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Antecedents and Consequences

Organizing for Improvisation: The Backstage Story of the Vancouver Jazz Concert and Symposium

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= = = = =
Date: Sat, 27 Aug 94 11:09:06 PDT
From: Mary Jo Hatch
(mhatch@sciences.sdsu.edu)
To: Alan Meyer
(ameyer@oregon.uoregon.edu)
Subject: jazz workshop

Alan--You asked for innovative ideas for next year's [Academy of Management] conference in Vancouver. Frank Barrett and I have been cooking one up that you might be willing to entertain. We've been talking about presenting some jazz and then switching to a discussion format to translate concepts and performances from the jazz context into the management context. . . . we want to illustrate some essential ideas like groove, feel, and perhaps trainwreck. . . . Is there any funding available for such things? Frank will be on keyboards (he played with the Tommy Dorsey Band) and my husband Doug is a professional drummer, but we will probably need to hire a local bass player and rent a sound system. . . .

Well, these are some very rough thoughts stimulated by your recent request for ideas. If you are interested, I would love to hear from you. I am in the middle of moving to Denmark, so I'll send you my

new email address soon. Thanks for any thoughts you have about this.
Regards, Mary Jo

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Some small causes have big effects. When Mary Jo Hatch interrupted her packing to send me this e-mail message, she did not know that she was setting in motion a chain of events leading to the jazz concert and symposium staged at the Academy of Management's 1995 conference in Vancouver, British Columbia—and ultimately to this special issue of *Organization Science*.

Mary Jo's message started an e-mail conversation around the jazz event that lasted nearly one year, branching out to include scores of members and officers of the Academy. The crescendo was a superlative performance by a jazz quartet featuring recording artist Ken Peplowski, attended by a crowd of about 1,000. Music was interspersed with reflections of academicians and musicians on the links between jazz improvisation and the organizing process. The costs of staging the event were shared by three divisions and one interest group in the Academy, and by Mary Jo's new employer, the Copenhagen School of Business. Some who attended said the event was the intellectual, aesthetic, and social highlight of the four-day conference.

In my role as Program Chair for the event's principal sponsor, the Academy's Organization and Management Theory Division, I had a hand in the planning, scheduling, funding, and staging of the Vancouver jazz symposium.

What follows is the backstage story. I believe it affords a good illustration of people applying the jazz improvisation metaphor to the work of organizing.

Improvising on Weak Ties

The symposium and concert were organized and performed by people linked by surprisingly weak and diverse social, professional, and musical ties. In his former life, Frank Barrett, now an Associate Professor at the Naval Postgraduate School, had been a professional jazz pianist. Frank played with Ken Peplowski in the 1970s, but they'd been out of touch for 12 years. Frank and Mary Jo met at an academic conference in the 1980s and struck up a friendship based on their mutual interest in jazz (Jo's husband, Doug Conner, is a jazz drummer and song writer). Neither Doug (who played drums in Vancouver) nor René Worst (who played bass) had met any of the other musicians. Steve Havlovic (Local Arrangements Chair) had no personal ties to anyone. Jo and I were introduced at a 1988 conference but had no further contact prior to her 1994 e-mail message. Frank and I had never laid eyes on each other until we met in Vancouver on the afternoon of the event.

Moreover, the jazz event was planned entirely through e-mail messages, supplemented by occasional telephone calls. The three key academicians (Hatch, Barrett, and myself) lived on two continents separated by 8 time zones. In addition to e-mailing each other, we e-mailed officers of the four co-sponsoring divisions, the President, Past-President, and National Program Chair of the Academy of Management, and colleagues scheduled to present in the symposium. In total, we exchanged over 200 e-mail messages, nearly all of which I have retained in a computer file. At the beginning of the conversation, Jo, Frank, and I agreed that in order to achieve minimal coordination, we would send each other copies of all jazz-related messages. Although this agreement was violated occasionally (mostly inadvertently, although intentionally in a few cases), my e-mail file constitutes a fairly complete record of the event's planning, albeit one overstating my centrality in the emergent communication network. Table 1 shows the number of archived messages sent and received by the key individuals and groups involved in planning the symposium and concert. These data were extracted from e-mail headers indicating senders, recipients, and others receiving copies of messages. The table's first column shows the number of messages originating from various individuals and groups. The second column shows the number of messages received by these same individuals and groups. The number of incoming messages was over twice the number of outgoing

Table 1 Senders and Recipients of Jazz E-mail

Individual/Group*	Number of Outgoing Messages	Number of Incoming Messages
Alan Meyer	56	87
Mary Jo Hatch	42	69
Frank Barrett	25	55
Steve Havlovic	10	18
OMT Officers	36	94
MOC/OB/ODC Officers	14	72
AOM Officers	5	14
Symposium Presenters	9	31
Totals	197	440

*The four groups shown are (1) officers of the Academy of Management's Organization and Management Theory Division (OMT); (2) officers of the other co-sponsoring Divisions; Managerial and Organizational Cognition (MOC), Organizational Behavior (OB), and Organizational Development and Change (ODC); (3) National Officers of the Academy of Management (AOM); [4] scholars scheduled to make presentations in the jazz symposium.

messages, indicative of the one-to-many communication capability of e-mail.

Chronology

Table 2 highlights key events in the year-long process of planning the jazz symposium and lining up institutional support and funding. Over this period, the small workshop that Jo and Frank initially envisioned evolved into an elaborate intellectual, musical, and social production. The notion of asking amateur musicians to hold an acoustic jam session came to fruition in a professionally-staged performance featuring an internationally acclaimed jazz artist. As aspirations for the event grew and costs escalated, we invited other divisions of the Academy to become co-sponsors, laid plans to follow the symposium with a concert that could capitalize on the musical talent assembled, and arranged for a buffet and bar service to create a cabaret ambiance.

Early in January, the symposium and concert were approved for inclusion in the conference program, but support for the undertaking within the co-sponsoring AOM divisions was fading; concerns about the propriety of spending members' dues to stage a jazz concert had surfaced, and the necessity of hiring "world-class musicians" was being questioned by some participants.

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 . . . \$4200 is an astronomical figure
 for an Academy event. While I like the

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Table 2 Evolution of the Vancouver Jazz Symposium and Concert

8/27	Mary Jo Hatch e-mails Alan Meyer proposing that she and Frank Barrett develop live jazz improvisation session at Vancouver Academy of Management (AOM) conference.
11/8	Meyer recommends pitching event to AOM as "Showcase Symposium" co-sponsored by Organization and Management Theory Division (OMT) and Managerial and Organizational Cognition (MOC).
12/8	Barrett suggests forming quartet by including Ken Peplowski, saxophone/clarinet jazz artist with Concord Records.
12/14	Jim Walsh (OMT Chair) proposes expanding to a concert and major social event and suggests inviting Organizational Behavior (OB) Division to co-sponsor.
1/10	Proposal for jazz symposium submitted jointly to OMT, MOC, and OB Divisions.
1/16	Proposal accepted as showcase symposium, Mike Hitt (AOM President) approves jazz concert, both events are booked into Vancouver Convention Centre Ballroom.
1/20	Concerns surface about cost of hiring "world-class musicians," and about using AOM members' dues to underwrite entertainment.
2/14	Organizational Development and Change Division (ODC) agrees to help fund symposium/concert, and Hitt agrees to list ODC in program as a co-sponsor.
2/23	Ken Peplowski agrees to fly from his prior engagement in London to participate.
4/20	Cost overruns cause Barrett to cancel advance trip to Vancouver to arrange local staging and hire bass player as sideman for the quartet.
5/7	Steve Havlovic (Local Arrangements Chair) steps in to recruit bass player and handle staging arrangements.
6/20	Sound system is estimated to cost about \$2,200.
7/10	B.C. Provincial Liquor Commission refuses to allow bar service unless roughly \$5,000 is spent for food.
7/14	Havlovic persuades Brad Reid (sound engineer) to provide sound system below cost (\$700), negotiates bar service with only \$1,500 spent for accompanying food service.
7/25	Copenhagen Business School agrees to fund sizable budget deficit.
8/8	Presentation of showcase symposium, jazz concert, and social reception.

idea of world-class musicians. . . . I don't think we can afford them and should say so. Surely there are musicians in the academy? People who might get a kick out of playing. . . . or others in the Vancouver area known to UBC people who would play gratis if we could just get light/sound essentials covered . . . My advice is to make a go of it, but if Mary Jo is the proposer, then ask her to get the budget down. . . . , waaaay down.

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In a passionate rejoinder, Mary Jo argued that the symposium's integrity depended on jazz virtuosity.

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On the world-class sax player front-- jazz, like any other art form, communicates in ways that are subtle and not always at the level of intellectual analysis we academics are so fond of. Bad jazz, even mediocre jazz is not really jazz at all. Many of the points we are making rely upon the comparison with "true" jazz for their force, to illustrate with something that sounds to the uninitiated "like" jazz is to miss

the whole point. Even if the audience's appreciation is not honed to the level of full appreciation of the intricacies and subtleties, it is still important to be exposed to them.

Inspiration is at stake. Intuitive understanding. We are shifting the focus of analysis from intellect to aesthetic. Yes, it does matter! It matters a great deal. Besides, there will be many in the audience who DO know the difference. Do you guys want to be guilty of putting on a non-quality Showcase? Have I convinced you yet? Hope so.

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Although the case for including a jazz luminary carried the day, concerns about lavish expenditures for "entertainment" continued to surface, as did bickering about which division would get "credit" for the event. Fortunately, additional financial support was promised in mid-February, and by month's end, Ken Peplowski—a renowned jazz saxophone and clarinet artist—had committed to play the engagement for a fraction of his usual fee.

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. . . My sense is that if this all comes together--good setting, stimulating intellectual foundation, audience participation, and finally great music over a few cocktails--then somehow we can find the money to make it happen.

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But over the next several months, cost estimates spiraled and a deficit loomed. In April, the budget crisis forced co-organizer Frank Barrett to cancel an advance trip to Vancouver to arrange for staging the concert and to hire a local bass player. In late June, we learned that renting a suitable sound system would cost nearly \$1,500 more than we'd budgeted. Then on July 10, with the event just three weeks away, the Vancouver Conference Centre told us that their liquor license precluded bar service unless we also served food, and announced that an expenditure of \$10 per attendee was needed.

As the news spread through the network, one divisional officer proposed canceling the concert, cutting our losses, and going back to a small symposium with acoustic music. This idea triggered angry responses, and elicited the following exchange about the merits of posting all messages to distribution lists.

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. . . My approach to planning this and negotiating co-sponsorship by the four divisions has been to copy all messages to everybody. I thought this would keep everything in the open, build trust, and so on. But it doesn't seem to be working anymore.

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. . . with e-mail, so many people can get involved so quickly, that the potential for broad scale misunderstanding is high. Let's talk by phone before we make this worse!!

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The event was on the verge of collapse. We turned to the president of the Academy; he was supportive, but had no discretionary funds to tap. Officers of the co-sponsoring divisions were reluctant to commit additional money to the event, and began questioning each other's motives. A year's planning seemed about to go up in smoke, leaving the organizers holding the bag with thousands of dollars in unrefundable expenditures.

= = = = =

The symposium as we have planned it would be a winner. But now everything is coming unraveled. Frank and I are exhausted from all the stress of putting this thing together and we will simply expire if it was all in vain. What a mess!

= = = = =

In the "coda" to this issue, Frank Barrett notes that jazz musicians "often find themselves in the middle of messes." So, it seems, do the organizers of academic improvisations.

But in the proverbial nick of time, Steve Havlovic and Brad Reid stepped in to help salvage the event. Steve was the conference's Local Arrangements Chair, and Brad is a Vancouver-based sound engineer and musical producer. Each took on the successful staging of the jazz event as a personal mission, devising resourceful solutions to intractable problems, tapping their professional networks to enlist associates' help in the enterprise, and doing all this voluntarily, unobtrusively, and for no ostensible reward. A few days later, the Copenhagen Business School generously offered to cover the concert's substantial deficit, enabling the event to come off successfully.

Delving into the Archives

I content analyzed the archived e-mail messages to provide a window into the planning process leading up to the jazz event. The data consist of 5,273 lines of typed text, not including e-mail headers or signatures. 1,266 of these lines duplicated text from earlier messages (e-mail programs often include a "reply" subroutine which automatically reproduces the message eliciting the response, and some senders "forward" or "paste in" text from prior messages). This duplicated text was not coded to avoid double counting. The remaining 4,007 lines of text were then content analyzed. A coding scheme was developed around two overarching categories: Content Codes, which reflected the topics being discussed, and Affect Codes, which reflected the emotions displayed in the text. The overarching Content Code was composed of the following five subcodes: Intellectual/Academic, Jazz/Music, Funding, Logistics, AOM Bureaucracy, and AOM Divisions. The overarching Affect Code included five subcodes: Euphoria/Enthusiasm, Praise, Criticism, Discouragement, and Anger. The line of text was the unit of analysis in coding, and a code was attached to each line in which the associated topic or emotion was judged to be present. Where appropriate, more than one code could be attached to the same line. Established procedures were

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used in training a graduate student coder, verifying her work, and assessing reliability.¹ One or more of the coding subcategories were judged to fit 2,738 of the 4,007 lines coded. The lines left uncoded consisted mainly of salutations, banter, and discourse unrelated to the jazz event.

Content and Affect

Table 3 summarizes the content analysis results. In terms of substantive topics, more than one-third of the e-mail stream dealt with “Rules and Logistics” (AOM rules governing evaluation, selection, and scheduling of program submissions; efforts to line up equipment and facilities for the event; and coordination between the four co-sponsoring Academy divisions). These matters proved unexpectedly time consuming, as the Academy of Management is, in many respects, an organization “where routine embellishment of routines is sufficient and expected and where surprise is unwelcome” (Weick, p. 546, this issue).

About one-fourth of the conversation dealt with “Funding and Budgets”: estimating costs, negotiating, and soliciting financial support. Another one-fourth of the conversation concerned jazz, improvisation, and other intellectual issues.

Turning to affect, the table suggests that about one-sixth of the e-mail stream displayed positive affect: expressions of enthusiasm for the event and/or the planning

process, and statements praising various participants’ ideas and actions. Fewer than one-twelfth of the lines coded displayed negative affect: despondence about difficulties encountered, criticism of those held responsible, and expressions of frustration and anger.

As the e-mail exchange unfolded over the 11-month period, there was variation in the sheer volume of communication, the topics under discussion, and the emotions expressed. As shown in Figure 1, e-mail volume peaked twice, with one spike coming in November shortly before the deadline for submitting the symposium proposal for review, and the other in July, the month preceding the conference.

Figure 2 suggests how content and affect shifted over time. To control for the fluctuations in overall e-mail volume, this figure graphs two content and two affect categories as a proportion of the number of message lines sent during each month.² The share of discussion devoted to jazz and ideas peaked in two distinct waves, both accompanied by a surge of positive affect. But each case, exuberant talk about jazz and ideas gave way to the topics of budgets and funding, and when the talk turned to money, it was accompanied by expressions of negative emotions.

Coordinating Spontaneously

Both on stage and behind the scenes, coordination of the jazz symposium was spontaneous, non-hierarchical, and organic. In the afterglow of the concert, Peplowski, Barrett, Conner, and Worst reported feeling delighted and a little surprised that the band had, in fact, “achieved a groove” on stage, despite having never played together before, and with only 30 minutes for a sound check and rehearsal. They wondered how many people in the audience fully understood and appreciated this singular accomplishment. We academic participants—marveling at our own triumph over bureaucratic, regulatory, and political setbacks—agreed that the audience certainly had no idea what had been necessary to bring it off.

Doug Conner remarked that this feeling is familiar to every jazz musician: “Some people think you’re just up there goofing around—they can’t see the foundations. But you’ve got to have the chops plus years and years of experience, and you’re dependent on the good will of all those who came before you.” Deliberate improvisation is—as Weick notes in this issue—tough, time-consuming, and places high demands on resources.

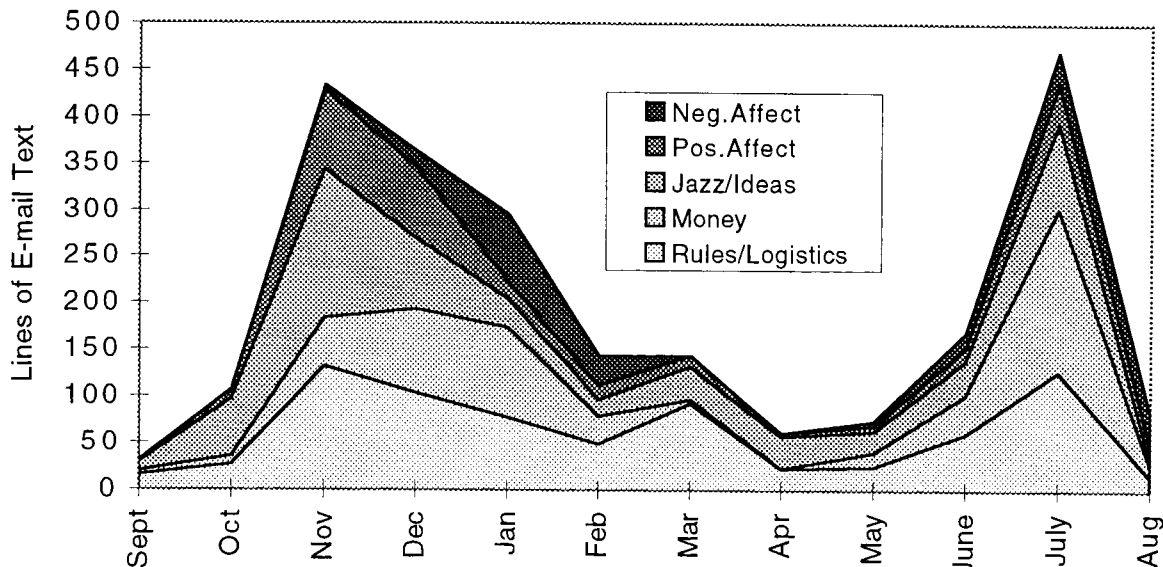
Electronic “Yes-anding” and the “Switch”

The jazz symposium organizing process moved forward in a way that bears a close resemblance to the improv

Table 3 Content and Affect in E-mail

Coding Categories	Lines Receiving Codes (% of coded lines)		
Content Codes	2,227 (87%)		
Rules and Logistics	892 (35%)		
• Logistics		629 (25%)	
• AOM Divisions		166 (6%)	
• AOM Bureaucracy		97 (4%)	
Funding and Budgets	674 (26%)	674 (26%)	
Jazz and Ideas	661 (26%)		
• Jazz/Music		343 (13%)	
• Intellectual/Academic		318 (12%)	
Affect Codes	514 (20%)		
Positive Affect	338 (13%)		
• Euphoria/Enthusiasm		190 (7%)	
• Praise		148 (6%)	
Negative Affect	158 (6%)		
• Criticism		29 (1%)	
• Despondence		102 (4%)	
• Anger		45 (2%)	
Total	2741	2741	2741

Figure 1 E-mail Volume over Time



theater principle of “yes-anding”, which Mary Crossan describes in this issue as “the heart of improvisation.”

[Yes-anding] means that individuals accept the offer made to them and build on it. It means that . . . individuals do not impose themselves on the scene in a controlling fashion; . . . do not just survive in the scene, but work actively to build it; do not put, or leave, one another out on a limb. (pp. 596–597)

The following e-mail exchange is a good example of “yes-anding”.

```

=====
Date: Tue, 13 Dec 1994 00:53:01 -0500 (EST)
From: Claudia.B.Schoonhoven@Dartmouth.EDU (Claudia B. Schoonhoven)
Subject: Re: Jazz in Vancouver!
To: ameyer@OREGON.UOREGON.EDU (Alan Meyer)
    
```

Alan, The jazz session sounds spectacular! Believe it or not, I had planned to e-mail you today about process innovation & the heavens & planets are all aligned & this is all HAPPENING. The jazz session will be fantastic: we have the money. The Academy Board is encouraging the divisions to use their extra \$ allocation for wonderful events & this would be a clear, clear winner. Congratulations! Feel free to share my enthusiasm with others.

```

=====
Date: Wed, 14 Dec 1994 19:18:10 -0500 (EST)
From: Jim Walsh (Jim_Walsh@ccmail.bus.umich.edu)
Subject: Re: Jazz in Vancouver!
To: [11 OMT officers, Hatch, and Barrett]
    
```

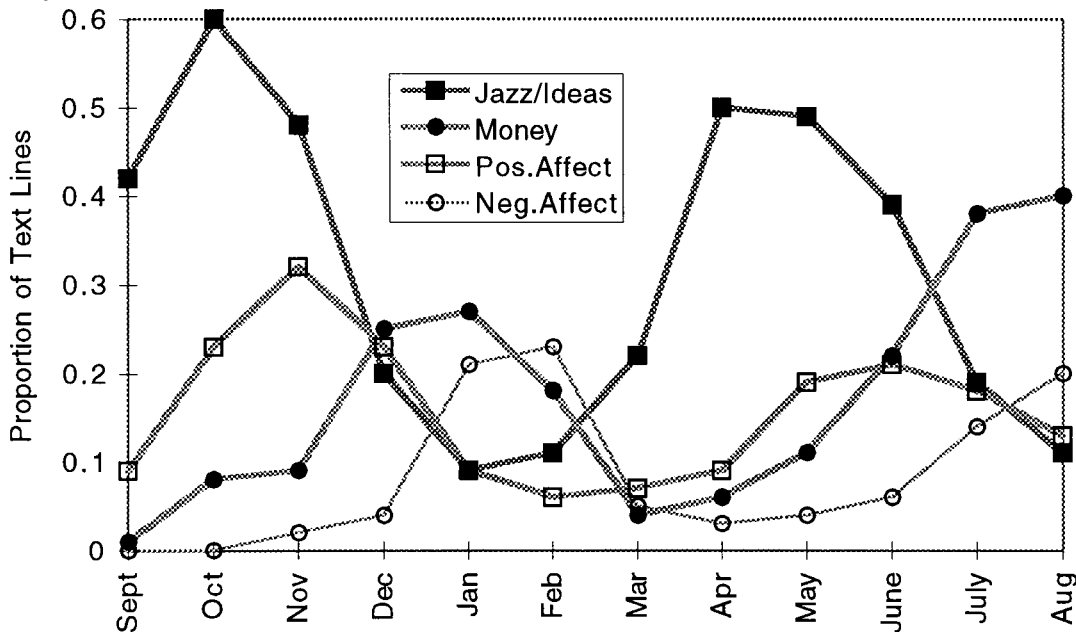
I think it is a GREAT idea. We should definitely pursue it as a showcase. Why don't we invite OB to share this experience (and expense) with us? Now that the OB dance is history, they might be game to do something creative like this. And why not consider extending this into the evening and having it serve as a kind of OT-OB-MOC social event? But if we were going to offer this kind of entertainment, then we need to be sure that the musical quality is there.

```

=====
Date: Fri, 17 Feb 1995 08:48:36 -0600 (CST)
From: Mike Hitt (J155MH@tamvm1.tamu.edu)
Subject: Jazz Showcase and Concert
To: Alan Meyer (ameyer@OREGON.UOREGON.EDU)
    
```

Alan:
I am pleased that you were able to obtain a higher commitment from the OB division, thus making the sponsorship of the special jazz session more equitably distributed across the divisions. I will

Figure 2 Topics and Emotions over Time



book your symposium and concert into the convention centre ballroom. I am pleased with this particular session and frankly, look forward to attending it myself.
Mike.

in all, I'd say that the pieces have fallen into place.

=====

This exchange, along with many others, injected innovation and built enthusiasm and commitment for the jazz project. But when unexpected setbacks brought the process to a halt, "yes-anding" was not enough to regain lost momentum. Crossan also writes (p. 596, this issue) "a key characteristic of improvisation is that individuals take different leads at different times," and she describes an improv exercise called "Switch" wherein an onlooking member of the ensemble can freeze a scene in progress, replace one of the players, and then unfreeze the scene by taking it in a new direction. In organizing the jazz event, Steve Havlovic "switched", slipping into Frank Barrett's role in hiring bassist René Worst. René soon took it upon himself to borrow a drum set for Doug Conner's use, and Brad Reid unearthed a professional soundboard, speakers, and microphones.

Constantly Triumphant and Failing

What motivated Havlovic, Worst, Reid, and their associates to labor behind the scenes to stage the event? Some clues are to be found in Peter Frost's interview with Havlovic (see "Unsung Heroes", pp. 577-582, this issue). He attributes it to a mixture of bonding, teamwork, determination, professionalism, and luck. But a more intriguing answer is that those involved in arranging for the

Date: Mon, 20 Feb 1995 14:09:45 -0800
From: Alan Meyer (ameyer@OREGON.UOREGON.EDU)
Subject: Jazz
To: [11 OMT officers, MOC officers, AOM officers]

Hello all. . . . Thanks for everyone's input! As currently conceived, the jazz session will start after the regular program ends . . . opening with a few jazz riffs, and then shifting to focus on intellectual issues (jazz theory, postmodernism, improvisation, etc.), then moving into a more free-form mode (as musically inclined academy members join the jam), and shifting again into a purely social/musical event (as the cash bars open and the party animals emerge from their lairs). This will help justify the costs of bringing in the "world class" musicians needed to really give the session pizzazz. And the musicians will be happy to get more playing time and an appreciative audience. Mike Hitt has booked us into the ballroom, capacity over 1,000. All

event emulated jazz musicians' approach to improvisation.

Anticipating the advice that would later be offered by Ken Peplowski in Vancouver (pp. 560–561, this issue), the organizers had faked confidence, taken turns, listened to each other carefully, and commented on what they were hearing. As with good jazz, organizing the event was a widely distributed task and an ongoing social accomplishment. Like the best jazz, this organizing was self-referential and recursive. By embracing errors and incorporating them into the planning process, the organizers helped to deliver on the symposium's promise:

The Organization and Management Theory Division, in collaboration with MOC, OB, and ODC will host an event in Vancouver blending intellectual stimulation, sensory arousal, aesthetic experience, and revelry. This showcase symposium will

declare that in the 21st century, effective organizations must emulate jazz bands. Jazz improvisation collapses many dualities that hamper coordination in other forms of organized life, avoiding division of labor and spatial or temporal separation. There is no split between composition and performance; no split between creator and interpreter; no split between design and production. This cuts coordination problems and it saves time—a precious commodity in a fast-changing world.

Academy of Management News

Endnotes

¹When a 10-percent sample of the lines of text was independently coded by a second coder, 263 of 400 lines (66%) received identical codes.

²The number of lines about rules and logistics maintained a fairly constant proportion over time, and therefore are not shown in Figure 2.