



Southwest  
Florida  
Symphony

WORLD CLASS MUSIC IN PARADISE<sup>SM</sup>

Annual Board Report 2019-20



uncharted  
**TERRITORY**

**58**  
SEASON



**Annual Meeting  
October 20, 2020  
5:00-6:00**

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**Annual Meeting**  
**October 20, 2020**  
**5:00-6:00**  
**Virtual Meeting via Zoom**

**Agenda**

Welcome and Call to Order	Tom Uhler
Approval of 2019 Annual Meeting Minutes	Tom Uhler
Financial Report	Dylan Zsebe
Endowment Foundation Report	David Hall
Executive Director's Report	Amy Ginsburg
New Staff Introductions	Amy Ginsburg
Board Chair's Report	Tom Uhler
Adjournment	Tom Uhler



**The mission of the Southwest  
Florida Symphony Orchestra  
is to present outstanding music for  
the entertainment, enrichment and  
education of the broadest  
possible public.**

## Southwest Florida Symphony Orchestra Annual Report 2019 – 2020

### Report of the Board Chair

These reports often with something like, “What a year it’s been!”, but I think this one takes the cake!

From Maestro Kabaretti impending retirement from his position as Artistic Director to the total shutdown of all artistic endeavors in March, this has been **the** year of change.

Instead of rolling right into our 60<sup>th</sup> season, we’re hedging our bets and calling whatever it is that happens our 59 ½, which makes pretty good sense!

Through successfully arranging a Payroll Protection Plan loan, which we expect to be forgiven, we were able to pay our musicians a significant portion of the income they lost through the cancellation of several performances. We also applied for and received an SBA loan to provide financial stability during an uncertain time. We dramatically reduced staff and, through the generosity of David Hall and Sanibel-Captiva Community Bank, moved our offices into rent-free space right up the street. Please join me in thanking this civic-minded bank for their strong and ongoing support.

Artistically, the season was a huge success. Our educational programs continue to thrive under Kara Griffith’s leadership. We broke into a new market, performing in Punta Gorda to a strong house, and our outreach to new audiences with Maestro Steve Hackman’s show exceeded expectations.

We began the arduous task of selecting a new Artistic Director, which process will go on hold till such time as we have a firm schedule of orchestral concerts.

Meanwhile, Amy and her staff are investigating performance venues, audience attitudes and other factors which will guide us in what programming we can schedule and when we should do it.

We are not just marking time; the staff and board continue to meet, discuss, and dream about where we go from here.

When we get through all this – and we will – we'll be back ready to put the world's greatest music on stage, with dedicated professional musicians, all with YOUR continued support.

Hang in there; this, too, will pass. And we will be better than ever!

Tom Uhler

## **ANNUAL MEETING MINUTES**

**OCTOBER 23, 2019 5:08pm**

### **The GATHER RESTAURANT, CAPE CORAL**

Present: President-Tom Uhler, Joseph Broughton, Liz Marnul, Secretary-Reina Schlager, Tom Kracmer, Dorothy Munsch, Gary Niethamer, Elle Clifford, Rob Diefenbach, and members of the public. Also present: Maestro Nir Kabaretti, Executive Director, Amy Ginsburg, Kara Griffith, Ann Satterly, Susan Anderson and recently added Keenan Riley.

Absent: Alan Evans, Nancy Gardella, Jovana Batkovic, Alex Bremner.

President Uhler called the meeting to order at 5:08pm.

Tom asked for approval of the Minutes of the Annual Meeting dated October 10, 2018. A correction to the minutes was cited to change Pam Simon to Pam Simpson. That change has been noted. Liz Marnul made the MOTION and Elle Clifford seconded. MOTION carried to accept the minutes as presented with the cited correction. Tom congratulated Symphony management for the informative and colorful 2018/2019 Annual Report of the Southwest Florida Symphony made available to all in attendance.

The 2018/19 Annual Report is attached to these minutes.

#### **FINANCE REPORT**

The Financial Report was provided in the Annual Report. Staff, Ann Satterly, brought the report section to the attention of those in attendance. She began employment with the Symphony in April and welcomes all who have questions to please call her at the Symphony office.

#### **REPORT OF THE ENDOWMENT**

Corey Vertich, in his capacity as Treasure of the Endowment Foundation provided summary comments in connection to the June 30, 2019 Financial Statements in the attached Annual Report. Corey reminded all those present that the purpose of the Endowment is to provide a stable income resource for our Symphony AND to increase our number of full-time musicians. Increasing the number of full-time musicians will increase the quality of our overall organization.

The Endowment's goal remains to be \$5,000,000, and emphasis was on increasing participation in the Legacy Society. There were two new members in the past year. Corey described the distribution of funds to the Symphony by the Endowment runs 4-5% annually, and this year there were two distributions: the regular annual distribution which was \$120,000 and a second \$120,000 to assist in balancing the budget. Pledge commitments from the Legacy Society exceed \$4 million.

Corey noted that in addition to these distributions, one-half of the Development Director's Salary is paid for by the Endowment (which is less than half of 1%) as that position, from past experience, has had a positive direct impact on the growth of the Endowment.

**continued**

## **Minutes of the Annual Meeting 2019**

**Page 2, continued.**

### **REPORT OF THE EXECUTIVE DIRECTOR**

Amy Ginsburg brought bittersweet humor to our event by running through a number of challenging moments throughout the 2018-19 Symphony Season. However, in looking back we could call it bittersweet humor because in each and every instance our staff, our musicians, our community was able to work to overcome the adversity and shine.

She also mentioned our expectation for an incredible upcoming season as Maestro Kabaretti ends his tenure with us. Plans are underway for our next great Maestro – Nir will be missed by all.

The Maestro stood and engaged with those in attendance and added that the position of Maestro, by nature, includes change after several years. He is looking forward to his future performances and expressed a place in his heart for his time spent in SWFlorida. He wished all a wonderful upcoming season for “Our Orchestra”.

Amy then introduced each member of the staff in attendance.

### **CLOSING COMMENTS BY THE BOARD CHAIR**

We are a \$1.8million/year cultural powerhouse and the support of our community and all those present are critical to its success. We have the right staffing. Tom introduced Gary Niethamer, our newest board member, who had served on the board many years ago. Tom thanked Gary and his wife for hosting the upcoming Holiday House preview event.

Tom also commented that many people do not realize that without full-time musicians, many of our dedicated musicians travel from afar for each performance. This highlights our need for a permanent orchestra and supporting all we can: our Endowment and our Symphony Society in personal involvement and financial support.

He invited all to attend the Stardust and Strings and the Holiday House November happenings and thanked the SW Florida Symphony Society for all that they do.

There being no other comments, Tom thanked all those present for attending.  
The meeting adjourned at 5:30pm.

Respectfully submitted, REINA SCHLAGER, Secretary



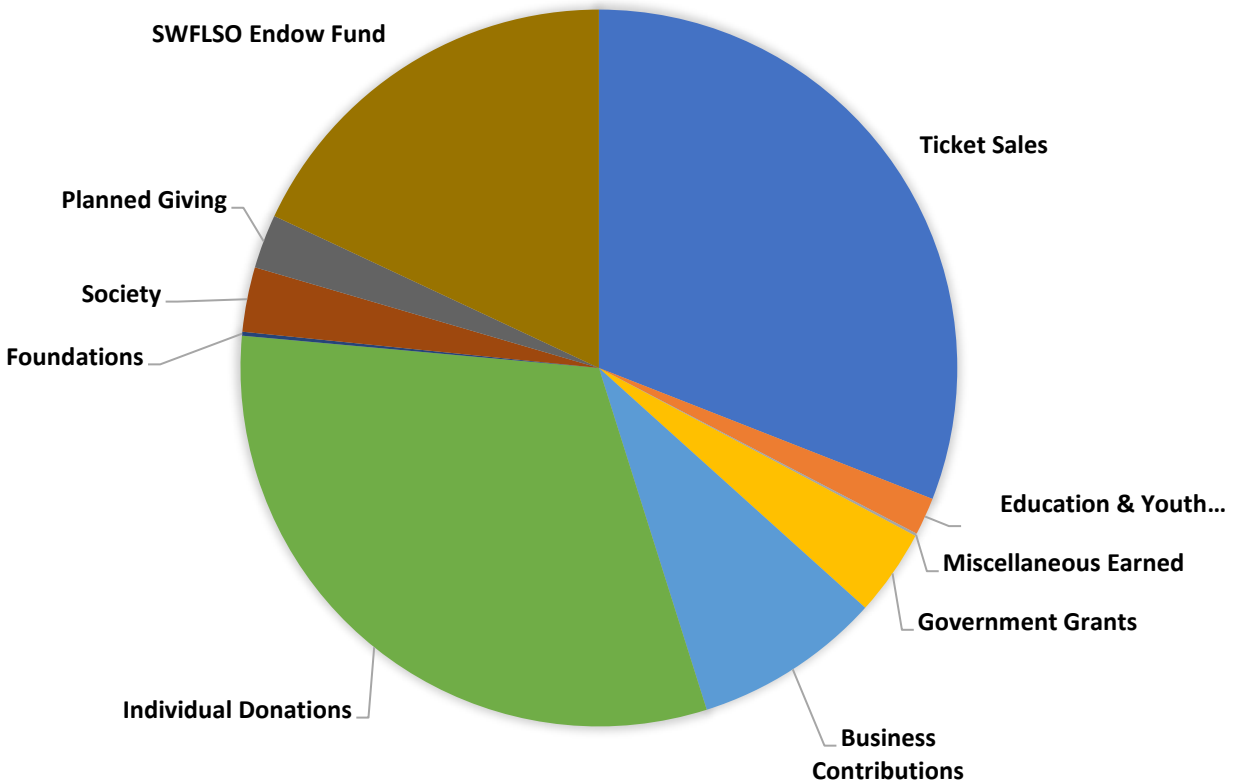
**Fiscal Y/E Financial Report**  
**Southwest Florida Symphony Orchestra and Chorus Association Inc**  
**Statement of Financial Position Summary**

	<b>Three Year Comparison</b>		
	<b>As of June 30, 2020</b>		
	<b>2020</b>	2019	2018
<b>Assets</b>			
Checking/Savings	<b>183,799</b>	48,513	150,703
Fixed Assets	<b>6,066</b>	12,302	14,851
Accounts Receivable	<b>7,610</b>	12,310	23,448
Other Assets	<b>36,029</b>	15,780	23,898
Community Foundation	<b>212,462</b>	212,462	368,656
Total Assets	<b>445,966</b>	301,367	581,556
<b>Liabilities &amp; Equity</b>			
<b>Liabilities</b>			
Accounts Payable	<b>19,091</b>	12,775	4,375
Current Liabilities	<b>184,659</b>	5,544	789
Deferred Program Revenue	<b>71,287</b>	186,887	239,666
Notes Payable	<b>159,900</b>	-	-
<b>Equity</b>			
	<b>11,029</b>	96,161	336,726
<b>Total Liabilities &amp; Equity</b>	<b>445,966</b>	301,367	581,556

## ACTUAL INCOME 2019-2020

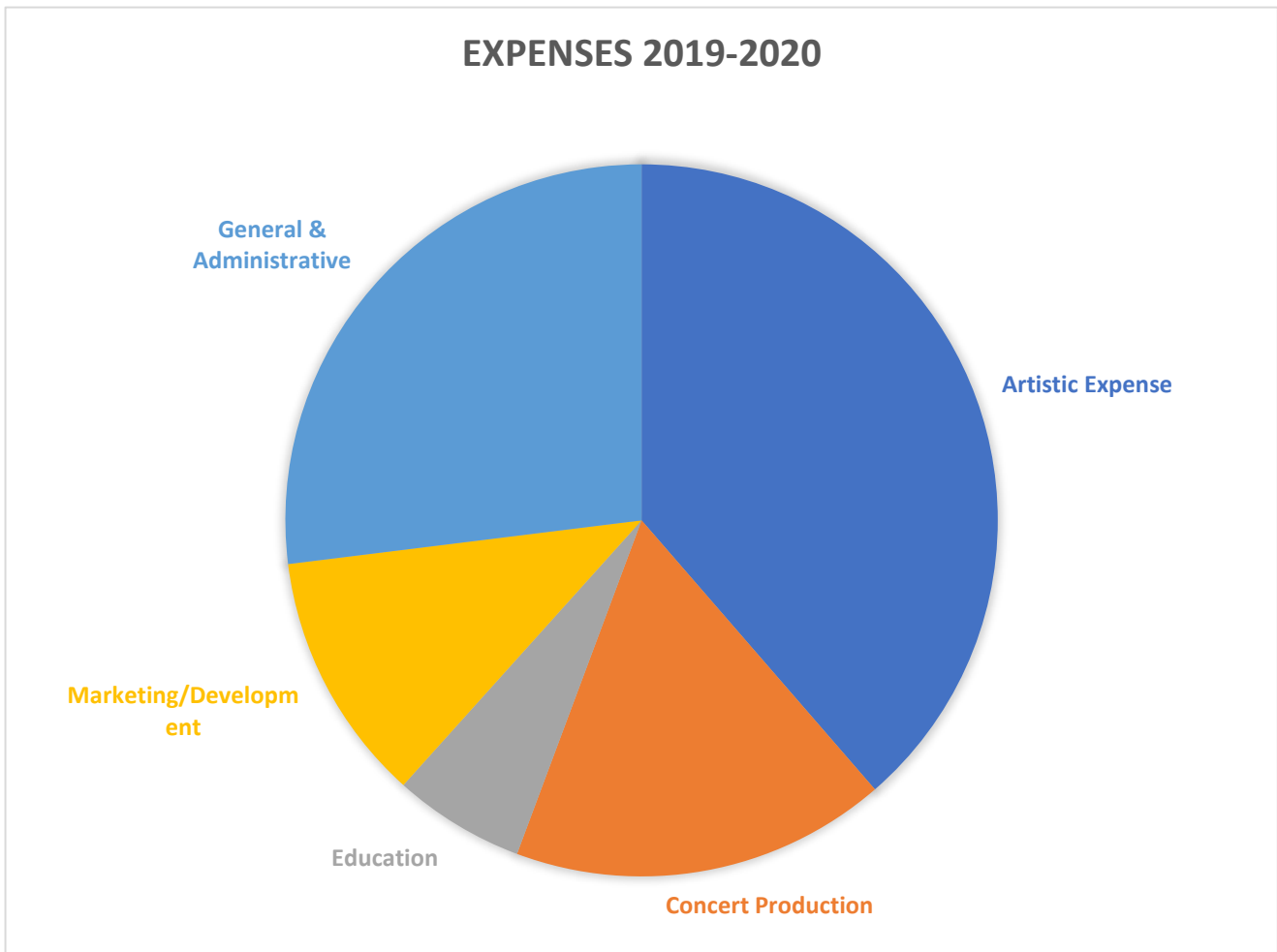
Ticket Sales	447,396	31%
Education & Youth Orchestra	24,496	2%
Miscellaneous Earned	1,646	0%
Government Grants	56,411	4%
Business Contributions	122,375	8%
Individual Donations	452,415	31%
Foundations	2,563	0%
Society	42,163	3%
Planned Giving	35,224	2%
SWFLSO Endow Fund	260,610	18%
<b>Total Income</b>	<b>1,445,299</b>	<b>100%</b>

### INCOME 2019-2020



# ACTUAL EXPENSES 2019-2020

Categories	Expense	
Artistic Expense	621,083	39%
Concert Production	274,245	17%
Education	95,985	6%
Marketing/Development	182,967	11%
General & Administrative	<u>433,451</u>	27%
<b>Total Expense</b>	<b><u>1,607,731</u></b>	<b>100%</b>





**Southwest Florida Symphony  
Endowment Foundation**  
7500 College Parkway, Suite 200  
Fort Myers, Florida 33907  
239-210-2345  
davidcarletonhall@embarqmail.com

**Annual Report  
June 30, 2020**

The Southwest Florida Symphony Endowment Foundation ended fiscal year 2020 with a market value of \$2,229,695, including \$2,056,844 in the General Fund (unrestricted) and \$172,851 in the Van Sickle Fund. The General Fund included \$23,396 for the John Hudson Fund.

During the fiscal year ended June 30, 2020, the Endowment Foundation shared the symphony's development director. The total estate commitments are approximately \$4 million to \$4.5 million.

During the year ended June 30, 2020, the Endowment Foundation had the following cash flow:

Total Assets as of June 30, 2019	\$2,443,624
Grants Paid to the Symphony	(245,000)
Grants Paid by the Van Sickle Fund	( 10,000)
Grant Paid by the Hudson Fund	( 1,000)
Operating Expenses (including \$9,100 for marketing reimbursement)	( 12,274)
Donations Received	15,100
Investment Results:	
Interest, Dividends	50,594
Realized Net Gains due to repositioning portfolio	29,284
Unrealized Net Decreases in Investment Values	<u>(40,633)</u> 39,245
Total Assets as of June 30, 2020	<u>\$2,229,695</u>

During July and August 2020, the investments increased \$162,501 in value and the Endowment Foundation received a donation for \$386,277 bringing total assets to \$2,811,656.

During the last fiscal year, the Endowment Foundation made a grant to the Symphony of \$115,000. The \$115,000 grant represented 4.71% of the general fund at the beginning of the year and was at the top end of the 4% to 5% range that the Endowment Foundation set as a target grant amount. As the last fiscal year progressed, the Symphony had a financial need and the Endowment's financial results were strong, so the Endowment Foundation granted an additional \$130,000 to the Symphony. During the current fiscal year ending June 30, 2020, the Endowment Foundation committed to granting \$107,000, or 4.80% of the general fund as of June 30, 2020. This will be paid when the Symphony requests the funds.

During the fiscal year ended June 30, 2020, the Van Sickle Fund made \$10,000 of grants to college students who are music majors. The Van Sickle Fund is currently supporting four college students with grants. We thank the Symphony Society for holding the vocal Competition and selecting the recipients.

The Endowment Foundation continues to be managed by volunteers. David Hall is President. Thomas Kracmer is Vice President. Scott Gregory is Secretary. Corey Vertich is Treasurer and Chairman of our Investment Committee. Also on the Board are Christina Boyhan (the Symphony's Treasurer), Katherine Caldwell, Cynthia Duff, Stephen Qua and Robert Diefenbach.

Because we are a volunteer organization, our operating expenses are minimal at less than half of 1% of assets. Expenses predominantly include: (1) the cost to prepare and file our tax return; (2) the cost of the music competitions to select the grant recipients; and (3) the reimbursement to the Symphony for shared marketing costs.

Endowment assets are currently invested in a widely diversified portfolio of both Exchanged Traded Funds (ETFs) and Open-End Mutual Funds. The portfolio is monitored quarterly and performance is measured against customized benchmarks.

If you would like to talk with someone about including the Endowment Foundation in your estate plans, or another long-term donation, please call David Hall at 239-910-3673.

## Executive Director's Message

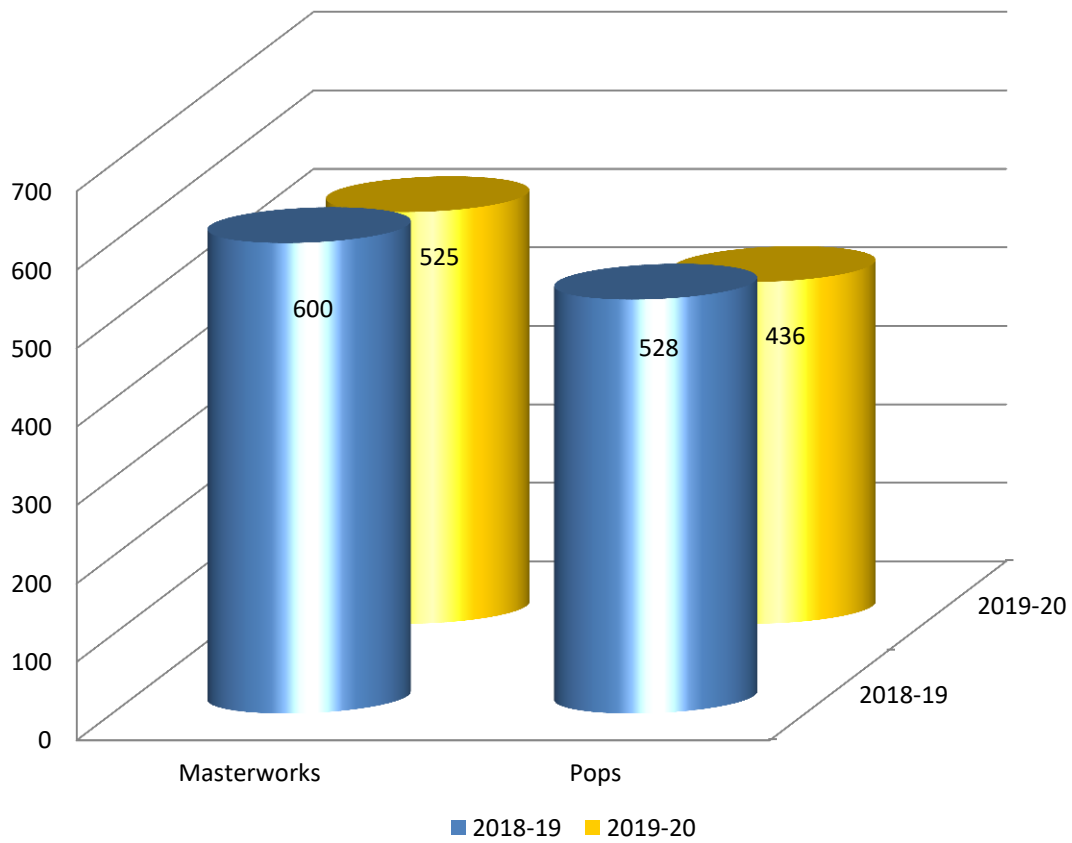
So, this has been a pretty strange year, right? “Nobody expects the Spanish Inquisition” – *Monty Python's Flying Circus*... or this – COVID-19. We're all pretty tired of hearing the words *challenging* and *unprecedented*, so I'll spare our readers the need to digest them yet again. Yes, a pandemic stopped the entertainment industry in its tracks and yes, it has been exceptionally difficult to weather for orchestras, but in addition to presenting great symphonic music, we have expanded our job description to include identifying silver linings.

We unexpectedly held the final Masterworks Concert of our 59<sup>th</sup> season, ***A Night at the Opera Returns***, on February 8<sup>th</sup>. Opera programs are, hands down, our most popular classical concerts every year and this one was no exception. Maestro Nir Kabaretti led the orchestra in a performance that resulted in four curtain calls and even dazzled our musicians! Many of them said it was one of the most thrilling concerts they had performed under his baton. Plus, we were able to celebrate the Maestro's birthday in the Conductor's Circle Club at the end of the evening. Our final Pops Concert of our 59<sup>th</sup> season, ***Mashupalooza*** featuring Maestro Steve Hackman, on Leap Day (how appropriate!), played to a remarkably full house. Its mission was accomplished. We enlightened our classical patrons and intrigued hundreds of young concertgoers through contemporary/classical fusion and Maestro Hackman's innovative accompanying narrative. Our final Small Stage Symphonies performance, ***Cabaret with Kabaretti***, happened on Friday, March 6<sup>th</sup> featuring our beloved Maestro Nir Kabaretti and one of our favorite guest artists, Broadway legend, Lisa Vroman, at Cape Cabaret with an audience comprised of many of our dearest friends.

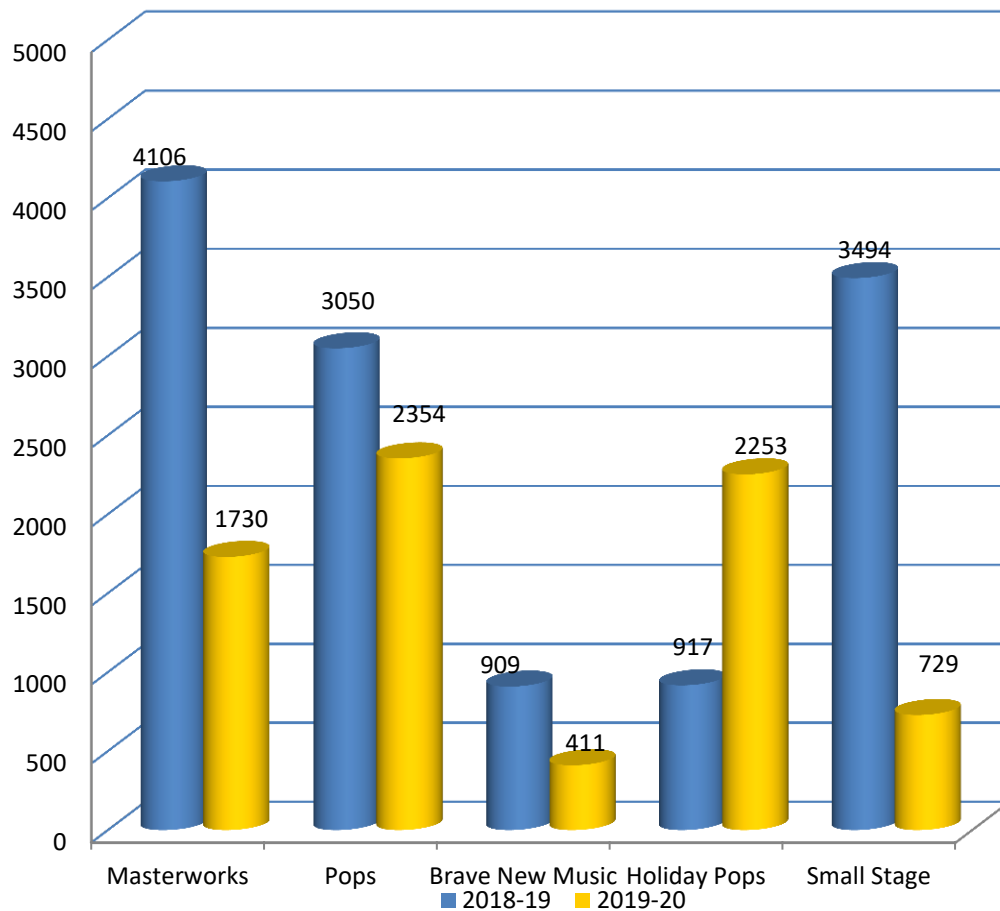
Days after our final performance, our exceptional staff began packing up our office technology and rerouting office calls to our cell phones. We formulated a plan, continued to put one foot in front of the other and kept the orchestra running. Even in the throes of this maelstrom, we completed a complicated audit, created a structure for continuing to disseminate engaging and educational e-communication to our patrons on a regular basis, forged ahead on negotiating a fair and balanced Collective Bargaining Agreement, applied for and received a Federal Payroll Protection Program loan/grant that made our artistic staff almost financially whole through the rest of our 59<sup>th</sup> season, applied for and received an Economic Industry Disaster Loan, relocated our office to a rent-free facility that also includes utilities (and it is a beautiful space, worthy of a symphony orchestra!) thanks to Sanibel Captiva Community Bank and built budget after budget, plan after plan, including launching, then pausing a search for the Southwest Florida Symphony's next Music Director, trying to anticipate what the future held for this beloved institution. We're still not 100% sure when things will return to normal or what that new normal will look like, but this orchestra has survived hurricanes, recessions, burglaries, on-stage injuries, hecklers at past Annual Meetings, the need for last minute guest artist understudies, the delivery of a two-legged piano **and** a pandemic. We're pretty strong and resilient for an orchestra just passing middle-age.

I hope you find reading this narrative as therapeutic and reassuring as I did through writing it. Alan Valentine, the CEO of the Nashville Symphony is a very dear friend of mine (and friend of this orchestra). He has often said to me, “It'll all be OK in the end. If it's not OK, it's not the end.” This is hardly the end for us. It's an unexpected new beginning. Onward.

## Subscription Sales



## Single Ticket Sales (w/o subscriptions)





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## NEWS RELEASE

FOR IMMEDIATE RELEASE

Date: July 14, 2019

Contact: (239) 418-0996

Media contact: Amy Ginsburg, Executive Director: [aginsburg@swflso.org](mailto:aginsburg@swflso.org)

## The Southwest Florida Symphony Announces its Trailblazing 59th Concert Season

**Fort Myers, FL** – The Southwest Florida Symphony, Lee County’s only professional orchestra and the fourth oldest in the state, announces its greatly anticipated 2019-2020 season lineup of performances. The Symphony’s 59<sup>th</sup> season, **uncharted TERRITORY**, features innovative music by groundbreaking new composers and performances by rising superstar guest-artists along with performances of great classical repertoire that inspired them.

The Symphony bookends its 59<sup>th</sup> season with a new concert series called **Brave New Music**. The first concert of this series features a screening of the Alfred Hitchcock classic horror film, **Psycho** with live orchestra, on Friday, October 25, 2019 at the Charlotte Performing Arts Center in Punta Gorda, and on Saturday, October 26, 2019 at Barbara B. Mann Performing Arts Hall at FSW. **Brave New Music** caps off the orchestra’s 59<sup>th</sup> season with **SymPHABULOUS!: A Symphonic Drag Show** featuring special guest artist, finalist of NBC’s hit TV show *The Voice*, Chris Weaver and his drag persona, Nedra Belle. **SymPHABULOUS!** Happens one night only, Saturday, May 16, 2020 at Barbara B. Mann Hall at FSW.

The Masterworks Classical Concert Series features familiar and well-loved works like Holst’s *The Planets*, Bruckner’s Symphony No. 4, breathtaking arias from a variety of popular operas and, in celebration of Beethoven’s 250<sup>th</sup> birthday, there will be no shortage of the composer’s repertoire. The Symphony’s music director, Maestro Nir Kabaretti has masterfully woven contemporary compositions throughout our Masterworks Series to complement familiar works. Included in Masterworks repertoire are film score icon John Williams’ Star Wars Suite, African-American female composer Florence Price’s Symphony No. 1 in E minor and 90s rock & roll superstar-turned classical composer, Ben Folds will perform his own Concerto for Piano and Orchestra to conclude the series. Masterworks Series concerts happen on November 9, 2019, January 11, 2020, February 8, 2020, March 21, 2020 and May 2, 2020.

The Pops Series also expands musical horizons with three unique programs; The Music of Queen on January 31, 2020 at Charlotte Performing Arts Center and February 1 at Barbara B. Mann Hall, **Mashupalooza: A Stereo Hideout Production** hailing the highly anticipated return of rising star classical-pop fusion artist, Steve Hackman on Saturday, February 29, 2020 at Barbara B. Mann and a festive evening of music and revelry with **Prohibition**, the music of the Roaring 20s, on Saturday, April 18, 2020. The Symphony will also perform its annual beloved Holiday Pops program, **Christmas in Paradise**, featuring the return of postmodern crooner from last season’s **Sinatra and Beyond** program, Tony Desare.





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Holiday Pops programs happen on December 13, 2019 at the Village Church at Shell Point, December 14 at Barbara B. Mann Performing Arts Hall and December 15 at First Presbyterian Church in Bonita Springs.

The Symphony continues its Small Stage Symphonies Series as well, bringing smaller ensembles to venues throughout our community. Small Stage Symphonies happen in January, March and April in Cape Coral, Ft. Myers, Sanibel Island and Shell Point Village.

Further details on the Symphony's 59<sup>th</sup> season are available by calling (239) 418-1500 or online at [WWW.SWFLSO.ORG](http://WWW.SWFLSO.ORG). Season subscriptions and single tickets to some individual concerts are currently on sale.

### **About Maestro Nir Kabaretti**

Internationally acclaimed conductor Nir Kabaretti continues to expand his global artistic reach across the Americas, Europe and the Middle East, thrilling audiences with his dynamic conducting style and beneficially influencing the institutions he serves through sharing his vast knowledge in all facets of musical performing arts. This year, he enters his 6<sup>th</sup> season as **Music Director of the Southwest Florida Symphony**, while continuing his tenure as **Music and Artistic Director of the Santa Barbara Symphony** in California, where he'll embark on his 13<sup>th</sup> season. In 2018, he was appointed as **Music Director of the Israel Sinfonietta Be'er Sheva**. Described as "*a conductor with immense musicality and warm personality*" by his mentor Maestro **Zubin Mehta**, Kabaretti has earned an impressive reputation across continents for his command of a vast symphonic, operatic and ballet repertoire.

More information about Maestro Kabaretti may be found [HERE](#).

### **About the Southwest Florida Symphony**

The Symphony made its debut as a community orchestra on April 15, 1961, playing in schools and community centers, with a roster of just 24 musicians. Today, the symphony has a roster of 70 world-class musicians, and is Lee County's only fully professional orchestra. The Southwest Florida Symphony's 59th year continues the orchestra's tradition of artistic excellence as internationally renowned Maestro Nir Kabaretti leads another exciting season of spectacular performances. Maestro Kabaretti, the fifth music director in the organization's history, led critically acclaimed performances throughout his first five seasons with the Southwest Florida Symphony, and in 2017, he extended his contract as Music Director through the 2019–2020 season.

More information about the Southwest Florida Symphony may be found [HERE](#).



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### **Our Generous Sponsors**

The Southwest Florida Symphony's 2019-20 sponsor list includes The City of Fort Myers, The State of Florida Division of Cultural Affairs, The Florida Council on Arts & Culture, The Southwest Florida Symphony Endowment Foundation, The Southwest Florida Symphony Society, Seminole Hotel Casino, The L.A.T. Foundation, Uhler & Vertich Financial Planners, Ellie Fox, Burgess Brant Consulting Engineers, Florida Weekly, Mrs. Dorothy Munsch, The Estate of Charles B. Munsch, Bailey's General Store, Sanibel Captiva Community Bank, Iberia Bank, The Friends of the Symphony on Sanibel, Ernie Fogg Sr. & Margot Flinn, Mr. Jeff Cull and Ms. Ella Naylor, Craig Choate, Rob and Ruth Diefenbach, Mr. Eric Diefenbach and JK Brown.

#####

Ellen W. Clifford, SOUTHWEST FLORIDA SYMPHONY SOCIETY

## ANNUAL REPORT

2019-2020

The mission of the Southwest Florida Symphony Society is to support the Southwest Florida Symphony Orchestra through volunteering, fund raising, community engagement, and education. Our generous membership give freely of their time, talent and treasure to help us achieve those goals.

## SUPPORT SERVICES

During the 2019-2020 season, the Society scheduled nineteen fund raising events. Three were major events advertised to the community; other smaller events were hosted by individual Society members. Unfortunately, five of these smaller events had to be cancelled. The Society also raised money through the Key Signatures program and the annual Bridge Marathon.

High points of the season were the “Stardust and Strings” event, held at the Heitman House, and the welcome return of “Holiday House”. Both events were very successful and increased our visibility in the community. Through the unstinting hard work of our membership, we were able to raise just over \$60,000.00, even though our season was severely truncated.

## EDUCATION

The Society furthers the musical education of young artists in our area by awarding various scholarships. Our membership generously donated to a scholarship fund to benefit the Youth Orchestra. During the 2019-2020 season, the Society awarded two \$2000.00 scholarships to the winners of our scholarship competitions.

## ADDITIONAL ACCOMPLISHMENTS

An important goal of the 2019-2020 season was to continue the progress made during the 1018-2019 season of strengthening the relationship between the Society and the Symphony and to chip away at a notion of “separateness” between the two organizations. The eager participation, support, and assistance of Symphony officers, particularly during the Holiday House, was invaluable and was greatly appreciated.

The Symphony Society looks forward to providing meaningful and growing support to the Southwest Florida Symphony in the future.

Respectfully submitted,

Ellen W. Clifford, President, Southwest Florida Symphony Society, 2018-2020.

# ANNUAL REPORT

October 20, 2020

Education & Community Outreach Report for 2019-20 (Season 59)

Kara Griffith, Director of Education & Community Outreach

## Education & Community Outreach Programs



**MAJORS FOR MINORS:** This program is offered to certain elementary schools and features a Symphony Ensemble in a 50-minute live and up-close program of musical elements, composers, music history Q&A, and other areas of music.

Seven schools were scheduled to receive a Brass Quintet presentation during April and May, 2020, all of which had to be canceled. I attempted to organize the brass quintet members to be recorded individually and shared with participating schools, but logistics and school ending in May prevailed. Majors for Minors appearances are usually funded by a Sustaining Partner who is encouraged to select their school location, and who is also invited to attend. One school, The Sanibel School, is usually funded annually by the Sanibel Kiwanis Club.

**Goals** for this program include acquiring more Sustaining Partners which would then open up the opportunity to more schools, and to increase the number of viable ensembles available to send to

schools to include a choice of representation as well.

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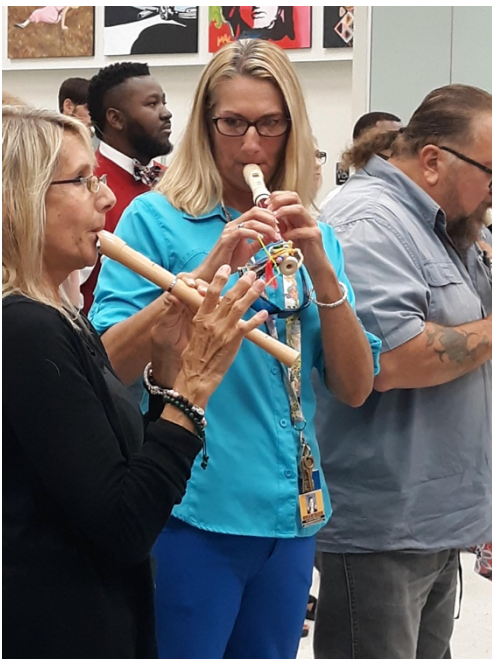


## YOUNG PEOPLE'S CONCERTS:

These concerts are presented annually to Lee County students. The concerts feature our professional musicians performing pieces like "Carnival of the Animals" (our 2019 concert, right) and themed programs like "A Tribute to Nature". The audience is comprised of primarily students, though teachers, and guests attend as well. In the past, the concert has been held at Barbara B Mann Hall and has reached as many as 2500 students. To keep costs down in 2019, we performed for 850 students at North Fort Myers High School.

For our 2020 YPC, I was excited to partner with Carnegie Hall's highly effective program called Link Up. I had recruited 950 students/15 Elementary schools for our highly-anticipated March 31, 2020

performance, which also had to be cancelled due to the pandemic. One of the highlights of Link Up is the pre-partnering with participating schools to teach their students all of the pieces (on recorder or violin), lyrics, and dance steps culminating in a joint concert, with students actually participating (and not just passively observing) from the audience. In January and February, I had successfully provided two teacher training sessions (below), and their students were eagerly learning their parts.



Due to the size of the orchestra necessary to perform the Link Up music, the concert budget was higher than the smaller, 2019 Carnival of the Animals. For this reason, as well as the pre-planning required to collaborate with schools, I do not believe we can get the momentum to reschedule a Link Up Concert for 20-21 season, but I do hope to get the opportunity to offer a much smaller and less costly version of Jim Stephenson's "Compose Yourself" sometime TBD in the 20-21 season.

**Goals** for this program include attaining a regular schedule and committing to a yearly YPC concert, reaching the maximum number of students possible, and obtaining enough grants and donations for this concert to be completely and independently self-sustaining.

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**YOUTH ORCHESTRA PROGRAMS:** This program provides young musicians with the opportunity to perform in the Sinfonietta or Youth Orchestra and a few in the YO Ensembles. Woodwind coach and flutist Angela Massey, Youth Orchestra manager, has done a wonderful job organizing, recruiting, increasing numbers, and motivating the students, parents, coaches, and conductors (Katrina Rozmus and Nathan Fish). The Youth Orchestra and Sinfonietta completed 4 out of 5 scheduled concerts last season, cancelling the May 31 final concert. Our annual fundraiser has not yet been planned or scheduled, pending other decisions.



I have begun discussions with conductors and coaches about online auditions and online coaching opportunities (until in-person can resume feasibly).

**Goals** for this program include resuming all in-person activities (and possible online until then), increasing membership, increasing community presence and awareness, building quality, better planning, and increasing fundraising to meet and cover significant budget needs.

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**DISCOVERY CLUB:** This offers the opportunity for students K-12, for a one-time fee of \$15, to attend the Symphony concerts (up to 3 tickets for \$5 each) and rehearsals to have more exposure and up-close-and-personal experiences with our music and musicians. Discovery Club membership increased significantly in 19-20, up to about 250 students. I offered numerous Discovery Club events, including artist meet and greets (left), backstage tours, and pizza parties, with about 10-12 in attendance for each.



Until our concerts were cancelled, I had scheduled a Discovery Club event at every concert at Barbara B Mann Hall or The Sidney & Berne Davis Art Center. In 19-20, Dick Prescott generously funded DC memberships to 19-20 Youth Orchestra members as an incentive for them to attend more symphony concerts. 131 tickets (down from 161) were bought using the Discovery Club advantage last season.

**Goals** for this program are to recruit through other means (social media, recommendation, in person) in order to increase awareness and students served, and also to increase participation in the events offered, once they resume.

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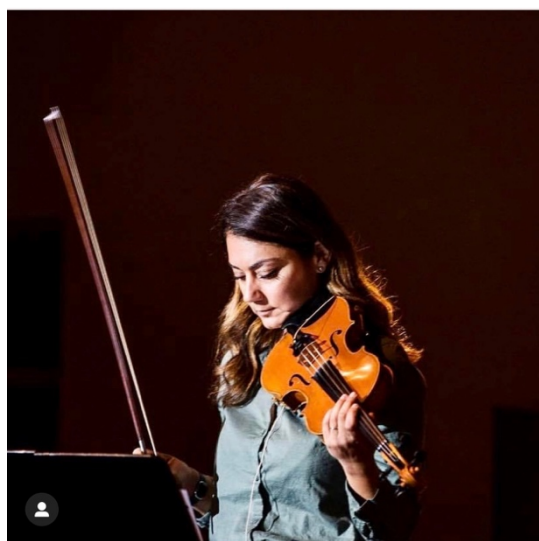
**SOUND LAB:** The SWFLSO offers a travelling set of hands-on string, brass, and woodwind instruments to be taken to and shared with community families through invitations to fairs, art shows, markets, etc. The instruments were generously restored by funds raised at the 2019 Chair Sponsorship benefit, and are now in perfect working order to best represent the orchestra after being serviced by Cadence Music.

The Sound Lab made a very well-received appearance at WGPU's "Be My Neighbor Day" at the FGCU campus in March of 2019 (right), where our table was inundated by curious young musicians non-stop from 9:00 until 1:00! But the 2020 "Be My Neighbor Day" has been postponed and rescheduled several times due to Covid 19, and I am awaiting their latest plan. The sharing of these instruments post-Covid (even using disinfectant) may not be an option.



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**SOCIAL MEDIA & DIGITAL COMMUNICATION:** At the onset of the Covid 19 quarantine restrictions, I realized our only 'product' would have to be digital, and so offered to write as community outreach Social Media posts (for Instagram and Facebook pages), and also to send a weekly 'suggestions' newsletter to all of our 5000+ email subscribers through Constant Contact. To date, I have researched and created 26 themed Eblasts including topics such as Conducting Insights, Theme & Variations, Double Concertos, Fireworks, and Clash of the Classics, each with 6-8 links to beautiful classical music performances or topics to enjoy. Reader response is positive, and I hope to convey that we are still here for the community, and that classical music in all of its varied and beautiful iterations, is worth waiting for!



Believing that our musicians are our greatest (and most interesting) asset and engagement tool, I have also so far interviewed and written 24 bios about our musicians (including Dilyana Tsenov, left) to post on social media, and which are now also being shared weekly through our Eblast contacts.

**Goals:** Ultimately, a marketing person would probably pick up these initiatives and make improvements unrealized by me, but I am enjoying representing the orchestra through both of the pursuits very much right now.

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**MASTER CLASSES:** These classes, which usually feature guest soloists performing with our Symphony Orchestra, in the past have been given to the Youth Orchestra students or other area students. There was some discussion but no scheduled Masterclasses during the 19-20 season.

**Goal:** would be to reinstate some of these wonderful education and connection opportunities between the SWFLSO and the music community. I will continue initiating conversations between myself, the future orchestra manager, and artists' representatives to see if we can add a few of these to this year's schedule.

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**STUDENT RUSH:** In 19-20, communication and information were regularly provided to FGCU, FSW, Hodges and Keiser Universities via posters, email and social media to promote the Symphony Orchestra concerts and events. 11 students (down from 49) took advantage of rush tickets this past year.

**Goals** here would be to increase the number of Student Rush guests through more active and ongoing advertising.

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**MUSIC FOR LIFE:** This is a partnership with other community non-profit organizations that address the underserved or those in need in Lee County to provide complimentary tickets to groups, families, and individuals to attend the Symphony Concerts. This year, we served 149 (down from 215) individuals representing 21 organizations like Big Brothers Big Sisters, Goodwill, and PACE Center for Girls through this program.

**Goal:** We will continue to promote and encourage greater participation and new partners in the upcoming season.

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**SCHOLARSHIPS:** The Education department receives numerous scholarships from various donors. During our 19-20 season, we were able to award 9 Youth Orchestra members with full or half tuition scholarships. One generous Education committee member also donated funds for 3 summer lesson scholarships used during the pandemic, and I was still able to connect a deserving Youth Orchestra graduating senior with the YO Hudson Scholarship (through the Society), even though the program was cut short.

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#### **FUTURE GOALS:**

- Increase grant and foundation support- Carrie Care did a wonderful job guiding us through former applications, and I look forward to working with Betsy Dane in this area.
- Increase individual support, particularly through Sustaining Partnership, to include a minimum of 12 Sustaining Partners (currently 7)
- Present a Majors for Minors program in at least 10 elementary schools (previously 7)



- Restore the YPC to a regularly scheduled event, and attempt to increase student/guest audience (currently 950)
- Stabilize and revitalize the YO program again after a promising year cut short and interrupted by the Covid 19 cancellations
- Reinstate one or two master classes offered by our visiting guest artists
- Increase participation in Discovery Club and Student Rush opportunities by better information- sharing and marketing, and by offering increased and interesting member-only activities to Discovery Club during each of the Barbara B Mann and Sidney & Berne Davis Art Center concerts.
- Bring the Sound Lab to numerous public events (when safe) and possibly connect Youth Orchestra students to this task as a scholarship/ volunteer hours endeavor.

The goal of the Southwest Florida Symphony Education & Outreach Program is “to offer music education and enrichment opportunities to Lee County students through maintaining and increasing our existing programs and the development of new ones.” Monthly Education Committee meetings (12 members) met monthly through March, 2020 with optimal support and results. I am very grateful to the Education Committee, the parents, the conductors, the staff and all the volunteers who help to make our programs successful. Thank you for your support and we hope that it will continue and grow so that the Symphony Education & Outreach programs continue to serve our youth. These young musicians and concert-goers are not only our future orchestra members who will ensure that professional and inspirational music continues in our community, they are also our future doctors, engineers, teachers, world leaders, arts lovers and visionaries who will reach their full potential because we enhanced their lives through music.

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