

Midwinter Managers Meeting—Group 5-6 Agenda

All times below are Eastern. Agenda subject to change.

Constituent Liaison: Karen Yair, VP Research and Resources
kyair@americanorchestras.org

Meeting Location: The Westin New York at Times Square
270 W. 43rd Street, New York, NY 10036

Sunday, January 26, 2025

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

1:00pm-3:45pm **Group 5-6 Meetings**
Plymouth, 9th Floor

1:00pm-2:45pm **Welcome, Introductions and Round Robin**
Facilitator: Paul Jarrett, Executive Director, Akron Symphony.

2:45pm-3:00pm **Break**

3:00pm-3:45pm **Aligning Capacity to Commitment II.**
Facilitator: Elizabeth Brown-Ellis, Executive Director, Lima Symphony

How are we evolving our seasons to better align with community interests and market conditions, without overstretching our staff? How are we building board and MD alignment about the need for change? A peer discussion.

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: Location TBD**

Point person: Courtney Millbrook, Executive Director, Lansing
Symphony Orchestra

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 5-6 Meetings (cont.)**
Plymouth, 9th Floor

9:00am-10:00am **Building Musician Engagement**
Dr. Karen Yair, Vice President, Research and Resources, League of
American Orchestras
Kathryn Boucher, Executive Director, Spartanburg Philharmonic

How can we build a culture that our musicians feel part of? Join
a brief preview of medium budget orchestra findings from the
League's Inclusion Index project, followed by peer discussion.

10:00am-11:00am **Setting Up a Sabbatical**
Courtney Millbrook, Executive Director, Lansing Symphony Orchestra
Dr. Amanda Stringer, CEO, Tallahassee Symphony Orchestra
Heather Noonan, Vice President for Advocacy, League of American
Orchestras
Andrew Clark, Vice President, Finance and Administration, League of
American Orchestras

How do we advocate for and set up a sabbatical policy for our
organization? And as leaders, how can we make the most of the
opportunities a sabbatical brings?

11:00am-11:15am **Break**

11:15am-12:30pm **Making the Most of the OSR**
Dr Andrew Anzel, Director, Knowledge Center, League of American
Orchestras
Dr. Karen Yair, Vice President, Research and Resources, League of
American Orchestras

The OSR (Orchestra Statistical Report) offers a wealth of
information to inform strategic decision-making, financial
planning, and board reporting. During this presentation, we'll
explore the data available and how to put it to good use in
service of your own orchestra's goals.

12:30pm-1:30pm Lunch on your own

1:30pm-3:00pm **Financial Planning**

C. Lorenzo Evans III, MBA, Principal, CLE Business Services

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.

3:15pm-4:00pm

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

[\(https://www.bakerlaw.com/professionals/alexander-l-reid/\)](https://www.bakerlaw.com/professionals/alexander-l-reid/)

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.*

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