

## Institutional Plan for Advancing Equity, Diversity, & Inclusion

The role of Opera Theatre is to share stories of the human experience across time and cultures, by presenting exceptional, powerful, and diverse voices on the opera stage. Whether through dramatic, comedic, or real-life stories, opera's unique combination of music, words, and visual art allows audiences to engage with vivid interpretations of the range of the human condition. Like other art forms, opera exists to connect our community and to enrich our experience as human beings and as citizens of St. Louis. **To do this in a way that makes opera accessible and relevant to our entire community, there must be the inclusion of diverse voices in all aspects of the creation, planning, promotion, and management of the organization.**

### Our Commitment

**Opera Theatre is committed to the values of equity, diversity, and inclusion (EDI).**

Advancing these values is not only essential but is also uniquely grounded in our company's mission of shaping the future of opera and nurturing opera's next generation. We cannot fully live up to this mission if we do not create pathways that offer access to more people. Therefore, we commit to acknowledging and responding to individual needs (equity), embracing the differences that exist (diversity), and creating a space where everyone feels valued, safe, and included (inclusion).

While EDI has been part of OTSL's core values, we acknowledge there is much more we must do to foster a company that embodies these principles at every level, and across all areas of the company.

Pursuing racial equity is critical to the future of our field. Without sustained and sustainable equitable practices, we will have fewer people engaging – on stage, backstage, in the administration, and in audiences – with the musical culture we share and love. We will lose valuable contributions from more generations of people of color and others who have been historically excluded from opera, and this will diminish the vibrancy of the art form.

We acknowledge that opera, as a historically white and European art form, has a history and traditions that create particular problems and challenges to fostering EDI. By acknowledging the racial discrimination and structural inequities in our history, and actively working to dismantle it, we believe Opera Theatre will be able to have even more impact as a convener within our communities, to share more broadly that opera as an art form is profoundly valuable, and to provide access for more people to see a home for themselves within our art form and our institution.

Fostering a culture that enhances EDI ensures that the work of OTSL reflects the breadth of experiences, cultures, and perspectives found in our community, that the company becomes relevant and welcoming to everyone, and that OTSL remains a vibrant component of the St. Louis arts ecosystem.

## Strategic Priority

This institutional EDI plan is crafted to align with the organization's strategic plan, to ensure that EDI is a foundational value, and that all of Opera Theatre's work is grounded in the values of equity, diversity, and inclusion. Together, the two plans will operate holistically as the foundation for Opera Theatre's work.

*A summary of the 2022-2026 Strategic Plan can be found as an addendum, on page 17.*

## Audit & Assessment

Across late 2020 and 2021, Opera Theatre formed an Equity, Diversity, and Inclusion (EDI) Assessment Working Group led by then Chairman of the Board, Noémi Neidorff, and General Director, Andrew Jorgensen, and consisting of representatives from the Board Executive Committee and staff leadership.

Charged with assessing Opera Theatre's current EDI practices, this Working Group conducted an audit and assessment of the organization's practices and policies. Through in-depth interviews and surveys of more than 140 individuals across all aspects of the organization, and thorough review of policies, procedures, results, and other qualitative information, eight wide-ranging areas of focus and recommendations were identified.

### **AREAS OF FOCUS**

- Commitment & Communication at Every Level
- Personnel: Staffing & Hiring
- Leadership & Governance
- Artistic Creation & Artists' Environment
- Training the Next Generation
- Culture, Policies, & Practices
- Audience, Donors, & Community
- Education Programming

*The detailed summary of the EDI Assessment Working Group's findings can be found on page 18.*

Following that assessment, the OTSL Board of Directors formed an Equity, Diversity, and Inclusion Committee, comprised of board, staff, artist, and community representatives. This committee is charged with creating, and holding the organization accountable to, an institutional plan to advance equity, diversity, and inclusion at every level of the organization.

## Equity, Diversity, and Inclusion Committee

As a standing committee of the Board of Directors, led by Committee Chair Adrienne Davis, the EDI Committee is charged with working closely with the General Director and the staff to oversee the implementation of the EDI plan. Additionally, and just as crucially, the EDI Committee will provide structures for accountability in order to advance OTSL's mission and embody its values as a diverse,

equitable, and inclusive organization. The committee will regularly review, assess, and revise the organization's EDI plans, and work with staff to identify annual goals and determine metrics to share progress towards those goals.

As such, across late 2021 and into 2022 the committee worked with Racial Equity Consultant Dr. Derrell Acon to create a plan for advancing EDI at Opera Theatre. In sessions with Dr. Acon, the EDI committee and the OTSL staff identified more than 90 potential strategies and tactics to advance EDI, across those eight identified areas of focus. This list is not exhaustive and is expected to continue to grow and evolve. Already, it includes a wide array of items ranging from high-level strategies to single tactics; implementation timelines that span from one-time actions to requiring multi-year planning; and financial investments requiring no or low incremental expense, to those requiring significant investment of resources.

As the list continued to be refined, the EDI Committee and OTSL Leadership worked to identify a clear and sustainable process for prioritizing which strategies to address first and for identifying specific goals in each area of focus. The purpose of this process is to facilitate collaboration between the board and staff in implementing tactics to achieve those goals and in identifying ways for the organization to remain accountable to those goals.

## Implementation & Accountability

The work of advancing EDI does not end with a single list of strategies or the creation of an EDI Committee. This important work will be ongoing. It will require consistent focus, and an investment of time, attention, and resources. **The EDI Committee and staff must work together to identify priorities, to implement strategies and tactics, to report and evaluate impact, and to maintain accountability for ensuring that OTSL becomes an ever more equitable and inclusive organization.**

Acknowledging that not all 90+ items included on the original list could be successfully implemented at once, the committee and leadership considered urgency and potential impact, using survey data from the committee to ensure a data-informed approach.

Utilizing this information, as well as ongoing discussions with the staff, board leadership, and EDI Committee, we are proposing a multi-phased approach.

### Phase 1: Already Started/In Progress & Building Momentum

#### *FY22 Festival Season*

- In the next 3-4 months, across the FY2022 Festival Season, staff will continue to implement those strategies and tactics that have already begun to be put in place.
- In addition, in late April the staff across every department will identify how to implement several tactics that can be applied during the FY22 Festival Season, to continue building momentum.

## Phase 2: Harm Reduction

### *Urgent & Ongoing*

- We acknowledge that there are some structural practices still in place that actively perpetuate harm against members of our company and community. **Identifying and implementing the strategies and tactics that address these issues and reduce harm is of utmost importance.**
- **Work to change these structures and practices must begin immediately.**
- However, we know that this work will require continual focus and implementation. The work of harm reduction must be ongoing as we listen, learn, and respond. Evaluating, adapting, and adding new ways to address potential harm will continue to be a major focus across all phases.

## Phase 3: Top Priorities: Representation

### *FY2022-FY2023*

- Looking past the festival season, specific areas of focus must be identified as organizational priorities.
- FY23 Priority: As we plan for FY23, the organization must prioritize representation, ensuring that OTSL reflects our full community at all levels of the organization. In particular, we are committed to advancing racial and gender representation in our organization to more closely align with the demographics of the greater St. Louis area.
- By communicating this focus on representation and by identifying clear plans to make changes that address this issue, all levels of the organization – staff departments, board committees, volunteer groups, seasonal company members, etc. – can work to advance this priority.
- This focus on representation cannot, and will not, be done without also considering the values of equity and inclusion. As we work to increase our representation across race, gender, and other areas, we must make sure that we are creating a culture where those individuals are valued, safe, heard, and encouraged to be active participants in decision making.
- Several strategies and tactics have been identified in the following pages that specifically address representation. Immediately following the 2022 Festival Season, each department will consider their own practices, procedures, culture, etc. through a lens of these strategies.
- Across the months of July and August, the entire staff will work to suggest:
  - How these strategies could be implemented.
  - What resources would be needed to implement these strategies and tactics.
  - Specific goals and metrics for measuring impact and progress.
  - *Each department will set departmental goals; individual staff members will be asked to include EDI goals as part of their annual evaluation and goal setting process.*
- In addition, board committees and volunteer groups will also be asked to do similar work to identify areas for which they have responsibility and impact, and to lay out specific tactics and metrics for measuring impact.

## Looking Forward: Accountability and Sustainability

### *FY2023 and Beyond*

- Holding ourselves and the entire organization accountable is vital to moving this work past discussion and good intention, and into implementation and change. The role of the EDI Committee is to ensure accountability; to provide structure so that this work does not “sit on a shelf” or become something that is only discussed once a year – rather that the values of equity, diversity, and inclusion are foundational for everything that Opera Theatre does.
- To provide a sustainable mechanism for accountability, the EDI Committee will meet at least four times per year.
  - In September (beginning in September 2022), the committee will review the stated goals and priorities from each department and the board committees, as well as proposed metrics and other methods for tracking implementation, progress, and impact.
  - Across the next three committee meetings, each department as well board committees will share an in-depth update on their work with the EDI Committee. This will include reporting on the identified metrics, as well as sharing successes, areas where impact was not as strong as hoped, and other learnings.
- Going forward, the EDI Committee, in partnership with OTSL Leadership, will identify additional priorities and areas of focus on an annual basis.
  - Following the identification of those priorities, the annual process of setting goals, plans for implementation, metrics, and reporting will repeat.
- Although leaving the flexibility to adapt as we learn from this process is important, this structured approach is intended to be repeated each year, providing the same intentionality and focus as any planning process at the organization, including budgeting, season planning, etc.

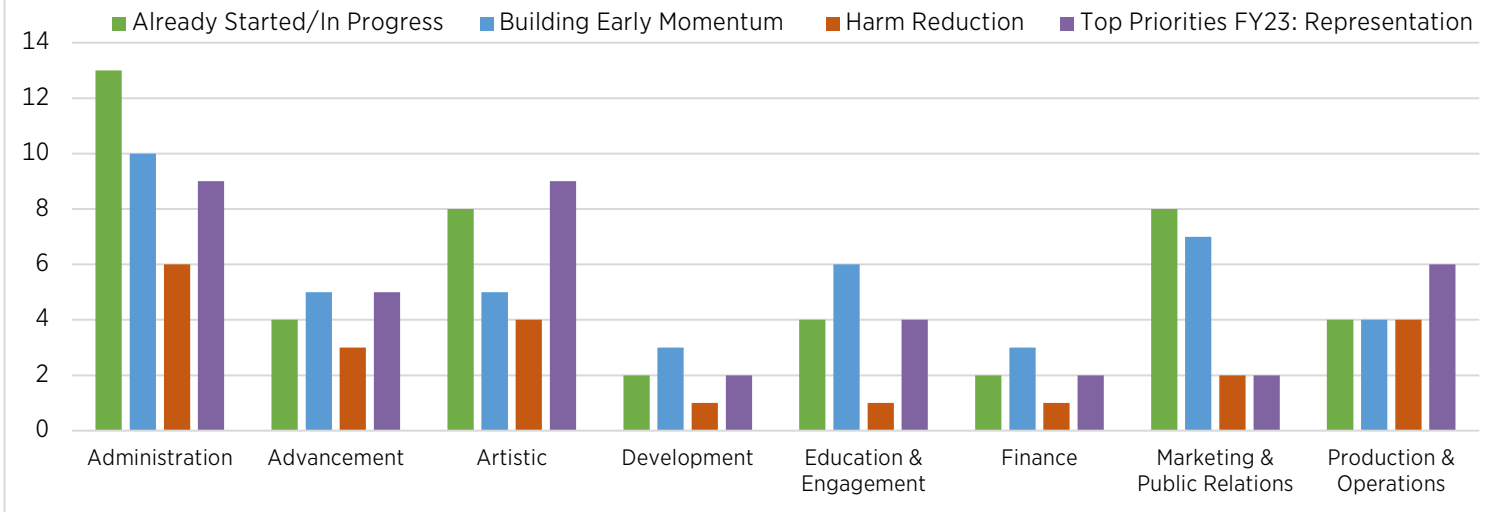
## Strategic Areas of Focus

A matrix sharing all 90+ strategies and tactics that have so far been identified, spread across each of the eight identified areas of focus listed above, can be found as an addendum, beginning on page 29.

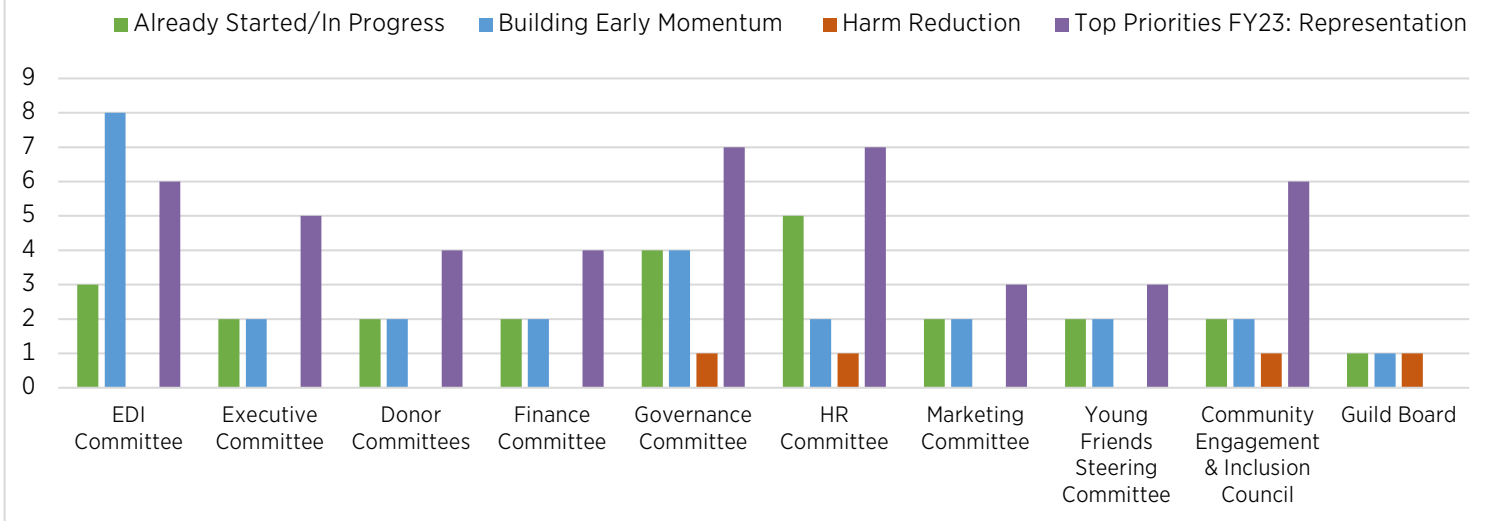
However, the EDI Committee and leadership has worked to prioritize these items, and to identify a more focused number to approach and implement first. When doing this work, it was important to look at these prioritized items holistically. How is responsibility shared across departments and committees? How are they spread across the phases, allowing for resources of time, bandwidth, and budget to be reasonably allocated?

The charts on the following page demonstrate some of those considerations.

## Staff Department Responsibilities



## Board Committees/Task Forces Responsibilities



The following pages share more detail about each of the eight original areas of focus, including:

- the original recommendations from the Audit and Assessment process,
- specific strategies and tactics that have been prioritized in each phase for FY22-FY23, and
- information about responsibility and accountability.

## Commitment & Communication at Every Level

- *Recommendations:*
  - Create a shared “language” for the organization.
  - Consistent and transparent communication about EDI work, internally and externally.
  - Robust reporting and accountability structures.
  - Broader communication across the institution that highlights our commitment to EDI and our progress toward those goals.

### **Prioritized Strategies and Tactics:**

#### **Already Started/In Progress**

- Report information & data about diversity of the organization with the board
- Add EDI intentions and initiatives to the program book

#### **Building Momentum: Begin During FY22 Festival Season**

- Ensure alignment and shared language for all staff, company members, board, & volunteers
- Define what we mean by diversity - BIPOC, gender, LGBTQ+, disability
- Ensure we are identifying and communicating the “Why” for our EDI work
- Create and share a public Values Statement
- Create a Dedicated EDI Page on website
- Share reports regularly with EDI Committee, staff, and board on EDI initiatives, progress, impact, and learnings

### **Responsibility & Accountability**

These strategies and tactics will require the commitment and participation of the entire board and every department across the company, but especially from the:

*General Director; Administration, Advancement, and Marketing & PR departments; and at the board level, the EDI Committee, Governance Committee, and HR Committee.*

In the months ahead, these staff members, departments, and committees will identify the following, and share these plans with the EDI Committee:

- How they would implement these strategies and/or tactics.
- What resources would be needed to implement these strategies and tactics.
- Specific goals and metrics for measuring impact and progress.

Once these goals and metrics are identified, they will be reported on at least annually to the EDI Committee, along with any learnings, areas where changes or adaptations are necessary to see impact, and ongoing areas of focus.

## Personnel: Recruitment, Hiring, & Staffing

- *Recommendations:*
  - *Best-in-class comprehensive personnel policies and proactive strategies for recruiting outside of existing networks for all positions.*
  - *Develop clear goals for increased diversity, equity, and inclusion within the company, and mechanisms to monitor and report on progress in this area.*

### **Prioritized Strategies and Tactics:**

#### **Already Started/In Progress**

- Conduct regular review and updating of employee policies
- Collect self-reported demographic information from all company members
- Review all job requirements and qualifications through a lens of equity, investigating biases in those stated requirements
- Integrate an expansion of conventional networks into all recruitment efforts
- Implement employee time off policies that promote diversity, such as flexible holidays, and recognize more cultural traditions.

#### **Building Early Momentum: Begin During FY22 Festival Season**

- Add pronouns to all company email signatures
- Incorporate sharing pronouns into all company introductions (annual and seasonal staff)
- Make available pins that identify pronouns for all company members, board, and volunteers

#### **FY22-23 Priorities: Representation**

- Commit to ambitious recruitment metrics for all positions, tracking via self-reported demographic information from applicants (invest in applicant tracking software to reduce bias)
- Articulate and implement clear, specific guidelines for all hiring processes, including posting guidelines for non-performing jobs
- Analyze compensation, through comprehensive benchmarking, of all positions (staff and creative) for pay equity, acknowledging the true #/% of BIPOC representation in our data
- Develop partnerships with HBCUs, Universities, BIPOC-led arts organizations to bolster recruitment efforts

### **Responsibility & Accountability**

These strategies and tactics will require the commitment and participation of the entire board and every department across the company, but especially from the:

*General Director; Administration, Advancement, Artistic, and Production departments; and at the board level, the EDI Committee, and HR Committee.*

In the months ahead, these staff members, departments, and committees will identify the following, and share these plans with the EDI Committee:

- How they would implement these strategies and/or tactics.
- What resources would be needed to implement these strategies and tactics.
- Specific goals and metrics for measuring impact and progress.

Once these goals and metrics are identified, they will be reported on at least annually to the EDI Committee, along with any learnings, areas where changes or adaptations are necessary to see impact, and ongoing areas of focus.



## Company Leadership & Board Governance

- *Recommendations:*
  - *Ensure buy-in from all company leadership – staff and board.*
  - *Continue and expand the EDI work of the Board's Governance Committee, including setting clear metrics around board composition.*
  - *Review and adapt board recruitment strategies, including expectations for board members, to reinforce the organizational commitment to EDI.*

### **Prioritized Strategies and Tactics:**

#### **Already Started/In Progress**

- Report information & data about diversity of the organization with the board
- Add EDI intentions and initiatives to the program book

#### **Building Early Momentum: Begin During FY22 Festival Season**

- Include EDI Statement in Board Expectations and by-laws
- Ensure regular reports from the EDI Committee to the Executive Committee and full Board of Directors, sharing honest and transparent progress, impact, metrics, and learnings. These reports can also share information about field-wide EDI efforts and new initiatives.

#### **FY22-23 Priorities: Representation**

- Require company leadership to participate in in-depth EDI Training, to continue to acknowledge and address biases of decision makers
- Prioritize building a board that reflects the St. Louis community
- Set specific goals for the make-up and representation on the Board and Executive Committees
- Review & adapt board recruitment and expectations to reinforce EDI commitment
- Include representatives of community engagement partners on the board

### **Responsibility & Accountability**

These strategies and tactics will require the commitment and participation of the entire board and every department across the company, but especially from the:

*General Director; Administration department; and at the board level, the EDI Committee, Executive Committee, and Governance Committee.*

In the months ahead, these staff members, departments, and committees will identify the following, and share these plans with the EDI Committee:

- How they would implement these strategies and/or tactics.
- What resources would be needed to implement these strategies and tactics.
- Specific goals and metrics for measuring impact and progress.

Once these goals and metrics are identified, they will be reported on at least annually to the EDI Committee, along with any learnings, areas where changes or adaptations are necessary to see impact, and ongoing areas of focus.

## Artistic Creation & Artists' Environment

- *Recommendations:*
  - *Commitment to telling diverse stories, with significant input from those whose stories are being portrayed.*
  - *Broaden the diversity within Creative Leadership.*
  - *Adopt practices that ensure a company which is not only diverse in its programming, but also authentically inclusive.*

### **Prioritized Strategies and Tactics:**

#### **Already Started/In Progress**

- Continue a commitment to telling diverse stories - both in the Festival Season and programming throughout the year

#### **Building Early Momentum: Begin During FY22 Festival Season**

- Report data for casting in total for the season, but also by productions

#### **Harm Reduction: Urgent & Must Be Ongoing**

- Commit to fostering an environment where artists on specifically BIPOC shows do not feel "othered"
- Explore and eliminate potential micro-aggressions in dressing rooms, fittings, coachings, and other day-to-day spaces
- Hire appropriate hair/make-up artisans and include specific cultural training

#### **FY22-23 Priorities: Representation**

- Hire more diverse creative teams, including in leadership roles. Consider and report the diversity of creative leadership across the whole season, as well as represented in each individual production.
- Prioritize diverse casts not only in BIPOC specific stories

### **Responsibility & Accountability**

These strategies and tactics will require the commitment and participation of the entire board and every department across the company, but especially from the:

*General Director; Administration, Advancement, Artistic, and Production departments; and at the board level, the EDI Committee.*

In the months ahead, these staff members, departments, and committees will identify the following, and share these plans with the EDI Committee:

- How they would implement these strategies and/or tactics.
- What resources would be needed to implement these strategies and tactics.
- Specific goals and metrics for measuring impact and progress.

Once these goals and metrics are identified, they will be reported on at least annually to the EDI Committee, along with any learnings, areas where changes or adaptations are necessary to see impact, and ongoing areas of focus.

## Culture, Policies, & Practices

- *Recommendations:*
  - *Ensure best practices in company policies and procedures, reviewed through the lens of equity and inclusion.*
  - *Training at every level in order to help communicate the organization's priorities.*
  - *Clearly communicate, explain, and enforce the company's policies and procedures.*

### **Prioritized Strategies and Tactics:**

#### **Already Started/In Progress**

- Design and implement a clear, robust code of conduct in addition to anti-harassment policies; explore a concrete policy ("three-strike" policy, time-bound improvement plan, or similar) to allow for clear expectations, learnings and growth, but also individual response
- Require anti-discrimination training for all staff and company members
- Communicate clear instructions and training on reporting/responding procedures for grievances
- Empower, and offer a system for, confidential reporting of concerns and incidents
- Communicate policies and procedures with board and volunteers

#### **Building Early Momentum: Begin During FY22 Festival Season**

- Empower staff to address issues, even if they have not risen to the level of reporting

#### **Harm Reduction: Urgent & Must Be Ongoing**

- Thoroughly explore not only who is experiencing harassment and discrimination, but also who is perpetrating, and in what spaces it is occurring.
- Adopt a clear code of conduct for board members
- Ensure that the volunteer expectations and policies include a code of conduct

#### **FY22-23 Priorities: Representation**

- Commit to building vendor/contractor/financial/asset management relationships that support equity

### **Responsibility & Accountability**

These strategies and tactics will require the commitment and participation of the entire board and every department across the company, but especially from the:

*General Director; Administration, Advancement, Artistic, Development, Education, Finance, Marketing & PR, and Production departments; at the board level, the EDI Committee, Executive Committee, Governance Committee, and HR Committee; and the Guild Board.*

In the months ahead, these staff members, departments, and committees will identify the following, and share these plans with the EDI Committee:

- How they would implement these strategies and/or tactics.
- What resources would be needed to implement these strategies and tactics.
- Specific goals and metrics for measuring impact and progress.

Once these goals and metrics are identified, they will be reported on at least annually to the EDI Committee, along with any learnings, areas where changes or adaptations are necessary to see impact, and ongoing areas of focus.

## Training the Next Generation

- *Recommendations:*
  - Review, adapt, and expand the reach of the artist application and audition process to remove barriers for participants.
  - Expand training opportunities for young singers, artisans, and administrators.

### **Prioritized Strategies and Tactics:**

#### **Already Started/In Progress**

- Reconfigure recruitment efforts to connect with more diverse GYA candidates
- Explore audition requirements that allow broader access
- Explore audition locations through a lens of access and equity
- Provide housing for production crews
- Continue our investment in Clayco Future Leaders Fellowship

#### **Building Early Momentum: Begin During FY22 Festival Season**

- Create robust alumni networks of the GYA, Browning, Emerson, and Clayco programs - continuing those relationships and support of alumni in their next steps.

#### **FY22-23 Priorities: Representation**

- Commit to training & diversifying next generation of production and front of house personnel at same level as we do for singers
- Ensure diverse representation on the music staff, who are working directly with the young artists
- Ensure more equitable access for the audition process - supporting personal expenses, sound/video quality, etc.
- Provide housing for administrative interns

### **Responsibility & Accountability**

These strategies and tactics will require the commitment and participation of the entire board and every department across the company, but especially from the:

*General Director; Administration, Artistic, and Production departments; at the board level, the EDI Committee.*

In the months ahead, these staff members, departments, and committees will identify the following, and share these plans with the EDI Committee:

- How they would implement these strategies and/or tactics.
- What resources would be needed to implement these strategies and tactics.
- Specific goals and metrics for measuring impact and progress.

Once these goals and metrics are identified, they will be reported on at least annually to the EDI Committee, along with any learnings, areas where changes or adaptations are necessary to see impact, and ongoing areas of focus.

## Audiences, Donors, & Community

- *Recommendations:*
  - *Adopt practices that prioritize all members of our audiences feeling comfortable, included, and fully welcomed at OTSL events, performances, and programs.*
  - *Develop longer-term, authentic partnerships beyond topical connections and promoting single productions.*
  - *Ensure all community and education initiatives prioritize authentic representation of, and mutual benefit to, the communities with whom we are partnering.*

### **Prioritized Strategies and Tactics:**

#### **Already Started/In Progress**

- Send email to all ticket buyers with what to expect from their experience at OTSL (highlighting that all are welcomed at picnics, post-performance tent, etc.)

#### **Building Early Momentum: Begin During FY22 Festival Season**

- Cultivate and empower Board and volunteers to be ambassadors for inviting and welcoming all to the OTSL experience
- Develop clear and open language around how we talk about our work with the community (Community Partnerships or Learnings rather than Engagement or Outreach)

#### **Harm Reduction: Urgent & Must Be Ongoing**

- Ensure accessibility for individuals with disabilities at all performances
- Develop and communicate explicit policies and practices for external constituents (audiences/patrons/donors)
- Engage with specific communities not only around tragic stories

#### **FY22-23 Priorities: Representation**

- Develop authentic relationships with community partners - not only transactional/topical
- Build partnerships not solely built around specific productions

### **Responsibility & Accountability**

These strategies and tactics will require the commitment and participation of the entire board and every department across the company, but especially from the:

*General Director; Advancement, Development, Front of House, and Marketing & PR, departments; at the board level, the EDI Committee, Development Committees, and the Marketing Committee; and the Guild Board and Community Engagement & Inclusion Council.*

In the months ahead, these staff members, departments, and committees will identify the following, and share these plans with the EDI Committee:

- How they would implement these strategies and/or tactics.
- What resources would be needed to implement these strategies and tactics.
- Specific goals and metrics for measuring impact and progress.

Once these goals and metrics are identified, they will be reported on at least annually to the EDI Committee, along with any learnings, areas where changes or adaptations are necessary to see impact, and ongoing areas of focus.

## Education Programming

- *Recommendations:*
  - *Create programs and resources with intentionality, considering how can we serve students and teachers with initiatives that are relevant and needed, and eliminate barriers that prevent teachers and students from participating in our programs.*
  - *Communicate with our community about the impact of OTSL's Education programs.*
  - *Create content in these programs that reflects the communities with which we are sharing these resources.*

### **Prioritized Strategies and Tactics:**

#### **Already Started/In Progress**

- Develop and expand specific programming that works to de-mystify opera and the opera experience

#### **Building Early Momentum: Begin During FY22 Festival Season**

- Identify and communicate specific audiences for every education program and initiative, and detailed plans for how to reach those communities
- Create an Education Task Force of diverse education experts to inform programming based on the needs of the students and educators

#### **FY22-23 Priorities: Representation**

- Create content that reflects the communities with which we are sharing these programs and resources

### **Responsibility & Accountability**

These strategies and tactics will require the commitment and participation of the entire board and every department across the company, but especially from the:

*General Director; Advancement, and Education departments; at the board level, the EDI Committee, and a new Education Task Force.*

In the months ahead, these staff members, departments, and committees will identify the following, and share these plans with the EDI Committee:

- How they would implement these strategies and/or tactics.
- What resources would be needed to implement these strategies and tactics.
- Specific goals and metrics for measuring impact and progress.

Once these goals and metrics are identified, they will be reported on at least annually to the EDI Committee, along with any learnings, areas where changes or adaptations are necessary to see impact, and ongoing areas of focus.

## **ADDENDUMS**

## Equity, Diversity, and Inclusion Committee

Adrienne Davis, Committee Chair

Derrell Acon, Racial Equity Consultant

### Committee Members:

Tania Beasley-Jolly  
Kim Eberlein  
Vincent Flewellen  
Hans Fredrickson  
Marcela Hawn  
Chantal Incandela

Andrew Jorgensen  
Barry Kirk  
Mont Levy  
Yvette Loynaz  
Michelle Myers  
Noémi Neidorff

Angel Riley  
Ray Stranghoener  
Donald Suggs  
Maria Taxman

## OTSL Administrative Staff

*April 2022*

Maggy Bort  
Stacey Bregenzer  
Brittainy Brown  
Lindsey Burke  
Allison Felter  
Morgan Fisher  
Nicole Freber  
Hans Fredrickson  
Lucie Garnett  
Kelly Glueck  
Madelyn Gunn  
Stacy Harris  
Melanie Harrison  
Kendra Henry

Chantal Incandela  
Mary Ip  
Cameron James  
Andrew Jorgensen  
Marie Jowett  
Kara Koverman  
Sally Kurt  
Anh Le  
Yvette Loynaz  
Kiandra Mays  
Tyler McKenzie  
Michelle Myers  
Stephanie Nigus  
Andréa Ochoa

Tai Oney  
Patricia Racette  
James Robinson  
Monica Roscoe  
Barry Rowold  
Steve Ryan  
Laura Schlereth  
Linda Schulte  
Orevia Vongsa  
Aaron Walker  
Dawn Walter  
Macy White  
Eric Woolsey



## Strategic Plan: TO THE 50<sup>TH</sup> SEASON & BEYOND

**OPERA THEATRE'S MISSION** is to *shape a vibrant future for opera* by connecting, inspiring, and entertaining our communities through the power and beauty of the art form; *to foster the next generation* by empowering a diverse group of artists, artisans, and administrators at the highest level; and *to make opera accessible and inclusive* through innovative and collaborative storytelling that reflects, engages, and strengthens the St. Louis community, and attracts national and international audiences.

### Our Goal:

**We seek to create an inclusive opera company that authentically reflects and engages with the St. Louis community, while being a national incubator for the art form – creating art and fostering artists and artisans of the highest level.**

### Our Strategic Priorities

#### ADVANCING THE NEXT GENERATION

**Incubate the next generation of excellence in opera** across all sectors of our company, anchored by our beliefs in fostering opportunity, expanding innovation, and advancing diversity.

- We will continue to *identify the next great on-stage talent through our young artist programs.*
- We commit to implementing new and expanded ways to *attract, train, and advance careers of rising opera professionals, building even more robust learning experiences for emerging talent in the production and administrative areas of the field.*
- We understand that a stronger commitment to *broadening access and increasing diversity will enhance the quality of our work.* We will invest in providing *additional equitable and inclusive hiring practices for all staff and company members.*

#### EXPANDING ACCESS & CONVENING OUR COMMUNITIES

Expand our impact and our audience through **increased access to opera** and **convening our communities** through operatic storytelling.

- We will create *works that inspire discussion in St. Louis and ignite the opera world.*
- We will *"show up" in more parts of our community more frequently throughout the year with stories that foster dialogue.*
- We will *engage passionately to educate and invite audiences of the future – diverse across lines of race, ethnicity, geography, age, ability, and background – to feel at home within the OTSL family.*

#### BUILDING FOR THE FUTURE – TO OTSL's 50<sup>th</sup> & BEYOND

Create the infrastructure of physical, human, and financial resources that will **sustain a vibrant future as we honor OTSL's 50<sup>th</sup> Season.**

- We will identify and cultivate the next generation of Opera Theatre, *building a robust, vibrant, and diverse board, staff, and family of supporters.*
- We commit to identifying the next step, and taking action, to *ensure we have facilities that elevate the artist and audience experience.*
- We will plan a *robust celebration of our 50<sup>th</sup> Season, honoring the traditions and successes of the past fifty years and setting an exciting vision for OTSL's next half-century.*
- We will identify ambitious and appropriate goals that will *sustain a responsible financial model, effectively address the company's facility needs, and support OTSL's continued artistic excellence.*

### Grounded in EDI

**All of Opera Theatre's work must be grounded in the values of equity, diversity, and inclusion.**

This is not only essential to the future of our organization, but it is uniquely aligned with OTSL's mission of shaping the future of opera and nurturing opera's next generation.

Fostering a culture that enhances EDI ensures that the work of OTSL reflects the breadth of experiences, cultures, and perspectives found in our community, that the company becomes relevant and welcoming to everyone, and that OTSL remains a vibrant component of the St. Louis and national arts ecosystem.

## OTSL EDI Assessment Working Group

### *Summary Report of Learnings and Recommended Areas of Focus for Moving Forward*

The role of Opera Theatre is to share stories of the human experience across time and cultures, by presenting exceptional, powerful, and diverse voices on the opera stage. Whether through dramatic, comedic, or real-life, relevant stories, opera's unique combination of music, words, and visual art allows audiences to engage with vivid interpretations of the range of the human condition. Like other art forms, opera exists to connect our community and to enrich our experience as human beings and as citizens of St. Louis. To do this in a way that makes opera accessible and relevant to our entire community, there must be the inclusion of diverse voices in all aspects of the creation, planning, promotion, and management of the organization.

**As such, Opera Theatre is committed to the values of equity, diversity, and inclusion (EDI). Advancing these values is essential to realizing the company's mission of bringing diverse audiences together through the power and beauty of opera, and cultivating the future of the art form while shining a unique and global spotlight on the St. Louis community.** While EDI has long been part of OTSL's core values, we also acknowledge there is much more we must do to realize a company that embodies these principles at every level.

**Fostering a culture that enhances EDI ensures that the work of OTSL reflects the breadth of experience, cultures, and perspectives found in our community, and that the company becomes relevant and welcoming to everyone and remains a vibrant component of the St. Louis arts ecosystem.** To successfully achieve this vision, the values of equity, diversity, and inclusion must be embodied throughout OTSL and embedded within every aspect of our work, on and off stage: in our policies, our administrative structure, hiring, employment, community programming, communications, board membership, volunteer activity, donor practices, artistic planning, and in our productions. We aspire to foster a truly inclusive culture and want this commitment and expectation to be clearly and candidly communicated to all stakeholders: staff, artists, artisans, board, volunteers, vendors, audiences, donors, and the community at large.

### **PROCESS**

The Board and Staff of Opera Theatre are partnering to create a clear and thorough plan to implement this commitment across the entire organization – listening and learning, engaging with our artists, community, and fellow arts organizations, and naming specific areas of focus that will advance EDI in our company and in the operatic field. We acknowledge that opera, as a historically white and European art form, has a history and traditions that create unique problems and challenges to fostering EDI, but we are proud to join with countless organizations across the United States, with colleagues across the national opera and St. Louis arts communities, and companies in every field and sector to address these problems as part of the broader national and international effort.

**It is of the utmost importance that we do this work thoughtfully, transparently, and in partnership with all stakeholders at all levels of the institution and beyond.** As the first step in developing an institutional equity plan, Opera Theatre formed an Equity, Diversity, and Inclusion (EDI) Assessment Working Group led by the Chairman of the Board and the General Director and consisting of representatives from the Board Executive Committee and staff leadership.

Charged with assessing Opera Theatre's current EDI practices, this Working Group conducted an audit using the following approaches:

- broad assessment of the current perceptions of the company's EDI practices through a survey of constituencies, including staff, board, artists and artisans, seasonal staff, volunteers, and patrons. *(Responses were received from 142 individuals across these constituencies.)*
- review and assessment of Opera Theatre's policies, procedures, and results, as they relate to and impact the company's EDI work through an analysis of data from the past 10 years,
- gathering qualitative information about Opera Theatre's current practices and culture through in-depth interviews with staff, artistic leadership, Engagement & Inclusion Task Force members, and leadership from the Black Opera Alliance, and
- learning best practices and contextualizing Opera Theatre's role and perceived reputation within the field through interviews with leaders from our community, staff and board members from other organizations, and executives from other opera companies.

## **AREAS OF FOCUS & ACCOUNTABILITY**

This report from the EDI Assessment Working Group summarizes the overarching learnings from this audit and assessment. These learnings, detailed in more depth on pages 4-10, helped us identify several wide-ranging areas of focus and recommendations for further work, including:

- **Commitment & Communication at Every Level**
  - Consistency and transparency of communication about EDI work.
  - Robust reporting and accountability structures.
  - Broader communication across the institution that highlights our commitment to EDI and our progress toward those goals.
- **Personnel: Staffing & Hiring**
  - Best-in-class comprehensive personnel policies and proactive strategies for recruiting outside of existing networks for all positions.
  - Develop clear goals for increased diversity, equity, and inclusion within the company, and mechanisms to monitor and report on progress in this area.
- **Leadership & Governance**
  - Continue and expand the EDI work of the Board's Governance Committee, including setting clear metrics around board composition.
  - Review and adapt board recruitment strategies, including expectations for board members, to reinforce the organizational commitment to EDI.
  - Adopt robust plans for ongoing reporting systems and metrics for accountability
- **Artistic Creation & Artists' Environment**
  - Commitment to telling diverse stories, with significant input from those whose stories are being portrayed.
  - Broaden the diversity within Artistic and Creative Leadership.
  - Adopt practices that ensure a company which is not only diverse in its programming, but also authentically inclusive.
- **Training the Next Generation**
  - Review, adapt, and expand the reach of the artist application and audition process to remove barriers for participants.
  - Expand training opportunities for young singers, artisans, and administrators.

- **Culture, Policies, & Practices**
  - Ensure best practices in company policies and procedures, reviewed through the lens of equity and inclusion.
  - Training at every level in order to help communicate the organization's priorities and create a shared "language" for the organization.
  - Clearly communicate, explain, and enforce the company's policies and procedures.
- **Audience, Donors, & Community**
  - Adopt practices that prioritize all members of our audiences feeling comfortable, included, and fully welcomed at OTSL events, performances, and programs.
  - Develop longer-term, authentic partnerships beyond topical connections and promoting single productions.
  - Ensure all community engagement prioritizes authentic representation of, and mutual benefit to, the communities with whom we are partnering.
- **Education Programming**
  - Create programs and resources with intentionality, considering how can we serve students and teachers with initiatives that are relevant and needed, and eliminate barriers that prevent teachers and students from participating in our programs.
  - Raise awareness in our community of the impact of OTSL's Education programs.
  - Create content in these programs that reflects the communities with which we are sharing these resources.

More detail about the learnings and recommendations for continuing work in each of these areas are detailed in the following pages. To ensure that Opera Theatre is accountable to, and continues to grow its commitment to EDI, this work will be guided in three broad ways across the coming months:

- 1) OTSL will **engage an EDI specialist consultant** to help the company **identify specific goals** to advance each area enumerated in this report, develop **tactics to achieve those goals**, and determine **mechanisms of accountability**. This work will be done in partnership with board and staff leadership.
- 2) A **Board-level standing committee will be formed**, including board members, staff, artists, and community representatives. Just as the board's Finance and Governance Committees provide institutional accountability in those areas, so too will this committee be **charged to hold the institution accountable for continuing EDI work as an integral part of the organization's ongoing strategy at every level**. This will include goal setting with specific metrics, as well as developing systems and structures for accountability.
- 3) OTSL is currently at work on a 5-year strategic plan. The learnings and recommendations of this working group will be shared with the full Board of Directors so that the **values of EDI are incorporated into all facets of the ongoing Strategic Planning process**.

We acknowledge that this work, and the commitment to EDI will be ongoing and never "finished." We believe that a continued focus on EDI work, and building a culture anchored in these principals, is a vital and ongoing part of being a leading, welcoming, and accessible opera company.

## **LEARNINGS & RECOMMENDATIONS**

### **Commitment & Communication at Every Level**

The company's longstanding commitment to diversity is apparent to our community. Responses to the survey showed that 84.2% agree or strongly agree that OTSL is committed to fostering a culture that advances EDI, and 73.2% agree/strongly agree that the company is making progress in these areas.

However, it is evident that there is more work to do. Even with the broad perception of a commitment to EDI, 18.7% of survey respondents shared that they have either personally witnessed, or been the victim of, discrimination at OTSL. Many artists have come forward this year on social media, in panel discussions, and in public statements to share their personal experiences at opera and arts organizations across the country. We acknowledge the courage it takes to speak out, and we recognize the work that must happen across the field, and in every aspect of our organizations, to create more inclusive spaces.

Throughout the data, we also learned that many stakeholders are not aware of OTSL's specific initiatives, strategies, and commitments around our EDI work. **The consistency and transparency of communication about this work, both within and outside the organization, must be addressed.** As we undertake more of this work, it will be important to thoroughly and thoughtfully communicate its importance and prioritization with everyone in the OTSL community.

**Based on these learnings, we recommend EDI training at all levels of the institution, continuing to develop reporting and accountability structures (including a board member ombudsman and anonymous reporting) to ensure that all company members feel safe at work, and broader communication across the institution that highlights our commitment to EDI and our progress toward those goals.**

### **Personnel: Staffing & Hiring**

The Working Group looked closely at the current composition of the staff, across all levels of the organization, and at the company's hiring practices. They found the following:

The survey of a wide range of constituents found that 42% of respondents perceived there to be cultural/racial diversity among the people working at the company. There was a significant difference in that perception, however, depending on the constituency that was responding:

- **Administrative staff: 10% agree or strongly agree**
- **Seasonal personnel: 39% agree or strongly agree**
- **Board members: 41% agree or strongly agree**
- **Patrons and volunteers: 55% agree or strongly agree**

The Working Group reviewed demographic data about company members from 2015-2020<sup>1</sup>. Looking at all personnel - seasonal and year-round – approximately 12% of all hires in that timeframe (205 out of 1,734 hires) were individuals who identify as BIPOC (Black, Indigenous, and People of Color).

- **5% (2 out of 36) of current administrative staff identify as BIPOC** (as of 12/15/20).
  - *In January 2021, with the launch of the new Clayco Future Leaders Fellowship and a new Director of Artistic Administration, OTSL hired four individuals who identify as BIPOC, adding these new and diverse voices and perspectives to the team.*
- **5% (10 out of 201) of those hired for Leadership or Management positions between 2015-2020 identify as BIPOC** (*this includes Company Leadership, Administrative Department Directors, Stage Directors, Designers, Conductors, and Production Department Heads*)
- **Performers are the most diverse group, with 25% identifying as BIPOC since 2015.** However, this seems to be driven by repertoire requirements, with the years featuring shows specifically telling diverse stories demonstrating a higher level of diversity in the cast (e.g., 2019, featuring *Fire Shut Up in My Bones*, had 46% of performers who identify as BIPOC, compared to 10% in 2017). This disparity was strongly noted throughout the data by performers and other staff.

A review of salary information revealed no current disparities along racial or gender lines within the levels of the organization's current staff and company members. **As we implement our institutional EDI plan, we will continue to monitor salary equity closely.**

The company's hiring practices currently rely heavily on existing networks and connections to artists, creative teams, and colleagues. **While all vacant administrative positions are advertised publicly, many seasonal positions, especially more senior positions, are not made public.** Working through existing networks yields more homogenous teams and adds fewer new voices to the company.

The hiring of seasonal staff, especially production crews, is also impacted by the parameters of the Festival Season (a short season, competing with longer contracts offered at other companies both in St. Louis and across the country). **However, the company is working to find new and innovative ways to provide incentives and remove barriers that are in place.** Prior to the cancellation, for the 2020 Festival Season, the company had already begun working to provide housing for some members of the production crews to address this barrier.

**Hiring must be a key focus of our EDI work across all areas of the company. We must ensure we have best-in-class comprehensive personnel policies, proactive strategies for recruiting outside of existing networks for all positions, clear goals about increased diversity within the company, and mechanisms to monitor and report on progress in this area.**

<sup>1</sup>*Demographic data was compiled based on the results of each hiring decision that was made in a specific year. The information represents an educated estimate, based on information that is readily and publicly available.*

## **Leadership & Governance**

We acknowledge that a commitment to diversity, equity, and inclusion must start with Opera Theatre's leadership.

The survey found that **76% of respondents thought that the company leadership and management demonstrate through their actions that EDI is important.**

At the governance and board level, OTSL's Board of Directors launched a diversity and equity initiative in 2018, focused on identifying and cultivating new prospects for board membership, and building a board which mirrors the racial demographics of our community.

- When the initiative began, 13% of board members identified as BIPOC, and 0% of the Executive Committee.
  - Some progress has been made since the initiative launched, although there is still much work to be done to achieve a board that reflects our community. **As of December 2020, 20% of the full board membership identified as BIPOC, and 6% of the Executive Committee.**
- It became clear through this assessment that **the goals and metrics for measuring diversity as part of this governance and board initiative were not clearly defined and that they must be made more explicit and shared with stakeholders on the board and at other levels.**

**The board must continue and expand the work of its diversity and inclusion task force, in conjunction with setting clear goals about board composition. Conversations are ongoing at the Governance Committee about board recruitment strategies and how to ensure our expectations for board members are reinforcing the organizational commitment to EDI.**

## **Artistic Creation & Artists' Environment**

**The New Works, Bold Voices series of commissions have been extremely successful at highlighting diverse stories on the stage.** These works are an important cornerstone of Opera Theatre's national and international artistic profile, garnering significant press and media, launching singers' careers, and premiering pieces that are subsequently produced across the field. A significant portion of survey respondents listed these productions and the related community programming as the company's most successful efforts to support diversity.

However, there was also significant feedback that the process for creating these productions did not always include a high level of input from those whose stories were being portrayed. The leadership making decisions about programming, as well as the creative teams for these productions, have not reflected the identities portrayed in the operas. This is confirmed through analysis of the personnel data: **7.5% of Creative Leadership (Stage Directors, Designers, and Conductors) since 2015 has been BIPOC (8 out of 107).**

Through the survey and interviews, artists shared both personal experiences and their perceptions that while there has been an increase in diversity in casting, these changes have often been related only to

specific shows, leaving artists in those “diverse” shows to feel disconnected from the rest of the performers and company.

**In that spirit, the concern and desire to ensure a company which is not only diverse but also authentically inclusive was a theme in many of the Working Group’s conversations.** Broadening diversity within Creative Leadership must also be a key focus going forward.

### **Training the Next Generation**

Opera Theatre plays a vital role in the training and development of young artists and artisans and the company's training programs continue to be among the best in the field. These training programs are an area where OTSL has already had significant impact on diversifying the field, and also an area where we can still do much more to foster EDI, not only at our own company, but across the field for generations to come.

The Working Group’s assessment included significant discussion about the “entry points” young artists have to gain access to OTSL and to the field.

- Opera Theatre has a history of an economically accessible young artist program – we have never required an application fee for the Gerdine Young Artist (GYA) program and have always offered a clear and competitive fee structure for the company’s GYA program, including housing for all young artists. In addition, the GYA audition tour takes place in multiple cities across the country, allowing those outside of the traditional artistic centers (i.e., New York) to audition.
- However, the singers who are heard in the auditions are still majority white.
  - **In the past year, the company has begun a process of reviewing and adapting the application and audition process to identify and remove inherent barriers.**
  - Other methods of expanding our audition reach will also need to be explored, such as building connections with more universities and college music schools and historically Black colleges and universities (HBCUs), and further reviewing the accessibility of our application process and procedures.
- **As we adapted to the pandemic in 2020, we learned that some of the components of the GYA program could be successfully conducted via digital platforms. Inspired by this learning, Opera Theatre has expanded the GYA program, beginning in 2021, to include virtual master classes for young artists with our artistic staff and clinicians across the country in the months leading up to OTSL’s festival season. This additional time for learning will allow OTSL to accept young artists into the program who have demonstrated talent but who may not have had equitable access to more advanced educational opportunities.**
- **Responses to the survey, conversations with staff, and interviews with others in the opera field highlighted potential structural barriers in the field at large (e.g., access to training opportunities and education) for BIPOC individuals, and how these inequities can be**



amplified by the processes and systems in place to judge “excellence” in the selection process for these positions and programs.

- Acknowledging that individuals who identify as BIPOC have historically been underrepresented in the administration of opera companies, **Opera Theatre has launched the Clayco Future Leaders Fellowship program to train and support the advancement of BIPOC arts administrators.** A diverse administrative staff will add crucial perspectives to planning and decision making, and by expanding the organization’s networks, will also further support the work of recruiting and hiring diverse artists and artisans.

### **Culture, Policies, & Practices**

As shared earlier, the survey found that 84.2% of respondents Agreed or Strongly Agreed that OTSL is committed to fostering a culture that advances diversity, equity, and inclusion.

In addition, **75.4% of respondents agree/strongly agree that the company’s policies, procedures, and practices discourage discrimination and encourage equity.**

However, there were several important themes of critical feedback that arose through the assessment process.

- Several responses from performers and seasonal personnel shared that **not everyone is aware or fully understands the company’s current policies and procedures.**
- Opera Theatre updated its anti-harassment policies in 2018 and has made a concerted effort to better communicate its stance against and non-tolerance of sexual harassment. **This same level of communication and clarity of message should be implemented with respect to racial discrimination, as well.**
- Opera Theatre is in the process of reviewing and revising its Code of Conduct, to ensure we have a best-in-class policy and an organizational anti-racism statement that will be communicated clearly to all stakeholders – staff, seasonal personnel, board, and volunteers.
- Many stakeholders, through both the survey responses and interview conversations, ask for **additional training to be provided at every level – annual staff, seasonal personnel, board, and volunteers – in order to help communicate the organization’s priorities and create a shared “language” for the organization.** This would also provide consistent and clear information about the company’s policies and procedures and would empower individuals to respond appropriately in difficult situations.

Beyond formal policies, the company’s culture must be one that welcomes and respects all participants. **In addition to written policies, Opera Theatre’s is looking at internal and external practices through the lens of equity and inclusion, asking questions about our systems and structures, vendors, contractors, and partners – how can we address the full scope of needs to create an inclusive environment that does not prioritize efficiency at the expense of equity and inclusion?**

### **Audience, Donors, & Community**

Opera Theatre's community – audience, donors, volunteers – are profoundly loyal and generous. In the interviews with staff leadership, there was much discussion about how we can continue to provide these constituents with meaningful experiences in a community-centric, equitable and inclusive way.

Responses to the survey and conversations with stakeholders reinforced that those who are in the “OTSL Family” – those audience members and patrons who are already closely engaged and connected – deeply value the aspects of the company that make them feel so welcome. However, we also learned that new audiences don't always feel as welcomed or see that same level of accessibility. **An important aspect of our audience building work as we move forward will be to ensure that all members of our audiences feel comfortable, included, and fully welcomed at all OTSL events, performances, and programs – by staff, other patrons, and those who are already members of the “OTSL Family”.**

In addition to this accessibility, we must also work to expand the scope of opera's appeal to new audiences by telling stories that resonate with new and diverse communities, and explore the engaging issues in which they are interested.

Building on the work that started with OTSL's production of *The Death of Klinghoffer*, community engagement has been a pillar of Opera Theatre's work since 2011. The Engagement & Inclusion Task Force was created to help the Opera Theatre team build connections with new communities and has been successfully continuing this work since 2012.

- Over the past several years, this Task Force, along with the Board and Staff, have endeavored to build on this success – especially focusing on **developing longer-term, authentic partnerships that go beyond the topical connections and transactional nature of promoting a single production, with a broader goal of OTSL authentically showing up in new communities.**
- **It is vitally important that all our community engagement work is done through an EDI lens, which prioritizes authentic representation of, and mutual benefit to, the communities with whom we are partnering.** Events, communications, and marketing specifically for diverse communities should be approached with intentionality, structure, and clarity, and with the same expectation of quality as in all of OTSL's work. All of OTSL's community programming should be created and presented in a way that is authentically informed by that community.

The support and partnership of the entire OTSL community through the years has made possible the artistic excellence, innovation, growth and success of the company. **It is important that we invite our audiences, donors, and community members to be our partners in our commitment to this work.**

### **Education Programming**

Opera Theatre's K-12 education programs, such as Opera on the GO!, and the Bayer Fund Artist-in-Training (AIT) program, provide deep and impactful connections with students in the St. Louis region.

In particular, the AIT program is unique in the field, and has a rich history of identifying and supporting students who would not otherwise be connected to the art form, many of whom come from backgrounds historically underrepresented in opera.

- However, **the awareness in our community of this work is not as widely known as it should be.** Unlike other programs, like the Muny Kids or the SLSO Youth Orchestra, many in the St. Louis community are not aware of these programs.
- In addition, as the educational landscape has changed and continues to change, it is **important for OTSL to adapt and to continue to evolve to make sure we are creating programs and resources with intentionality: who are the target audiences for our education programs, how can we serve those audiences with initiatives that are relevant and needed, and how can we eliminate barriers that prevent teachers and students from participating in our programs?**
- It is also vitally important that we **create content in these programs that reflects the communities with which we are sharing these resources.**

## **KEY TAKEAWAYS AND NEXT STEPS**

Through this assessment process, the EDI Assessment Working Group has learned a great deal and gained important perspective on OTSL's current EDI practice and how we can advance these values within the company. We are deeply grateful for the openness, transparency, and commitment of the entire Opera Theatre community and stakeholders who have participated in this process so far.

**Propelled by these learnings, the OTSL staff and board will now move forward to engage a consultant, create specific goals and tactics, incorporate this work into our strategic plan, and hold ourselves accountable through a standing board committee. Throughout the process, we will continue to be in conversation with our stakeholders as well as with partners in the broader St. Louis community, and the local and national arts communities. EDI is commanding the attention of companies across the country - we know we are joined in this work by many other arts and opera institutions. We will work with our fellow companies across the field to share best practices, learnings, and to hold ourselves and others accountable to continuing this work, now and in the future.**

Throughout this overview of our learnings, we have incorporated a few ideas from colleagues and staff members – including several that are already underway. We are encouraged by these positive steps and committed to acting on all areas of learning identified within this document which will help us move forward in our EDI work and to remain a leader within the field of opera. **We know that prioritizing and advancing EDI requires an investment of resources: time, energy, bandwidth, social capital, and financial. Opera Theatre is committed to supporting these values across the institution, and to investing in this vital work.**

## ADDENDUMS

### DEFINITIONS

For this audit and assessment process, the EDI Assessment Working Group has been using the following working definitions for diversity, equity, and inclusion. As this work continues, Opera Theatre will work to develop and adopt organizational definitions of these terms and concepts.

- **Diversity** is the representation of varied identities and differences, collectively and as individuals.
- **Equity** is the assurance of fair treatment, access, opportunities, and advancement for all, acknowledging the advantages and the barriers that exist for different individuals.
- **Inclusion** is a culture of belonging marked by the active, welcome, and valued contribution and participation of all people.

### PROCESS OVERVIEW – FY2021

<u>Fall 2020</u>	<u>Winter 2021</u>	<u>Spring 2021</u>	<u>Summer 2021</u>	<u>Fall 2021</u>
EDI Audit & Assessment Launched  Survey of all OTSL Constituents - Staff, Artists, Seasonal Staff, Board, Volunteers (140 Respondents)  Individual Interviews with all Staff Leadership  Review of historical data, policies, procedures  Conversations with Leaders from other Institutions	Compile Report of Learnings from the Audit & Assessment  Share Learnings Report with our community  Engage EDI consultant  Strategic Planning continues - EDI is one of the plan's foundations	Form and launch a Board-level EDI Committee  EDI Training for all OTSL staff, company members, and volunteers during the Festival Season	Develop goals and methods for accountability	EDI committee recommends goals for 2022

### EDI ASSESSMENT WORKING GROUP MEMBERS:

Noémi Neidorff, Chairman  
 Andrew Jorgensen, General Director  
 Ray Stranghoener, Vice-Chair &  
 Governance Committee Chair  
 Mont Levy, Treasurer

Kim Eberlein, Executive Committee Member &  
 Strategic Planning Chair  
 Adrienne Davis, Executive Committee Member &  
 Director, Center for the Study of Race,  
 Ethnicity, & Equity at Washington University  
 Michelle Myers, Director of Administration

OTSL Equity, Diversity, and Inclusion Plan  
Areas of Consideration and Tactics

Definitions:

<b>Term/"Horizon":</b> the estimated length of time needed to implement that tactic, from the time that specific tactic begins through its full implementation.	<b>Immediate = One time or within 6 months</b>	<b>Medium-term = 2-5 years</b>
	<b>Short-term = 6 months-2 years</b>	<b>Long-term = 5 years or more</b>
		<b>Ongoing = continous</b>
<b>Cost:</b> the estimated amount of <b>incremental</b> expense this tactic would require to fully implement. (Incremental above FY22 budget)	<b>None= no additional financial resources required</b>	<b>Medium = \$2,000 - \$10,000</b>
	<b>Low = &lt; \$2,000</b>	<b>High = \$10,000+</b>
<b>Note:</b> Tactics that would be one time costs are noted with a (1x), while costs that would be reoccurring annual expenses are noted with (R)		

Focus Area		Strategies/Tactics		\$ Cost (Incremental)	Term ("Horizon")		Responsibility			Status		Reporting
							Staff/ Company Members	Board				
Commitment & Communication		Ensure alignment and shared language for all staff, company members, board, & volunteers		None	Short		Management Team	EDI Cmte / Full Board				
		Define what we mean by diversity - BIPOC, LGBTQ+, gender		None	Imm.			EDI Cmte				
		Clarify the framework, responsibility, and systems of HR in the organization		None	Short		Admin	HR Cmte				
		Ensure we are identifying and communicating the "Why" for our EDI work.		None	Imm.		Admin / Advancement / Marketing / Development	EDI Cmte				
		Integrate disability initiatives into the EDI Committee framework and process		Mid (R)	Med.		All Depts	EDI Cmte				
		Report information & data about diversity of the organization with the board		None	Ongoing		Admin	EDI Cmte / Gov Cmte				
		Create and share a public Values Statement		None	Imm.		Marketing / Admin	EDI Cmte				
		Create a Dedicated EDI Page on website		None	Imm.		Marketing					
		Add EDI intentions and initiatives to the program book		None	Imm.		Marketing / Admin					
		Share reports annually with EDI Committee, staff, and board on EDI initiatives, progress, impact, and learnings		None	Short		Admin	EDI Cmte				
		Include OTSL's commitment to EDI in contracts/agreements with all partners		None	Short		Admin / All Depts					
		Communicate clearly and transparently with all constituents regarding the diversity of OTSL, based on self-reported data		None	Short		Admin / Marketing	EDI Cmte / HR Cmte / Gov Cmte				
		Issue: 100% should think OTSL is committed to fostering a culture that advances EDI (currently 84% in survey)										

<b>Definitions:</b>		
<b>Term/"Horizon":</b> the estimated length of time needed to implement that tactic, from the time that specific tactic begins through its full implementation.	<b>Immediate = One time or within 6 months</b>	<b>Medium-term = 2-5 years</b>
	<b>Short-term = 6 months-2 years</b>	<b>Long-term = 5 years or more</b>
		<b>Ongoing = continous</b>
<b>Cost:</b> the estimated amount of <b>incremental</b> expense this tactic would require to fully implement. (Incremental above FY22 budget)	<b>None= no additional financial resources required</b>	<b>Medium = \$2,000 - \$10,000</b>
	<b>Low = &lt; \$2,000</b>	<b>High = \$10,000+</b>
<i>Note: Tactics that would be one time costs are noted with a (1x), while costs that would be reoccurring annual expenses are noted with (R)</i>		

Focus Area		Strategies/Tactics		Responsibility		Status	Reporting
		\$ Cost (Incremental)	Term ("Horizon")	Staff/ Company Members	Board	Updated to reflect implementation stage	Notes on how/when impact and progress will be reported
Personnel: Recruitment, Hiring, & Staffing	Commit to ambitious recruitment metrics for all positions, tracking via self-reported demographic information from applicants (invest in applicant tracking software that reduces bias)	Low (R)	Imm / Ongoing	Admin / Artistic / Production	HR Cmte		
	Integrate an expansion of conventional networks into all recruitment efforts	Low (R)	Med	All Depts	Full Board		
	Articulate and implement clear, specific guidelines for all hiring processes, including posting guidelines for non-performing jobs	Med (R)	Imm	Admin / Artistic / Production	HR Cmte / EDI Cmte		
	Analyze compensation, through comprehensive benchmarking, of all positions (staff and creative) for pay equity. Acknowledging the true #/% of BIPOC representation in our data analysis in these studies	Med (1)	Short	Admin / Finance / All Depts	HR Cmte		
	Investigate biases in access to professional development and growth opportunities at OTSL	Low (1)	Short	Admin	EDI Cmte / HR Cmte		
	Conduct regular review and updating of employee policies	None	Ongoing	Admin	HR Cmte		
	Collect self-reported demographic information from all company members	None	Imm / Ongoing	Admin			
	Review all job requirements and qualifications through a lens of equity, investigating biases in those stated requirements	None	Short	All Depts / Admin			
	Add pronouns to all company email signatures	None	Imm	Marketing			
	Incorporate sharing pronouns into all company introductions (annual and seasonal staff)			All Depts			
	Make available pins that identify pronouns for all company members, volunteers, and board members			Admin			
	Implement employee time off policies that promote diversity, such as flexible holidays, and recognize more cultural traditions.	Low (R)	Ongoing	Admin	HR Cmte		
	Develop partnerships with HBCUs, Universities, BIPOC-led arts organizations to bolster recruitment efforts	Low (R)	Long	Admin / Education / Advancement / Production / Artistic	Full Board		

<b>Definitions:</b>		
<b>Term/"Horizon":</b> the estimated length of time needed to implement that tactic, from the time that specific tactic begins through its full implementation.	<b>Immediate = One time or within 6 months</b>	<b>Medium-term = 2-5 years</b>
	<b>Short-term = 6 months-2 years</b>	<b>Long-term = 5 years or more</b>
		<b>Ongoing = continous</b>
<b>Cost:</b> the estimated amount of <b>incremental</b> expense this tactic would require to fully implement. (Incremental above FY22 budget)	<b>None= no additional financial resources required</b>	<b>Medium = \$2,000 - \$10,000</b>
	<b>Low = &lt; \$2,000</b>	<b>High = \$10,000+</b>
Note: Tactics that would be one time costs are noted with a (1x), while costs that would be reoccurring annual expenses are noted with (R)		

Focus Area	Strategies/Tactics		Responsibility		Status	Reporting	
		\$ Cost (Incremental)	Term ("Horizon")	Staff/ Company Members	Board	Updated to reflect implementation stage	Notes on how/when impact and progress will be reported
Company Leadership & Governance	Clearly define metrics & goals to measure across domains	None	Short	All Departments	EDI Cmte		
	Include EDI Statement in Board Expectations and by-laws	None	Short		Gov Cmte		
	Require company leadership to participate in in-depth EDI Training, to continue to acknowledge and adress biases of decision makers	Low (1)	Short / Med	Admin	Full Board / EDI Cmte		
	Prioritize building a board that reflects the St. Louis community	None	Long		Full Board / Gov Cmte		
	Set specific goals for the make-up and representation on the Board and Executive Committees	None	Med		Governance / Exec Cmte		
	Implement mentorship/training program for future board prospects	Low (R )	Med		Governance / Full Board		
	Review & adapt board recruitment and expectations to reinforce EDI commitment	None	Short		Governance / HR Cmte / EDI Cmte		
	Include representatives of community engagement partners on the board	None	Med / Long		Gov Cmte / Eng & Inc Council		
	Explore artistic representation on the board, recruiting from national/international networks	None	Med		Governance		
	Collaborate with other opera/arts organizations to develop and implement best-practices for governance, metrics, and methods of accountability	Low (R )	Med	Admin	Full Board		

<b>Definitions:</b>		
<b>Term/"Horizon":</b> the estimated length of time needed to implement that tactic, from the time that specific tactic begins through its full implementation.	<b>Immediate = One time or within 6 months</b>	<b>Medium-term = 2-5 years</b>
	<b>Short-term = 6 months-2 years</b>	<b>Long-term = 5 years or more</b>
		<b>Ongoing = continous</b>
<b>Cost:</b> the estimated amount of <b>incremental</b> expense this tactic would require to fully implement. (Incremental above FY22 budget)	<b>None= no additional financial resources required</b>	<b>Medium = \$2,000 - \$10,000</b>
	<b>Low = &lt; \$2,000</b>	<b>High = \$10,000+</b>
<i>Note: Tactics that would be one time costs are noted with a (1x), while costs that would be reoccurring annual expenses are noted with (R)</i>		

Focus Area		Strategies/Tactics		Responsibility		Status		Reporting	
		\$ Cost (Incremental)	Term ("Horizon")	Staff/ Company Members		Board		Updated to reflect implementation stage	
Artistic Creation & Artists' Environment		Hire more diverse creative teams, including in leadership roles. Consider and report the diversity of creative leadership across the whole season, as well as represented in each individual production.	None	Short	Admin / Artistic / Production				
		Prioritize diverse casts not only in BIPOC specific stories	None	Med	Artistic				
		Commit to fostering an environment where artists on specifically BIPOC shows should not feel "othered"	None	Short	All Departments				
		On productions focused on a specific identity, commit to including creative leadership who identify with that identity	None	Med	Artistic / Production				
		Explore and eliminate potential micro-aggressions in dressing rooms, fittings, coachings, and other day-to-day spaces	None	Imm	Admin / Artistic / Production				
		Hire appropriate hair/make-up artisans and include specific cultural training	None	Med	Production / Artistic				
		Report data for casting in total for the season, but also by productions	None	Short	Artistic / Admin				
		Continue a commitment to telling diverse stories - both in the Festival Season and programming throughout the year	None	Ongoing	Artistic / Education / Advancement	Full Board			
		Lead the field in changing the face of opera	None	Ongoing	All Departments	Full Board			
		Collaborate with other opera/arts organizations to develop and implement best-practices for creative policies and practices	Low (R )	Med	Artistic / Admin	Full Board			



<b>Definitions:</b>		
<b>Term/"Horizon":</b> the estimated length of time needed to implement that tactic, from the time that specific tactic begins through its full implementation.	<b>Immediate = One time or within 6 months</b>	<b>Medium-term = 2-5 years</b>
	<b>Short-term = 6 months-2 years</b>	<b>Long-term = 5 years or more</b>
		<b>Ongoing = continous</b>
<b>Cost:</b> the estimated amount of <b>incremental</b> expense this tactic would require to fully implement. (Incremental above FY22 budget)	<b>None= no additional financial resources required</b>	<b>Medium = \$2,000 - \$10,000</b>
	<b>Low = &lt; \$2,000</b>	<b>High = \$10,000+</b>
Note: Tactics that would be one time costs are noted with a (1x), while costs that would be reoccurring annual expenses are noted with (R)		

Focus Area		Strategies/Tactics		Responsibility		Status		Reporting	
		\$ Cost (Incremental)	Term ("Horizon")	Staff/ Company Members		Board		Updated to reflect implementation stage	
Culture, Policies, & Practices		Empower all staff and board to be custodians of our values & culture	None	Short	All Depts	Full Board			
		Design and implement a clear, robust code of conduct in addition to anti-harassment policies. <i>Explore a concrete policy ("three-strike" policy, time-bound improvement plan, or similar) to allow for clear expectations, learnings and growth, but also individual response</i>	None	Imm	Admin	HR Cmte			
		Require anti-discrimination training for every single staff and company member	High (R)	Imm	Admin / Artistic / Production				
		Communicate clear instructions and training on reporting/responding procedures for grievances	None	Imm	Admin				
		Require pre-production training for creative teams	Low (R)	Short	Admin / Artistic / Production				
		Include expectations around company values and practices in all contracts	None	Short	Admin				
		Plan for an entire day of orientation pre-season - creating a shared understanding of policies and practices	Med	Short	Admin / Production / Artistic				
		Empower, and offer a system for, confidential reporting of concerns and incidents	None	Short	Admin				
		Empower staff to address issues, even if they have not risen to the level of reporting	None	Short	Admin / All Depts				
		Thoroughly explore not only who is experiencing harassment and discrimination, but also who is <u>perpetrating</u> , and in what spaces it is occuring.	None	Imm	Admin	HR Cmte			
		Communicate policies and procedures with board and volunteers	None	Imm	Admin	Gov Cmte / Guild			
		Adopt a clear code of conduct for board members	None	Short		Gov Cmte			
		Ensure that the volunteer expectations and policies include a code of conduct	None	Short	Admin	Guild Board			
		Commit to building Vendor/contractor /financial/asset management relationships that support equity	None	Long	Admin / Marketing / Development / Finance	Exec Cmte / Finance Cmte / Corporate Sponsor Cmte			

<b>Definitions:</b>		
<b>Term/"Horizon":</b> the estimated length of time needed to implement that tactic, from the time that specific tactic begins through its full implementation.	<b>Immediate = One time or within 6 months</b>	<b>Medium-term = 2-5 years</b>
	<b>Short-term = 6 months-2 years</b>	<b>Long-term = 5 years or more</b>
		<b>Ongoing = continous</b>
<b>Cost:</b> the estimated amount of <b>incremental</b> expense this tactic would require to fully implement. (Incremental above FY22 budget)	<b>None= no additional financial resources required</b>	<b>Medium = \$2,000 - \$10,000</b>
	<b>Low = &lt; \$2,000</b>	<b>High = \$10,000+</b>
Note: Tactics that would be one time costs are noted with a (1x), while costs that would be reoccurring annual expenses are noted with (R)		

Focus Area		Strategies/Tactics		Responsibility		Status	Reporting
		\$ Cost (Incremental)	Term ("Horizon")	Staff/ Company Members	Board	Updated to reflect implementation stage	Notes on how/when impact and progress will be reported
Training the Next Generation	Commit to training & diversifying next generation of production and front of house personnel at same level as we do for singers	High (R)	Med / Long	Production / Admin			
	Ensure diverse representation on the music staff, who are working directly with the young artists	None	Med	Artistic			
	Ensure more equitable access for the audition process - supporting personal expenses, sound/video quality, etc.	Med (R)	Med	Artistic			
	Reconfigure recruitment efforts to connect with more diverse GYA candidates	Med (R)	Short	Artistic			
	Explore audition requirements that allow broader access	Low (R)	Short	Artistic			
	Explore audition locations through a lens of access and equity	Low (R)	Short	Artistic			
	Provide housing for production crews	High (R)	Short	Production			
	Provide housing for administrative interns	High (R)	Short / Med	Admin			
	Expand training and mentorship opportunities for production artisans	High (R)	Med / Long	Production			
	Develop a mentorship program specifically for directors/designers	High (R)	Med / Long	Artistic / Production			
	Continue our investment in Clayco Future Leaders Fellowship	Low (R)	Ongoing	Admin			
	Grow our communication about the training of backstage and administrative roles	None	Med	Production / Marketing	Marketing Cmte / Full Board		
	Involve GYA Alumni in recruitment process	Mid (R)	Med	Artistic			
	Create robust alumni networks of the GYA, Browning, Emerson, and Clayco programs - continuing those relationships and support of alumni in their next steps.	Low (R )	Short	Admin / Artistic / Production			
	Using individuals in the alumni networks to advise on hiring and recruitment, and to connect and expand OTSL's network.	Low (R )	Med	Admin / Artistic / Production			

<b>Definitions:</b>		
<b>Term/"Horizon":</b> the estimated length of time needed to implement that tactic, from the time that specific tactic begins through its full implementation.	<b>Immediate = One time or within 6 months</b>	<b>Medium-term = 2-5 years</b>
	<b>Short-term = 6 months-2 years</b>	<b>Long-term = 5 years or more</b>
		<b>Ongoing = continous</b>
<b>Cost:</b> the estimated amount of <b>incremental</b> expense this tactic would require to fully implement. (Incremental above FY22 budget)	<b>None= no additional financial resources required</b>	<b>Medium = \$2,000 - \$10,000</b>
	<b>Low = &lt; \$2,000</b>	<b>High = \$10,000+</b>
<i>Note: Tactics that would be one time costs are noted with a (1x), while costs that would be reoccurring annual expenses are noted with (R)</i>		

Focus Area		Strategies/Tactics		Responsibility		Status	Reporting
		\$ Cost (Incremental)	Term ("Horizon")	Staff/ Company Members	Board	Updated to reflect implementation stage	Notes on how/when impact and progress will be reported
Audiences, Donors, & Community	Create an on-site atmosphere which feels obviously inclusive	Med ( R)	Med	All Depts / Front of House	EDI Cmte/ Marketing Cmte/ Young Friends		
	Train Front of House staff to encourage that all are welcome at picnics	None	Short	Front of House			
	Ensure accessibility for individuals with disabilities at all performances	Med ( R)	Med	Admin / Front of House			
	Cultivate and empower Board and volunteers to be ambassadors for inviting and welcoming all to the OTSL experience	None	Short / Med / Ongoing	Admin	Full Board / EDI Cmte / Guild		
	Ensure the "OTSL Family" is evermore inclusive and diverse, and the feeling of connection to the company is extended to new networks	None	Long	Admin / Advancement / Development / Marketing	Full Board / Marketing Committee / Guild / Eng & Inc Council		
	Develop clear and open language around how we talk about our work with the community (Community Partnerships or Learnings rather than Engagement or Outreach)	None	Short	Admin / Advancement / Marketing / Education			
	Develop and communicate explicit policies and practices for external constituents (audiences/patrons/donors)	None	Short	Admin / Advancement / Marketing			
	Send email to all ticket buyers with what to expect from their experience at OTSL (highlighting that all are welcomed at picnics, post-performace tent, etc.)	None	Imm	Marketing			
	Develop authentic relationships with community partners - not only transactional/topical	Med ( R)	Med / Long / Ongoing	Advancement	Eng & Incl Council		
	Build partnerships not solely built around specific productions	None	Med / Long / Ongoing	Advancement / Education	Eng & Incl Council		
	Engage with specific communities not only around tragic stories	None	Med / Long / Ongoing	Artistic / Advancement	Eng & Incl Council		

<b>Definitions:</b>		
<b>Term/"Horizon":</b> the estimated length of time needed to implement that tactic, from the time that specific tactic begins through its full implementation.	<b>Immediate = One time or within 6 months</b>	<b>Medium-term = 2-5 years</b>
	<b>Short-term = 6 months-2 years</b>	<b>Long-term = 5 years or more</b>
		<b>Ongoing = continous</b>
<b>Cost:</b> the estimated amount of <b>incremental</b> expense this tactic would require to fully implement. (Incremental above FY22 budget)	<b>None= no additional financial resources required</b>	<b>Medium = \$2,000 - \$10,000</b>
	<b>Low = &lt; \$2,000</b>	<b>High = \$10,000+</b>
<i>Note: Tactics that would be one time costs are noted with a (1x), while costs that would be reoccurring annual expenses are noted with (R)</i>		

Focus Area		Strategies/Tactics		Responsibility		Status	Reporting
		\$ Cost (Incremental)	Term ("Horizon")	Staff/ Company Members	Board	Updated to reflect implementation stage	Notes on how/when impact and progress will be reported
Education Programming	Offer mentorship opportunities from our staff - production guidance for high school or community theatre programs, development/marketing mentorship for high school and college students	Low ( R)	Med	Education / Development / Marketing / Production / Admin			
	Develop specific programming about de-mystifying opera experience	Med ( R)	Med	Education / Advancement / Artistic			
	Identify specific audiences for all education programs and plans for how to reach those communities	None	Short	Education			
	Create an Education Task Force of diverse education experts to inform programming based on the needs of the students and educators	Low (1)	Short	Education	Gov Cmte / Executive Cmte		
	Explore more education representation in the board and committee structure	None	Short / Med		Gov Cmte / Executive Cmte		
	Create content that reflects the communities with which we are sharing these programs and resources	Med ( R)	Short	Education / Artistic / Advancement			
	Partner with community organizations to develop programming for more audiences, including: early childhood, senior adults, persons w/ disabilities, single-parents	High ( R)	Med / Long / Ongoing	Education / Advancement	Engagement & Inclusion Council /		
	Connect with schools and community theatre/music programs to highlight and educate about careers in arts administration and production (not just performance careers)	Med ( R)	Med / Long / Ongoing	Education / Production / Admin			