

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

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

In today's peer discussions, we'll collectively address 3 critical issues identified through a pre-event survey.

10:15am

Current Policy Issues—Heather Noonan

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.

10:45am

Break

11:00am

Peer Discussion 2—Kelly Swindell

12:30pm

Lunch

1:30pm

Philanthropic Giving Trends for Medium-Budget Orchestras

Laura McDonald

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!

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.*