

Midwinter Managers Meeting—Executive Directors, Groups 7-8 **Agenda**

All times below are Eastern. Agenda subject to change.

Constituent Liaison: Najean Lee, Director of Government Affairs & Education Advocacy
nlee@americanorchestras.org

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

Monday, January 26, 2026

12:00pm-6:00pm **Registration**
Broadway Foyer, 3rd Floor

12:30pm-3:30pm **Executive Directors, Groups 7-8 Constituency Meetings**
Ambassador I, 2nd Floor

12:30pm-1:30pm **Welcome, Introductions, Goals**
What is one current challenge you're wrestling with that you're hoping to connect with colleagues about?

1:30pm-2:30pm **Strategic Marketing Insights for Small Budget Executives**
Executive Directors of small-budget orchestras work under enormous pressure with limited resources. They don't need to be told what MORE they should do to market their institutions and try doing everything. Rather, they need insights and tools to help them focus and market more strategically with resources they have. EDs will receive specific, actionable insights and tools to develop, prioritize, and execute marketing operations that engender good will in the community and optimize earned and unearned revenue. No long stories; just facts, insights, and recommendations backed up by the latest industry research and 30 years of best practices.

Speaker: Robert Sweibel, Founder & President, Sweibel Arts

2:30pm-2:45pm **Break**

2:45pm-3:25pm **Fueling Creativity and Stability: ASO's New Music Society & Sound Support Fund**
How can small budget orchestras build sustainable annual support and donor excitement for special initiatives without overwhelming their

capacity or confusing their supporters? After taking a practical look at the balance between annual fund campaigns and special funds, participants will gain actionable tactics for structuring, communicating, and stewarding both types of fundraising efforts.

Speaker: Libby Watson, Adrian Symphony Orchestra

3:25pm

Preview Tuesday Discussion about Strategic Plan

3:30pm

Move to General Session

4:00pm-5:00pm

General Session

Broadway Ballroom, 3rd Floor

Navigating the Great Intergenerational Wealth Transfer with Laura MacDonald, Benefactor Group

Nearly \$124 trillion will transfer across generations by 2048—an unprecedented shift with profound implications for philanthropy. In this session, Laura will examine how donor behaviors evolve across generations and how orchestras can position themselves for long-term resilience. She will discuss ways to turn this research into adaptive approaches that deepen donor engagement and support lasting mission impact.

5:00pm-6:00pm

Welcome Reception

Broadway Foyer, 3rd Floor

Sponsored by Boomerang Carnets | CIB

7:00pm

Group Dinner: TBD. Contact nlee@americanorchestras.org to RSVP.

Tuesday, January 27, 2026

7:30am-11:00am

Registration

Broadway Foyer, 3rd Floor

8:00am-9:00am

Networking Breakfast

Broadway Foyer, 3rd Floor

Sponsored by Notation-AI

9:00am-4:00pm

Executive Directors, Groups 7-8 Constituency Meetings

Ambassador I, 2nd Floor

9:00am-9:20am

Reflections on Day 1 General Session

9:20am-10:00am

The Executive Director's Role in Helping Boards Uphold Artistic Excellence

A focused look at how Executive Directors strengthen board leadership around artistic planning, mission alignment, and

performance quality—turning governance into an active partner in artistic excellence

Speaker: Juan Gallastegui, Bremerton WestSound Symphony

10:00am-11:00am

Philanthropic and Giving Trends for Small Budget Orchestras

In the general session, we heard from Laura about major shifts in generational individual giving and its implications for orchestra. Laura will spend some time with 7-8 EDs to discuss how, even with limited staff capacity, they can best leverage changes in tax incentives for charitable giving and identify which opportunities and trends may be most impactful for smaller-budget nonprofits.

Speaker: Laura McDonald, Principal and Founder, Benefactor Group; Past Board Chair, Giving USA Foundation; Author, The Endowment Handbook

11:00am-11:10am

Break

11:10am-12:15pm

Culture as a Key

In this workshop, we'll discuss the meaning and value of culture, and the impact you can make by taking an intentional approach to setting, growing, and maintaining it throughout your organization. Julian Chender, a leader in organization development and consultant from [11A Collaborative](#), and Jessica Phillips, a musician and League Board Member who has been an outspoken voice for culture change in orchestras, will facilitate this session where you will learn practical takeaways in building organizational culture, discuss your unique culture challenges in small groups, and collectively share ideas on how and why it's necessary to create a dynamic and collaborative culture.

Speakers: Julian Chender and Jessica Phillips, 11A Collaborative

12:15pm-1:30pm

Lunch (on your own)

1:30pm-2:10pm

The Next 43 Years: How the LSO Executed a Turnaround and Return to Financial Sustainability

When stepping into leadership, one often inherits a mixed bag and sometimes the challenges can be intimidatingly steep to overcome. Ula Kauppi of the Lynchburg Symphony Orchestra will speak frankly about steering the LSO from several years of in-the-red finances to ending the 2025 fiscal year in-the-black. She will discuss the "out of the box" thinking and fresh ideas that helped to ignite public interest in the LSO and get donor dollars flowing again.

Speaker: Ula Kauppi, Lynchburg Symphony Orchestra

2:10pm-2:30pm

League Strategic Priorities 2026-2029: Feedback

Discussion and input on League's next set of strategic priorities.

- 2:30pm-3:30pm **Open Discussion/Parking Lot Topics**
During this hour, we'll pick up threads from prior topics that spur more discussion or raise new topics that have emerged from the last day and a half. Frequently discussed subjects include philanthropy, musician engagement, board relations, and more.
- 3:30pm-3:45pm **Wrap Up, Takeaways, Notes for Debrief**
- 3:45pm **Adjourn**
- 4:00pm-5:00pm Cross-Constituency Debrief** (Officers Only)
Broadway III, 3rd Floor

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

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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.*