

Seminar for New Executive Directors

Tuesday, May 26, 2015 from 1:00pm to 6:00pm
Wednesday, May 27, 2015 from 8:00am to 12:30pm

Room 12
Cleveland Convention Center
1 St. Clair Avenue, NE
Cleveland, OH

You're a new executive director, in your first couple of years on the job. Not only are you navigating your way as the new CEO, but you are asked to be proficient in virtually every area of management, from fundraising and finance to board governance and human resources—and everything in between. This seminar offers an executive-level overview of the fundamentals of orchestra management to give new executive directors the skills to be effective leaders. Participants will explore how orchestras are structured and how they function, as well as what is unique to their culture. You will also be introduced to a number of best practices for working with your board, staff, music director, musicians, donors and community stakeholders. Attendees will have the opportunity to share ideas and best practices; create practical take home action plans; and strengthen your collegial network.

Seminar topics will include:

- *Leadership and Management* – Balancing and understanding the leadership and management needs of an orchestra.
- *Fundraising* – Raising money is becoming an increasingly large part of an executive's job. You will learn some very concrete best practices in growing your individual and institutional base.
- *Boards & Governance* – Learn how to manage and strengthen your relationship with the board.
- *Finance* – Learn the basics of accounting and finance in easy-to-understand layman's terms to increase your skills and confidence in this critical area.
- *Marketing* – Learn about the relationship between programming and marketing; how to make good marketing choices on tight budgets; and the evolving role of social media.

Who should attend?

- This seminar is for new executives with less than three years of experience;
- Or it can be geared for those whom an ED's position is the next step on their career ladder.

Seminar Director: Melia Tourangeau, president & CEO, Utah Symphony/Utah Opera

Additional Faculty: Ross Binnie, chief marketing officer, The Cleveland Orchestra; Dennis LaBarre, board chair, The Cleveland Orchestra; James Menger, chief financial officer, The Cleveland Orchestra; Faith Noble, controller, The Cleveland

Board
Governance

League of American Orchestras

Orchestra; Stacy Wilson Margolis, vice president for development, League of American Orchestras

Tuesday, May 26, 2015

1:00-2:30pm

A Framework for Leadership

Melia Tourangeau

- Introductions
 - As you introduce yourself, name someone who you admire as a great leader. It can be someone famous, a family member, someone in your community, etc. What characteristics make them great?
- What is your biggest leadership challenge?
- What are you hoping to gain from this course to help you with this challenge?

2:30-2:45pm

Break

2:45-4:45pm

Development Overview

Stacy Wilson Margolis

- **Building Confidence and a Culture of Philanthropy:** What does this mean, why is this important, and what is the CEO's role in encouraging this culture throughout the organization? How do other external affairs functions fit it?
- **Relationship building:** Relationships are the most important part of fundraising. We'll dive into what is needed for successful relationships with the chief development officer, board chair and board members, volunteers, and donors themselves.
- **The Patron Model:** How does this successful model work in both small and large organizations, and what is the CEO's role?
- **Priorities:** The work of fundraising is never done. How does the CEO make the best use of his/her time in this area?

4:45-5:00pm

Break

5:00-6:00pm

Governance Session

Dennis LaBarre

- Attracting good board leadership
- The CEO/Board Chair relationship
- The role of the board vs. the role of the management

Wednesday, May 27, 2015

8:00-8:30am

Check-in on Learning from Day One

Melia Tourangeau

8:30-10:00am

Finance Session

Jim Menger, Faith Noble

- Finance 101
- Understanding the Balance Sheet
- Donor Intent: Restricted vs. Unrestricted Gifts and How to Account for Them

10:00-10:15am

Break

10:15-11:30am

Marketing

Ross Binnie

- The role of the CEO in programming and marketing
- Cost effective marketing practices; social media
- Making marketing choices

11:15am-12:30pm

Reflections on the Learning and Q&A

Melia Tourangeau

- Leadership Lessons
- Defining your leadership style, personal values, and organizational priorities
- Continuing the conversation

12:30pm

Adjourn

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