

Midwinter Managers Meeting—Groups 3-4

All times below are Eastern. Agenda subject to change.

Constituent Liaison: Caen Thomason-Redus, Vice President, Inclusion & Learning
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Meeting Location: The Westin New York at Times Square
270 W. 43rd St, New York 10036

Sunday, January 26, 2025

12:00pm-6:00pm **Registration**
New York Atrium, 9th Floor

1:00pm-3:45pm **Group 3-4 Meeting**
Palace, 9th Floor

1:00pm-1:10pm **Welcome and League updates**

1:10pm-2:50pm **Grounding Session**
As we enter into our sessions on various aspects of financial planning, please be prepared to share the following:

- What is your biggest financial challenge right now?
- What, if changed, would significantly help your financial picture?
- What would be the most impactful financial activity that you could undertake in the next six months?

2:50pm-3:00pm **Break**

3:00pm-3:45pm **Informing Financial Planning with Data from the OSR**
Discuss how to make the best use of the updated Orchestral Statistical Report and how to pair it with other findings, such as those in the TRG Arts & Culture Benchmark.

Andrew Anzel, Director, Knowledge Center, League of American Orchestras

3:45pm-4:00pm **Break**

4:00pm-5:00pm **General Session**, featuring keynote by Dean Erika James
Broadway Ballroom, 3rd Floor

Erika James, Dean of Wharton School, University of Pennsylvania.
Simon Woods, President and CEO, League of American Orchestras

Sponsored by Sametz Blackstone Associates

5:00pm-6:00pm **Welcome Reception**
New York Atrium, 9th Floor

Sponsored by Boomerang Carnets | CIB

7:00pm **Group Dinner**
Nearby location TBD

Monday, January 27, 2025

7:30am-11:00am **Registration**
New York Atrium, 9th Floor

8:00am-9:00am **Networking Breakfast**
New York Atrium, 9th Floor

Sponsored by Schiedmayer Celesta GmbH

9:00am-4:00pm **Group 3-4 Meetings (cont.)**
Palace, 9th Floor

9:00am-10:00am **The Legal Landscape around Equity, Diversity, and Inclusion**
Simon Woods, President and CEO, League of American Orchestras
Heather Noonan, Vice President for Advocacy, League of American Orchestras
Alexander Reid, Partner, BakerHostetler
<https://www.bakerlaw.com/professionals/alexander-l-reid/>

10:00am-10:15am **Break**

10:15am-12:00pm **Financial Planning Part 2**
This session will outline a comprehensive approach to ensuring the long-term sustainability of your orchestra. We will explore how strategic budgeting can optimize resource allocation, the potential of diverse revenue streams to increase financial stability preparing your organization for future challenges and opportunities. Group discussion will follow.

C. Lorenzo Evans III, Principal, CLE Business Services

12:00pm-1:30pm

Lunch (on your own)

1:30pm-2:45pm

Open Topic(s)

2:45pm-3:45pm

Visioning

Based on the discussions had, each member of this group will come up with no more than two but no less than one actionable item to work on with respect to finances for the next six months.

4:00pm-5:00pm
Royale, 9th Floor

Cross-Constituency Debrief – Officers Only

Generous support for the League's Midwinter Managers Meeting provided by:

*Boomerang Carnets | CIB - Opening Reception
Made Media – General Operating Support
Sametz Blackstone Associates - Opening Session
Schiedmayer Celesta GmbH - Monday Morning Networking Breakfast
Stages Consultants – General Operating Support*

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.*