

## **2026 National Conference Agenda—Finance**

*All times below are Eastern Time. Agenda content subject to change.*

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The following agenda describes sessions specifically designed for the above-mentioned constituents. For a full listing of Conference events and larger sessions, please visit <https://leagueconference.org/full-schedule>.

### **Monday, June 1, 2026**

#### **1:00pm-2:30pm    Constituency Meeting Block 1**

#### **1:00pm-1:15pm    Welcome, Sponsor Remarks, and Introductions**

We'll start our time together with introductions and will share our biggest successes and challenges of the past year. Come ready to celebrate and commiserate.

#### **1:15pm-2:15pm    Building, Governing, and Growing Endowments and Investments in Today's Environment**

Led by [Amy Seto](#), [Catherine Campbell](#) and [Gordon Wagner](#) from [Brown Advisory](#), this session will demystify the practical considerations of launching an endowment, including accounting, audit implications, liquidity management, and investment oversight. For CFOs with existing endowments, the discussion will expand to governance best practices, fiduciary responsibility, and strategies for sustaining and growing assets amid today's economic and political uncertainty.

Participants will also explore modern oversight models, including the role of an Outsourced Chief Investment Officer (OCIO), and how to evaluate whether such an approach aligns with their organization's scale and risk tolerance.

2:15pm-2:30pm **Wrap Up and Conference Plans**

We'll plan how we want to structure our Conference constituency time and how to make the most out of your attendance.

**Tuesday, June 2, 2026**

**3:00pm-5:00pm Constituency Meeting Block 2**

3:00pm-4:00pm **Navigating the Current Financial Market**

**Quick Review of OSR Results**

A walk through of the recently published results of OSR25

**Peer To Peer Conversation**

This peer-to-peer discussion session will focus on the current financial market. We'll reflect on the economic conditions of the past year, the current financial health of our orchestras, and look to the future to discuss key financial planning strategies and protective measures in response to evolving market conditions.

4:00pm-5:00pm **Workforce Management and Capacity**

An open discussion about current workforce challenges, including attracting and retaining skilled staff, unaffordability of salary against rising living costs, and how to maintain efficiency.

**Wednesday, June 3, 2026**

**11:15am-12:45pm Constituency Meeting Block 3**

11:15am-12:15pm **AI Policy and Finance Applications**

Continue/re-introduce the topic of policy adoption; basics of AI types and commonly used tools; then 30 minutes of interactive presentation around potential Finance applications.

12:15pm-12:45pm **Reflections, Commitments and Staying Connected**

What are you taking home from Conference? Each person shares one concrete action item or takeaway. Exchange contact information for ongoing peer support and discuss whether the group wants

to establish any between-Conference check-ins (a quarterly call, a shared resource list, etc.).

*Finance Constituency Meetings have been generously sponsored by AccountingWare*

Notice: It is important to keep in mind antitrust rules governing competition that apply to this group discussion. While the agenda for this group includes discussion of a variety of issues that are crucial to orchestras' planning and strategies, the goal is not to agree on a single approach to these issues. With the benefit of analysis and discussion, each orchestra will be able to decide independently what course of action is best for its own organization. We ask you to avoid comments that relate to your orchestra's current or future plans for ticket or event pricing (actual ticket prices, discount amounts), bargaining (including collective bargaining agreements or with vendors), or compensation. Please consult the [League one-page Antitrust Overview](#) for more information, available at [www.americanorchestras.org](http://www.americanorchestras.org).