

Midwinter Managers Meeting—Executive Directors, Group 5-6 **Agenda**

All times below are Eastern. Agenda subject to change.

Constituent Liaison: Karen Yair, VP, Research and Resources

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Monday, January 26, 2026

1:00pm-1:15pm **Welcome—Karen Yair**

1:15pm-2:15pm **Peer Discussion 1: The intersection between artistic programming, marketing, and sales—Paul Jarrett**

2:15pm-2:30pm **Break**

2:30pm-3:00pm **League Strategic Priorities 2026-2029: Feedback**
Simon Woods and Rachel Rossos Gallant

Your time to discuss and provide input on the League's next set of strategic priorities.

3:00pm-3:45pm **Continued discussion of League Strategic Priorities**
Paul Jarrett and Karen Yair

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

4:00pm-5:00pm **General Session**

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 **Close**

Tuesday, January 27, 2026

10:00am	Zoom room opens
10:10am	Welcome
10:15am-10:45am	Current Policy Issues —Heather Noonan <i>Heather will join us to answer your questions on tax reform, NEA funding and more, as well as to share practical tactics for deepening critical relationships with your local representatives.</i>
10:45am-11:00am	Break
11:00am-12:00pm	Peer Discussion 2: Market saturation and programming sustainability Courtney Millbrook
12:00pm-1:00pm	Break
1:00pm-2:00pm	Philanthropic Giving Trends for Medium-Budget Orchestras Laura McDonald <i>In yesterday's General Session, we heard from Laura about major shifts in generational individual giving and their implications for orchestras. This afternoon, Laura will spend some time with us discussing how medium-budget orchestras are most affected by current trends, and how we can best leverage changes in tax incentives for charitable giving within our communities. Bring your questions!</i> <i>Facilitated by Mario Lopez</i>
2:00pm-2:15pm	Break
2:15pm -3:15pm	Peer Discussion 3: Organizational culture, including musician inclusion and engagement —Kathryn Boucher
3:15pm-3:30pm	Break
3:30pm	Peer Discussion 4: Fundraising events (galas and beyond) —Kelly Swindell
4:30pm	Reflections and Topics for Future Peer Calls —Mario Lopez
4:45pm	Close

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.*