TMA Newsletter
PRLA	Phonograph Record Labor Agreement
PSA	Personal Service Agreement
RMA	Recording Musicians Association
ROPA	Regional Orchestra Players Association
SAG	Screen Actors Guild
SENZA SORDINO	ICSOM Newsletter
SOI	Symphony Orchestra Institute
SPF	Special Payments Fund
SSD	Symphonic Services Division

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TA	Tentative Agreement
T&T	Traveling and Touring
TEMPO	Political Action Fund
TMA	Theater Musicians Association
ULP	Unfair Labor Practice
UNA VOCE	OCSM/OCSOM Newsletter
WGA	Writers' Guild of America