

A New Board Member's Guide to the Landscape of American Orchestras

October 6, 2026

League
of American Orchestras

League Contact



Director of Learning and Leadership Programs, League of American Orchestras

- Senior Governance Consultant and Certified Trainer, BoardSource
- Director of Consulting and Board Governance Services, Center for Volunteer and Nonprofit Leadership

dstyers@americanorchestras.org

646 822 4033

Housekeeping

- » This webinar will be recorded. The recording, transcript, and slides will be made available by the end of the week.
- » Please ask questions in the Q & A as we go along. The presentation will last approximately 45 minutes, with questions for a further 15 minutes at the end.
- » Additional useful information is available on our website under the “Related Resources” tab here:



Access Benefits from the League

- » Your orchestra's membership in the League provides you free access to a wealth of governance resources and orchestra field research at www.americanorchestras.org
- » Some of our member-only website resources require you create your own personal account. Email member@americanorchestras.org if you have trouble creating your personal account.
- » If you don't already receive our latest articles and news emails, please sign up for *Symphony* at: www.symphony.org

League of American Orchestras:
Championing the vitality of music and the orchestral experience,
supporting the orchestra community, and leading change boldly.

Benefits of League Membership for Orchestra Board Members

Your orchestra is part of a vibrant community of 1,600 organizations and individuals across North America that belong to the League of American Orchestras—the only national organization dedicated to orchestras and their communities. Our diverse membership includes world-renowned orchestras, community groups, summer festivals, student and youth ensembles, conservatories and libraries, businesses serving orchestras, and individuals who love symphonic music. We thank you for being one of the nearly 9,000 orchestra board members across the country.

Founded in 1942 and chartered by Congress in 1962, the League helps orchestras acknowledge and address the most critical issues head on: leading in times of rapid and profound change, responding to changing audience patterns and tastes, understanding and adapting business models and practices, and deepening relationships with communities. Led by President and CEO Simon Woods with a 26-person staff headquartered in New York City, the League is a \$6.5-million organization funded about 30% by membership dues, including dues your orchestra pays, and 70% by fundraising and earned revenue. The League is grateful to orchestra board members for their service to their orchestra and for their major giving support to the League, and we always insist that their home orchestra remain their top priority.

The work of the League is both broad and deep:

Vision: A thriving future for orchestras and their communities that celebrates creativity, artistry, and inclusion.

Mission: To champion the vitality of music and the orchestral experience, support the orchestra community, and lead change boldly.

Find answers to questions and guidance on almost any aspect of orchestra governance and management on our website, americanorchestras.org, or by contacting:

David Styers, Board Member Liaison | dstyers@americanorchestras.org | 646 822 4033
Erica Green, Director of Development | egreen@americanorchestras.org | 646 822 4060
Simon Woods, President and CEO | swoods@americanorchestras.org | 646 822 4046



Benefits for orchestra
board members

Hosts



Doug Hagerman

Immediate Past Chair, League of American Orchestras

- Past Chair, Milwaukee Symphony Orchestra
- Retired Senior Vice President and General Counsel, Rockwell Automation, Inc.



Simon Woods

President and CEO, League of American Orchestras.

- Chief Executive, Los Angeles Philharmonic
- President and CEO, Seattle Symphony
- President and CEO, New Jersey Symphony Orchestra
- Chief Executive, Royal Scottish National Orchestra
- Vice President of Artistic Planning and Operations, The Philadelphia Orchestra
- Recording Producer: EMI Classics, London

Agenda

1. Introduction to the Orchestra Field
2. Governance of Orchestras
3. Issues and Trends
4. League Programs and Resources
5. Q & A

Simon Woods

Doug Hagerman

Simon Woods

Simon Woods

Doug Hagerman

1. Introduction to the Orchestra Field

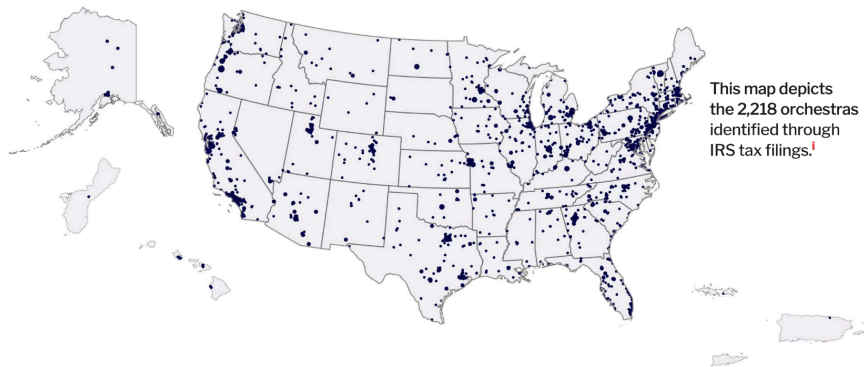
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Orchestras at a Glance

A vital part of America's cultural landscape

In concert halls across the country, American audiences are inspired and engaged by orchestras of all kinds, each ensemble as unique as its community. They are professional, community, and youth organizations—in cities, rural areas, and everything in between. Extraordinary musicians connect with their communities on and off the stage, bringing people together to share live music-making.

Orchestras, large and small, strengthen their communities



This map depicts the 2,218 orchestras identified through IRS tax filings.¹



Orchestras at a Glance

- **2,200 orchestras** make music in all **50 states**.¹
- League member orchestras are in **more than 300 of the 435 voting Congressional districts**—and are represented by **all U.S. Senators** (as of October 2025).
- Annual budgets for orchestras range from less than **\$30,000 to more than \$100 million**.¹
- **77%** of all orchestras have budgets under **\$300,000**.¹
- Together, orchestras presented **30,000** performances over the 2024–2025 season, **40%** of which were free.¹
- All told, **22.5** million people attended orchestral concerts over the 2024–2025 season.

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Orchestras are...

...in all 50 states

...in cities, suburbs, and rural areas

...professional, volunteer and a combination

...salaried, per service, and unpaid

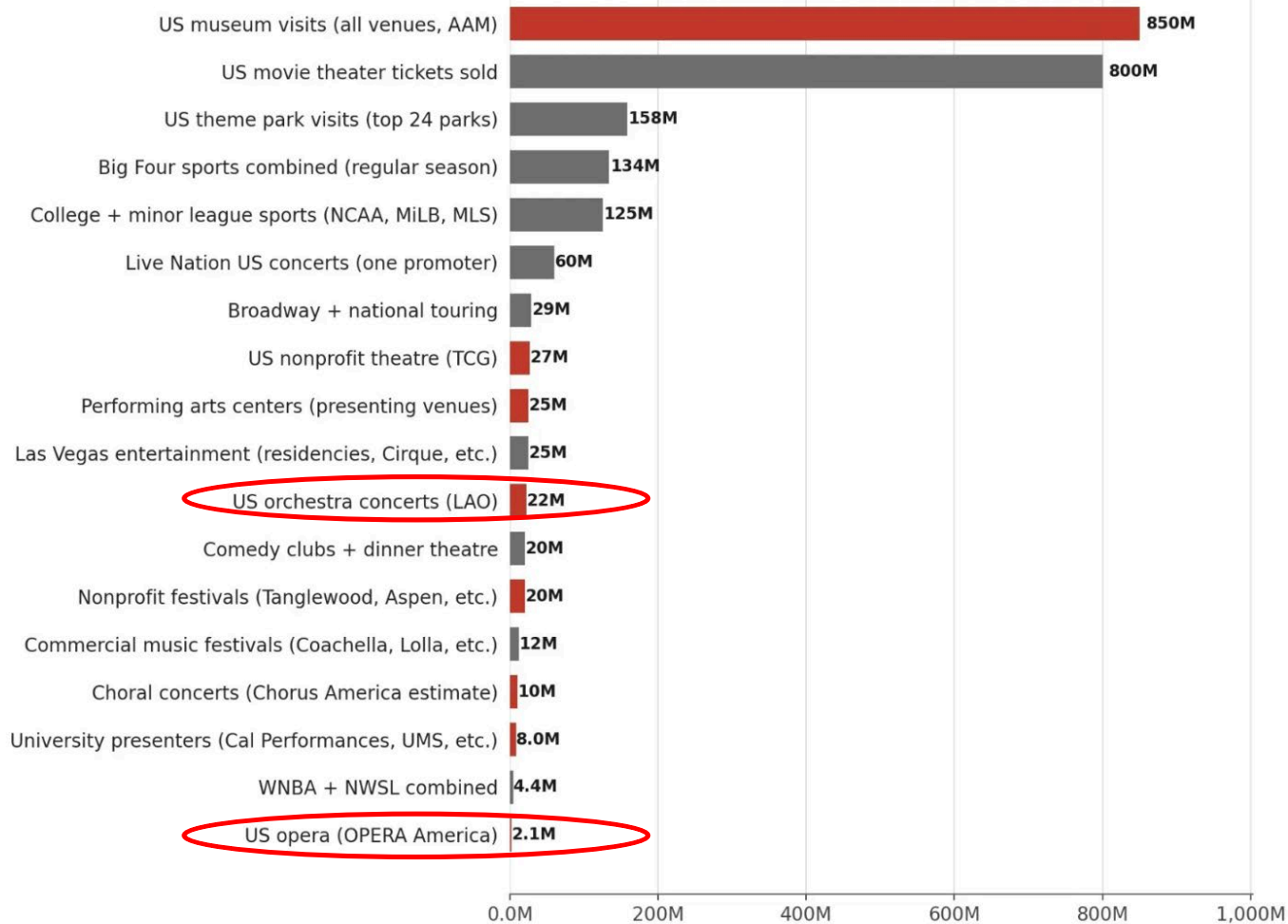
...unionized and non-unionized

...world famous, community based, and everything in between

...play four concerts a week or four concerts a year

...adult and youth

...highly capitalized or working week-to-week



Sources: AAM, MPA, TEA Theme Index 2024, MLB/NFL/NBA/NHL league reports, NCAA, MiLB, MLS, Live Nation 2024 10-K, LVCVA, IAVM (PACs), TCG Theatre Facts 2023, League of American Orchestras, OPERA America, NEA SPPA. Excludes digital engagement (streaming, TV, gaming, podcasts).

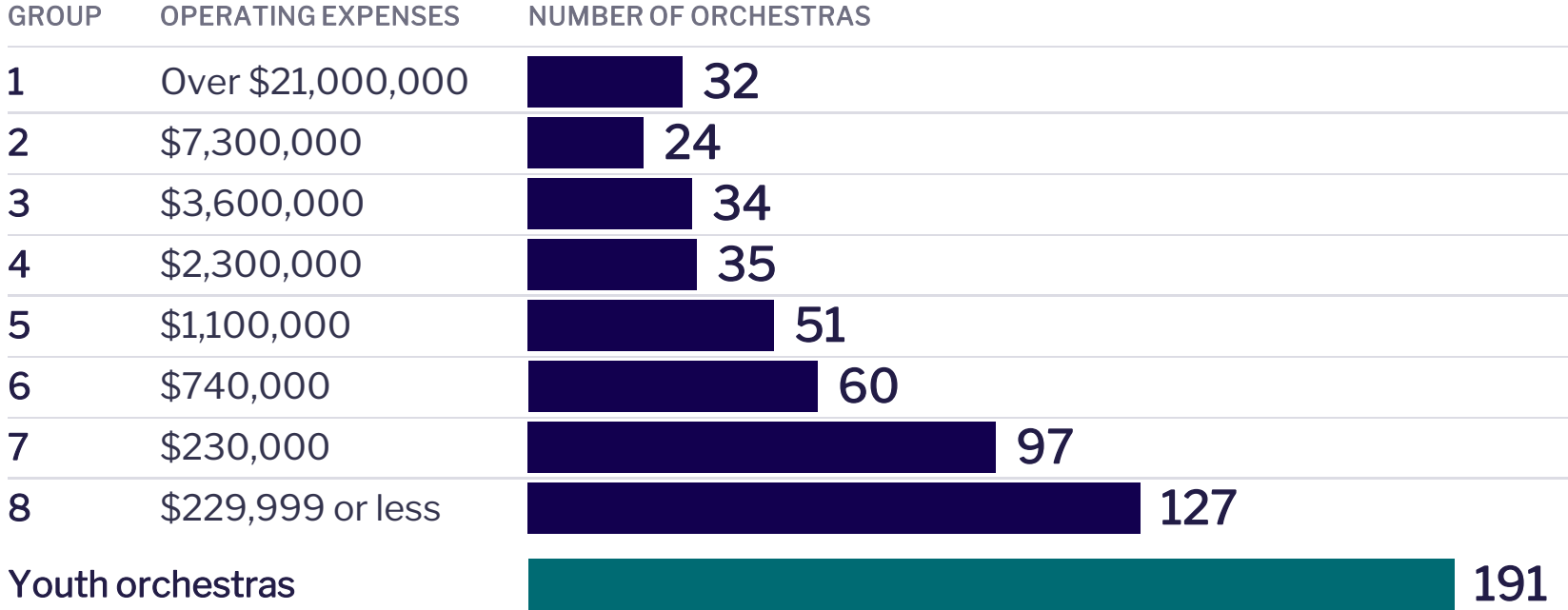
Diacritical / ArtsJournal

League Members



460 adult orchestras
191 youth orchestras
71 international orchestras
13 collegiate
1,117 individuals
118 business partners
100 institutions
(as of June 30, 2026)

League Orchestra Groups



2. The Governance of Orchestras

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PUBLICATION

Effective Orchestra Governance: A Guide for Boards – free to members



Effective Orchestra Governance:

A Guide for Boards, Second Edition

NOTEBOOM GOVERNANCE CENTER,
LEAGUE OF AMERICAN ORCHESTRAS



[Effective Orchestra Governance](#)

Ten Unique Things About Orchestra Nonprofit Board Governance

1. Three-headed leadership model
2. Variations in reporting lines for the three leaders
3. Orchestra musician representatives on board and committees
4. Some unique committees – Community Engagement; Equity, Diversity and Inclusion; Artistic
5. Lack of clarity of board role in artistic matters
6. Difficult business model with widespread structural deficits, dependency on heroic philanthropy and (often) undercapitalization
7. Equity, Diversity, and Inclusion as an imperative for our field
8. Combatting perceived elitism/narrow value
9. Unique processes for selecting CEO and Music Director, influenced by Collective Bargaining Agreement (CBA) if have one
10. Need for constructive relationships with musicians: involve them in governance

Background

» Constituencies of an orchestra

- Musicians
- Staff
- Board
- Volunteers
- Donors
- Audience
- Community
- Students

» Sources of governance authority: state statutes and by-laws

Orchestra Leadership Model

- » CEO reports to the Board Chair
- » Music Director (MD) sometimes reports to Board Chair, sometimes to CEO
- » Board Chair doesn't have sole power to hire and fire CEO or MD
- » Musicians and others almost always involved in CEO selection and MD selection
- » CEO and MD share leadership and must adopt a collaborative relationship
- » Job Descriptions: CEO and MD — evolving roles
- » Strong relationship between CEO and Board Chair is essential: Thought partners
- » Board should represent the community and take an external vantage point

What Does a Board Do?

- » Act as representatives of the public to maintain organization's integrity and mission
- » Translate community investment into public value and impact

	Board	Staff
ROLE	Oversight: set metrics and accountability	Management: plan, organize, execute, direct
POLICY	Make policies	Implement policies
STRATEGY	Provide input to and approve strategy	Plan and budget to execute strategy
RESULTS	Evaluate and give feedback	Report progress and outcomes
PARTNERSHIP	Collaborate with CEO, ask hard questions	Collaborate with board, keep them informed

Boards: Individual vs Collective

	Individual (as a member)	Collective (as a group)
MISSION	Understand and support the mission	Shape values, vision, and mission
STRATEGY	Advise in your area of expertise	Set direction and approve plans
LEADERSHIP	Respect and assist the chief executive	Select, evaluate, and support the CEO
FINANCES	Review and understand statements & budgets	Protect assets, oversee finances
FUNDRAISING	Give a significant gift, ask others	Ensure resources are adequate for mission
PROGRAMS	Attend performances, follow the field	Monitor performance and impact
BOARD	Prepare, engage, mentor new members	Build and sustain a competent board
STANDING	Lend your name, credibility, network	Ensure integrity and public standing

Source: Jan Masaoka, [*"The CompassPoint Board Model for Governance and Support,"*](#)

Governance as Leadership

Type I **Fiduciary** (oversight)

- Faithful to mission
- Accountable for performance
- Compliant with law and regulation



Type II **Strategic** (foresight)

- Setting course
- Setting priorities
- Aligning resources

Type III **Generative** (insight)

- Identify preferred future
- Select which problems to solve
- Determine what is important

Considerations in Building a Board

- » Cultivation and recruitment of candidates
 - Where do we look?
 - Diversity of all types
 - What we are looking for: passion for the mission / love of the music; familiarity with non-profit governance; belief in community engagement and other values; willingness to advocate for the orchestra and participate in fundraising
- » Nomination by Governance Committee
 - Set explicit expectations with candidates
- » Election by the board –become “directors” under state law and by-laws
- » Terms
- » Onboarding
- » Making resources available – online collaboration tools

Field Demographic Snapshot

Programming

- » Dramatic increase in performances of **music by women and composers of color**. In 2023-24, women and composers of color accounted for **23%** of U.S. orchestras' programming, up from just **5%** in the 2015-16 season
- » Proportion of works by **living composers grew from 12%** in 2015-16 to **23%** in 2023-24
- » Occurred across **all orchestra budget groups and all regions**

Staff and Board

- » **Staff members** are the most diverse areas of orchestras, but not in top positions
- » **Executive Directors** are roughly 50/50 men to women, but men dominate in larger budget orchestras
- » **Board diversity** has improved significantly in last decade, and 1 in 6 now identify as people of color
- » But **boards** are still less racially diverse than nonprofit organizations in general, and women are still under-represented

Artists

- » Significant increases in **women conductors** and **conductors of color** in last decade
- » But most **music directors** are still white, and only 1 in 9 music directors are women
- » Approximate gender parity among **musicians**, but again men dominate in larger budget orchestras
- » Increase in Asian and Asian-American **musicians**, but Black and Latino representation has barely moved in last 20 years

Equity, Diversity, and Inclusion

Why does equity, diversity, and inclusion matter to orchestras?

- » Enriching to the musical performances that are at the heart of the orchestral experience
- » Essential to the long-term sustainability of orchestras in the context of the changing demographics of the country
- » Vital in attracting and retaining talent
- » Central to a culture of innovation and collaboration
- » Imperative for authentic relationships with communities

3. The Orchestra Field Today: Data and Themes

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Key Revenue Trends since 2022-23

Subscriptions and Memberships

FEBRUARY–JANUARY

+4.8%

subscription revenue over three years to 2024-25, after inflation

No change

the one dip, in 2023-24, was recovered by the following campaign

Broadly level: the steadiest of the three

- Subscription ticket sales rose **4%**.
- Subscriber numbers rose **2%**.

Single Tickets

JULY–JUNE

+11%

single-ticket revenue since 2022-23, after inflation

–8%

revenue in 2025-26, the first fall in the three years

Rose strongly, then lost part of the gain

- By 2024-25, revenue reached **20% above 2022-23** on 9% more tickets.
- In 2025-26, ticket sales fell **3%** and the average price paid per ticket fell **5%**.

Individual Giving

JULY–JUNE

+11%

donors and gifts since 2022-23, rising in every season

–6%

gift revenue in 2025-26, after inflation

A broadening donor base that is not sustaining revenue

- Average gift size **declined 10%**.
- Gifts per donor **held at 1.1** in every season, so donors and gifts moved in parallel.

Change since 2022-23 unless stated; revenue, average price paid, and average gift size are inflation-adjusted. Sources: TRG Arts and Culture Benchmark Data Update, 2022-23 to 2024-25, and TRG Arts and Culture Benchmark, US Orchestras 2025-26 Season Review, September 2026 (38 US orchestras). Subscriptions are counted when sold, so the campaign year runs February to January. Some 2025-26 figures are League calculations from published totals.

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Finances

High-level financial performance indicators from FY25 Orchestra Statistical Report (161 Orchestras):

+8.9%	Average Change in Net Assets
4.5%	Average Endowment Draw
+9.7%	Average Return on Investments
21	Average Weeks Expense in Liquidity
31%	Subscription Sales: Average % of Performance Revenue
53%	Single/Group Ticket Sales: Average % of Performance Revenue
16%	Tour/Other Ticket Sales: Average % of Performance Revenue
\$0.12	Average Cost of Fundraising per Dollar Raised (including staff)
\$0.46	Average Cost of Sale per Dollar of Tickets Purchased (including staff)
\$41	Average Performance Revenue Per Attendee

NEW! AI-based Orchestra Statistical Report coming in early 2027

Orchestras in 2026: Assets

- » Art form continues to speak deeply to millions of people
- » Artistic standards have never been higher
- » Orchestras are centering local identity and service to communities
- » Long tradition of resilience, learning, collaboration in the field
- » Creativity on- and off-stage
- » Programming evolving in new ways
- » Real progress and momentum in inclusion – despite national climate
- » Orchestras currently somewhat healthier than opera, dance, and theater

Orchestras in 2026: Challenges

Audience

- » Decline of older audience
- » Audience tastes/preaudienceferences diverging and hard to discern
- » Difficulty in recruiting and retaining next generation audiences
- » Difficulty in diversifying audience

Fundraising

- » Aging out of donors / generational transfer of wealth
- » Competition for giving as government funding withdrawn from other sectors
- » Foundations re-prioritizing
- » Corporates harder than ever
- » Decline/loss of government funding

External

- » Complex federal legislative environment
- » Negative perceptions of EDI and social justice
- » Political polarization
- » Geo-political turmoil and economic uncertainty
- » Climate change and natural disasters
- » Artificial intelligence

Organizational

- » Stress on orchestra business models – the greater the scale the greater the problem
- » Urgent need to build public value and articulate it
- » Inflexible operational cultures
- » Internal stakeholder misalignment and differing visions of success
- » Staff burnout

4. League Programs and Resources

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About the League

- » The American Symphony Orchestra League was founded in 1942, with the first national conference occurring that same year.
- » Later relocated from Washington D.C. to New York, and rebranded as League of American Orchestras
- » 26 full time staff, plus writers, researchers, consultants, facilitators, etc
- » HQ is in New York, but organization is largely virtual with staff in New York, Boston, Rochester, Detroit, Chicago, Grand Rapids, Milwaukee, Austin, Houston, Washington DC
- » ~\$7M annual budget. Income roughly divides in three: membership dues, earned revenue, fundraised

Vision and Mission

Mission

To champion the vitality of music and the orchestral experience, support the orchestra community, and lead change boldly

Vision

A thriving future for orchestras and their communities that celebrates creativity, artistry, and inclusion

League Board

- » National board – all major regions of country represented
- » 61 directors
- » Largest sub-group within League board is board members of orchestras
- » Others from across music business, including musicians, conductors, soloists, staff, composers, educators
- » Field representation: ex-officio members represent CEO Groups 1, 2, 3/4, 5/6, 7/8, Youth Orchestras, and Volunteer Council

Major Programs

In Person

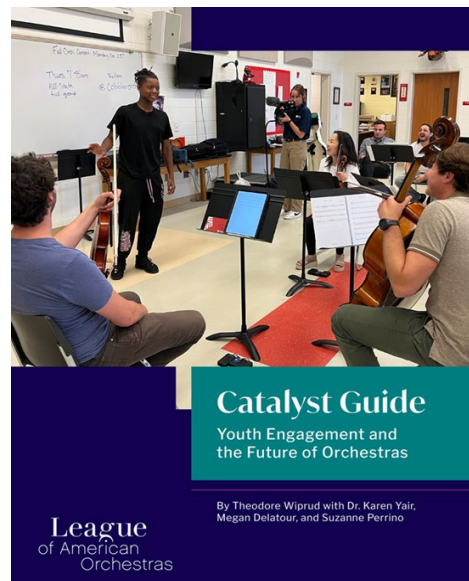
- » National Conference
- » Midwinter Managers Meeting
- » Seminars/Webinars
- » Essentials of Orchestra Management
- » Orchestra Intensives: Personnel / Artistic
- » Toulmin Composers Program
- » Anne Parsons Leadership Program
- » Inclusive Stages



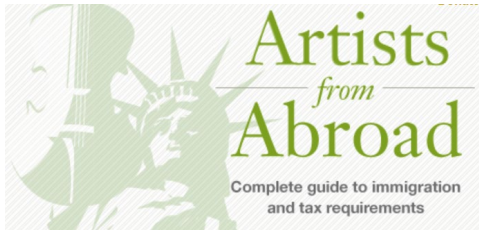
Major Programs

Publications

- » Knowledge Center
- » Noteboom Governance Center
- » Equity, Diversity, and Inclusion Resource Center
- » Finance Resource Center
- » Orchestra Statistical Report – *New AI version coming 2027*
- » Demographic Report
- » Salary & Benefits Survey
- » Research Reports
- » Catalyst Guides

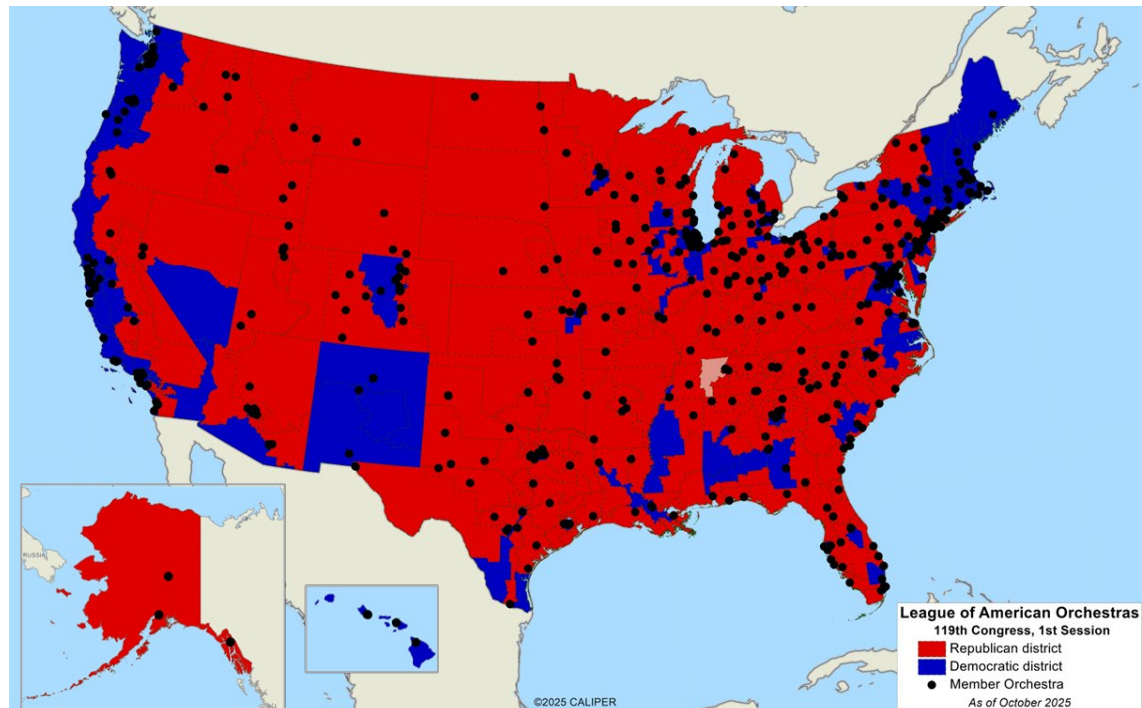


Advocacy



- » **League plays leadership role in arts advocacy**
- » **Advocacy:** White House, Administration, Congress, and Nonprofit Sector
- » **Assistance to orchestras:** Executive Order compliance, Visa Support and www.artistsfromabroad.org, Travel with Musical Instruments, and Charitable Giving Trends
- » **Supporting orchestras' advocacy in their communities:** Music Education Advocacy Tools, Public Value Toolkit, *Playing Your Part* Guide

Member Orchestras by Congressional District – 119th Congress (2025)



The League represents orchestras in 304 out of 435 Congressional districts, plus D.C., and in every state.

Together, we reach 100% of the Senate and 70% of the U.S. House of Representatives!

And with our members evenly represented by both parties, continued bipartisan support for issues that impact orchestras remains critical.
(As of October 2025)

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Strategic Framework FY27-FY30



Orchestras Building Community Through Education and Engagement

Learn how orchestras across the country are driving change by engaging, teaching, and learning from their local communities.

READ THE REPORT



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5. Q&A

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