

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
kyair@americanorchestras.org

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

Monday, January 26, 2026

11:30am-6:00pm	Registration and Visit Business Partners Broadway Foyer, 3rd Floor
12:30pm-3:30pm	Executive Directors, Group 5-6 Constituency Meetings Ambassador II, 2nd Floor
12:30pm	Welcome and Housekeeping Notices —Karen Yair
12:35pm	Introductions and Round Table —Paul Jarrett
2:15pm	Break
2:30pm	League Strategic Priorities 2026-2029: Feedback —Simon Woods <i>Your time to discuss and provide input on the League's next set of strategic priorities.</i>
3:00pm	Continued Discussion of Strategic Priorities —Paul Jarrett and Karen Yair
3:50pm	Close for the day and dinner plan reminder —Courtney Millbrook
4:00pm-5:00pm	General Session Broadway Ballroom II and III, 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.

5:00-6:00pm	Welcome Reception Ambassador III, 2nd Floor Sponsored by Boomerang Carnets CIB
7:00pm	Group dinner: OBAO , 647 9th Ave, New York (Courtney Millbrook) Join your colleagues for a group dinner at OBAO (Thai/Vietnamese). Dinner will be served family style with a variety of appetizers, entrees, and dessert. Dietary needs can be accommodated. Cost will be around \$55 per person; you are welcome to bring a guest.

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, Group 5-6 Constituency Meetings Ambassador III, 2nd Floor
9:00 am	Peer Discussion —Kathryn Boucher <i>In today's peer discussions, we'll collectively address 3 critical issues identified through a pre-event survey.</i>
10:15am	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	Break
11:00am	Peer Discussion 2 —Kelly Swindell
12:30pm	Lunch
1:30pm	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>

2:30pm	Break
2:45pm	Peer Discussion 3 —Elizabeth Brown-Ellis
3:45pm	Reflections and Topics for Future Peer Calls; Close —Mario Lopez
4:00pm-5:00pm	Cross-Constituency Debrief (Officers Only) Broadway I, 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*.