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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 ROPA Conductor 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 31) and Musician Memo (p 32)
- 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 33), Conductor Evaluation Report (p 34), and Summary Form (p 35)
- 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 ROPA **Conductor Bank Administrator**
- After notification from the ROPA Conductor 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 Bank Administrator. A model of this written request is provided on page 29 of this handbook.
2. The ROPA Conductor 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 ROPA Conductor Bank Administrator by the ROPA Delegate.

A model memo from the Conductor 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 ROPA Conductor 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 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 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 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 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 O (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, O, 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 ROPA Conductor 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 ROPA Conductor 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 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 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 or the Union or ROPA (or ICSOM) 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 the material will be returned 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 ROPA Conductor 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
Brass/Perc.	1.	3	1	0	8	3
Woodwinds	2.	1	0	4	4	3
Violins	3.	10	4	2	15	8
Vla/Vc/Cb	4.	8	6	1	10	5
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 ROPA CONDUCTOR BANK ADMINISTRATOR.

## Conductor Evaluation Form

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

<div style="border: 1px solid black; padding: 5px;"> <div style="display: flex; align-items: center;"> <div style="font-size: 2em; font-weight: bold; margin-right: 10px;">ROPA</div> <div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;">                 Regional Orchestra Players' Association             </div> </div> <p style="font-size: 0.8em; margin-top: 5px;">A conference of the American Federation of Musicians, AFL-CIO</p> </div>	N/A	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree		
1. This conductor...								
a... has a thorough <u>knowledge of the scores</u> 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?								
EXCELLEN T 0	VERY GOOD 0	GOOD 0	ABOVE AVERAG E 0	AVERAG E 0	BELOW AVERAG E 0	POOR 0	VERY POOR 0	UNACCE PTABLE 0
3. Please indicate your instrument group:								
BRASS, PERCUSSION, HARP, KEYBOARD 0	WOODWINDS 0	VIOLINS I & II 0	VIOLA, CELLO, BASS 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. Brass, Percussion, Keyboard, Harp    2. Woodwinds    3. Violins I & II    4. Viola/Cello/Bass

**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 \_\_\_\_\_

\_\_\_\_\_

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						
<b>TOTALS</b>						
<b>b. is able to communicate the emotional content of the music</b>						
Violins						
Lower strings						
Woodwinds						
Brass, percussion, keyboard, harp						
<b>TOTALS</b>						
<b>c. demonstrates excellent baton technique</b>						
Violins						
Lower strings						
Woodwinds						
Brass, percussion, keyboard, harp						
<b>TOTALS</b>						
<b>d. chooses excellent tempi</b>						
Violins						
Lower strings						
Woodwinds						
Brass, percussion, keyboard, harp						
<b>TOTALS</b>						

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

	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>						

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

**Model Memo from ROPA Conductor 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:

    Clause Conductor (ABC Symphony, 11/2008)

    Mary Maestro (DEF Opera, 11/2008 and 02/2007)

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 January 17, 2009.**

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

ROPA Conductor Bank Administrator