

## Midwinter Managers Meeting Agenda—Groups 7-8 Agenda

All times below are Eastern. Agenda subject to change.

**Constituent Liaison:** Najean Lee, Director of Government Affairs  
[nlee@americanorchestras.org](mailto:nlee@americanorchestras.org), 202-776-0214

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

### Sunday, January 26, 2025

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

**12:00pm-2:00pm**                      **Coffee Service (by Registration)**  
New York Atrium, 9th Floor

**1:00pm-3:30pm**                      **Group 7-8 Meetings**  
New Amsterdam, 9th Floor

**1:00pm-1:45pm**                      **Groups 7/8 ED Introductions and Round Robin sharing**

**1:45pm-2:25pm**                      **Financial Planning**  
Libby Watson, Executive Director, Adrian Symphony  
Orchestra

This session will highlight the importance of long-term financial planning, including building capital reserves and growing working capital, which can provide the necessary cushion for future growth, stabilize operations during lean periods, and offer the flexibility to take on new initiatives without overextending limited resources.

**2:25pm-2:30pm**                      **Break**

**2:30pm-3:30pm**                      **Strategic Prioritization: Maximizing Impact with Limited Resources**

Managers and Executive Directors of small budget orchestras have to juggle a wide variety of roles and responsibilities. Balancing the desire to serve all the constituents (musicians, patrons, donors, venue staff, board, etc.) with the practical realities of limited time,

staffing and funding to do it all can be overwhelming. Let's share effective strategies for prioritizing our work to ensure the organization's mission and core functions are sustained but without personnel burning out in the process, or giving into mission creep. Come prepared to share your best tips as well as questions.

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

*The Art of Influence: Leadership and Organizational Culture*  
Erika James, Dean of Wharton School, University of Pennsylvania.  
Keynote and Discussion with League President and CEO, Simon Woods

*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**  
Carmine's Italian Restaurant - Times Square  
200 W 44th St, New York, NY 10036

*RSVP to [nlee@americanorchestras.org](mailto:nlee@americanorchestras.org) no later than 01/23/25.*

**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-3:55pm**                      **Group 7-8 Meetings (cont.)**  
New Amsterdam, 9th Floor

**9:00am-9:20am**                      **Morning Recap and Setting Table for the Day**

**9:20am-10:00am**                      **Building Strategic Partnerships**  
Anna Meyer, Executive Director, Fayetteville Symphony Orchestra

Hear how Fayetteville Symphony has developed two strong relationships with key players in the community from the

ground-up. Anna will share about identifying, cultivating, and sustaining transformational strategic partnerships.

**10:00am-11:30am**    **Orchestrating Business Model Innovation**  
Albert Martinez, Strategy and Planning Manager, AILEY (Alvin Ailey Dance Foundation)

Reimagine your orchestra's approach to revenue, audience development, and mission-driven programming. This session will guide you through business model innovation to design revenue-generating programs that maximize your reach, strengthen community connections, and secure long-term sustainability.

**11:30am-11:35am**    **Break**

**11:35am-12:15pm**    **Beyond the Concert Hall**  
Trent Rash, Executive Director, The Missouri Symphony

This presentation will explore how The Missouri Symphony has been performing in spaces that seem to juxtapose the "idea" of where an orchestra should perform and what an orchestra is and how that has led to changing peoples' mindsets about their definition of a symphony orchestra and its relevance in today's world.

**12:15pm-1:30pm**    **Lunch on your own**

**1:30pm-3:30pm**    **Coffee Service (by Registration)**

**1:30pm-2:10pm**    **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/>)

**2:10pm-2:50pm**    **Invigorate and Unite Your Board**  
Rachel Perry, Executive Director, Auburn Symphony Orchestra

Learn how to self-lead an effective and invigorating board retreat to meld newer and more seasoned board members toward our common goals.

**2:50pm-2:55pm**    **Break**

**2:55pm-3:55pm**    **Open Group Discussion**

Revisit earlier topics or raise new ones. Possibilities include: musician recruitment, hiring/recruiting/retaining staff, exciting artistry, and more.

4:00pm-5:00pm  
Plymouth, 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.