

## Midwinter Managers Meeting Agenda – Groups 7-8

**Constituent Liaison:** Najean Lee, Director of Government Affairs & Education Advocacy  
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### Monday, January 31, 2022

#### Groups 7-8 Meeting – all times below are Eastern

**1:00pm-2:00pm**

**Opening Session: Courageous Leadership with Nancy F. Koehn**  
*Sponsored by Threshold Acoustics*

Midwinter Managers Meeting opens with a presentation by Harvard Business School professor Nancy F. Koehn, whose research focuses on crisis leadership and how leaders and their teams rise to the challenges of high-stakes situations. She will explore the larger context of courageous leadership two years into a global pandemic—a pandemic that has unleashed other crises and that shows little sign of abating.

We will examine some of the key rules of the road for leaders in several sectors, including nonprofits. These tools and behaviors center on leading yourself during turbulent times, accessing and stoking resilience among your team members, taking stock of what you and your organization have learned during the past two years, and injecting credible hope and inspiration into your people.

The session will include time for questions, answers, and reflections.

*Nancy F. Koehn, Historian, James E. Robison chair of Business Administration, Harvard Business School*

2:15pm-3:15pm

## Cross-Constituency Roundtable Discussions – *Choose One*

### **Leadership and Audience Building**

Audience attitudes to a return to the concert hall remain fragmented and difficult to predict. How do we cultivate engagement and loyalty in this still-shifting environment? What steps can we take to encourage our audiences to feel comfortable returning? And how might we reimagine our traditional ticket and subscription products to respond to changing audience needs? Join us to share tactics and ideas with your peers from across the country.

*David Snead, President and CEO, Handel & Haydn Society*

### **Leadership and Fundraising**

Fundraising conventions have been upended by the need to work in an online world. As we return to in-person fundraising events and cultivation, how do we rebuild the dynamic of live connection? Which donor segments offer the greatest latent fundraising potential? And what are the opportunities to benefit from what we've learned from fundraising online? Join us for a practical conversation with EDs from all budget groups.

*Giuliano Kornberg, Executive Director Designate, Sacramento Philharmonic & Opera*

### **Leadership and the Digital Future**

Two thirds of orchestra audiences see digital content as part of their future cultural lives, beyond the pandemic. Yet the challenges of sustaining and monetizing a digital content offer are profound. What digital content strategies and tactics are working? How do we determine the right approach for our organization? And beyond the music, what have we learned about digital storytelling as a tool for community and audience engagement? Join us to discuss practical steps towards our digital futures, with colleagues from across the field.

*Jessica Satava, Executive Director, Johnstown Symphony Orchestra*

### **Leadership and Equity, Diversity, and Inclusion**

Wherever we begin in our equity, diversity, and inclusion (EDI) work, it often becomes both more complex and more challenging as our journey continues. How do we embed our shared values, both in strategy and in programmatic work? How do we sustain commitment across the organization, as staffing and leadership changes over time? And how do we make sense of our own

progress and learning? Join us to learn with EDs from orchestras at all stages of their EDI journey.

*Karina Bharne, Executive Director, Symphony Tacoma*

### **Leadership and Financial Planning**

Looking ahead to FY23 and beyond, many of us face our most significant financial challenges yet. As we contemplate lasting change to our audiences, our business models, our programming, and even our mission, how can financial planning help us navigate the future? What tools and tactics have our colleagues successfully employed? And how can the approaches we choose help to build organizational alignment and cohesion, as we move through this time of change? Join your colleagues from across the country to share experiences and expertise.

*Jeff Alexander, President, Chicago Symphony Orchestra*

**3:30pm-5:00pm**

### **The Self-Caring Leader** (*Joint Constituency Meeting for Groups 5-6 and 7-8*)

Managers are weathering a particularly intense period of change, stress, and uncertainty. Self-care has become a buzzword, but what does this actually mean, and why is it important? How can managers prioritize their own needs, reset what needs resetting, and discern what serves our organizations, staff, and community in ways that are healthy and sustainable?

John McCann will lead us through a cross-constituency conversation that invites us to pause, self-assess, and question our values, our approach to work, and what the role of the CEO ought to be vs. what it has always been assumed to be.

*John McCann, President, Partners in Performance*

**Tuesday, February 1, 2022**

**Groups 7-8 Meeting**

**12:00pm-1:00pm**

**Innovation Session: Executive Leadership as a Catalyst to Understanding and Motivating Major Donors**

*Sponsored by Arts Consulting Group*

The communication styles and motivations of major donors can be a mystery at times. Learn how to more carefully listen to and observe donor behaviors to inspire support for your orchestra.

*Bruce Thibodeau, Nan Keeton, and Wyona Lynch-McWhite, Arts Consulting Group*

**1:15pm-2:15pm**

**Cross-Constituency Roundtable Discussions – *Choose One***

Monday sessions repeat

**2:30pm-3:30pm**

**Longer-term Fundraising (Groups 7-8)**

Have fundraising standards, benchmarks, and practices changed due to COVID? What kind of resetting, re-calibration, or reinstating might be needed to get onto more secure footing?

New York Philharmonic fundraiser Christine Mickletz will speak about the issues you may be facing when it comes to fundraising in the medium- and long-term. She'll cover how to devise attractive campaigns, assessing the landscape for legacy giving, setting realistic goals, and checking on the fundamentals of endowments.

*Christine Mickletz, Director, Gift Planning and Partnerships, New York Philharmonic*

**3:30pm-3:45pm**

***Break***

**3:45pm-5:15pm**

**The Constructive Partnership: Board & CEO (Groups 7-8)**

Led by Katha Kissman, author of [Taming the Troublesome Board Member](#) and [Trouble at the Top: The Nonprofit Board's Guide to an Imperfect CEO](#) (BoardSource), this session will delve into various aspects of the critically important Board/CEO relationship. How can both sides of this equation be optimized? How can we help board members understand their roles and stay on task? What can EDs do to understand and support the board's fiduciary governance role on the one hand and subtly manage up when necessary?

*Katha Kissman, Senior Governance Consultant, BoardSource*

**5:15pm-5:30pm**

**Lightning Round Updates & Looking Ahead (Groups 7-8)**

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*The Midwinter Managers Meeting Opening Session has been graciously sponsored  
by Threshold Acoustics*

*The session on Executive Leadership as a Catalyst to Understanding and Motivating  
Major Donors has been graciously sponsored by Arts Consulting Group*

*Additional generous support for Midwinter provided by Boomerang Carnets | CIB*