



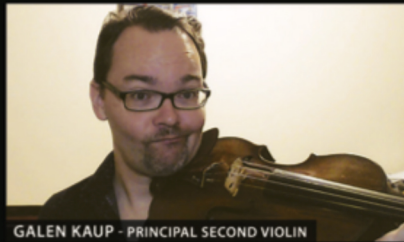
TOM UHLER - BOARD CHAIRMAN



AMY GINSBURG - EXEC DIRECTOR



NIR KABARETTI - MUSIC DIRECTOR



GALEN KAUP - PRINCIPAL SECOND VIOLIN



ALEXIS SMITH - PRINCIPAL TROMBONE



TODD BETZ - PRINCIPAL PERCUSSION



DEAN ZHANG - KEYBOARD



NORA LASTRE - VIOLIN, LIBRARIAN



DILYANA Z. TSENOV - VIOLIN



KRIS MARSHALL - PRINCIPAL TRUMPET



ANGELA MASSEY - FLUTE



HILARY GAMBLE - VIOLA, PERSONNEL MANAGER



THE SOUTHWEST FLORIDA SYMPHONY

PLAYING IT BY EAR



Annual Meeting
October 12, 2021
5:30pm

TABLE OF CONTENTS

Board of Trustees President's Letter.....	5
Minutes from 2019 Annual Meeting.....	6
Financial Report—Assets & Liabilities	9
Actual Income.....	10
Actual Expenses	11
Endowment Foundation Report.....	12
Executive Director's Message.....	14
Ticket Sales Summary	15
2019-2020 Season Announcement	16
Symphony Society Report.....	21
Education and Outreach Report	22
Donor List—2019-2020 Season	27
Sponsors—2019-2020 Season	31



Annual Meeting
October 12, 2021
5:30-7:30
Artistic & Operations Center at Bell Tower
and
Via Zoom

Agenda

Welcome and Call to Order	Tom Uhler
Approval of 2020 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.**



Youth Orchestra Concert



TinyPops @SBDAC



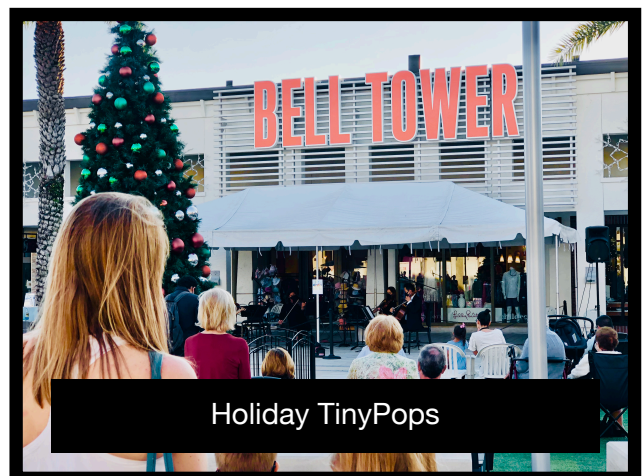
Beethoven v. Coldplay @BBMann



Farewell to Nir @Tribby



Brave New Chamber Music @Gulf Theater



Holiday TinyPops

Southwest Florida Symphony Orchestra

President's Annual Meeting Letter 2021

It feels like we should break out in Cole Porter's *Another Op'nin', Another Show* from Kiss Me, Kate. The abbreviated 2020-21 season is behind us, and we're op'nin' with a season of pops shows and a quartet of selected music director candidates conducting our orchestra. Life is good!

The bad news is that we weren't able to present a full season last year; the good news is that we **are** this year – with your support.

We haven't been idle since the spring of 2020. We moved into our new Artistic & Operations Center at the Bell Tower; we presented Tiny Concerts, we continued our youth programs... and we prepared for this season.

Yes, the world is different, but great music is here to stay and there's a lot to celebrate. I'm happy to report that your orchestra is in excellent shape – financially stable, well-staffed and ready to celebrate our Diamond Jubilee Season.

Your presence at our Annual Meeting signals your support and your financial commitments confirm it. As a donor, you're just as important to our success as a performer or a staff member; it takes **all** of us, working together, to present history's greatest compositions.

This year, with the added perspective of the pandemic, think about how YOU want to be remembered. Talk to us about the simple process of leaving a legacy; we have specialized professionals who will volunteer to assist you in the process.

Call me at (239) 936-6300 or 472-3817 to discuss your thoughts in confidence.

Thank you for your ongoing support. And now, on with the show!

Tom Uhler

SOUTHWEST FLORIDA SYMPHONY ORCHESTRA AND CHORUS ASSOCIATION, INC.

ANNUAL MEETING MINUTES

OCTOBER 20, 2020

Virtual Meeting via Zoom

Present: President-Tom Uhler, Trustees: Joseph Broughton, Jeff Cull, Rob Diefenbach, Alan Evans, Thomas Kracmer, Liz Marnul, Gary Niethamer, Anne Wardlow.

Also present: Executive Director- Amy Ginsburg; President of Southwest Florida Symphony Endowment- David Hall; Financial consultant- Dylan Zsebe; Staff members- Kara Griffith, Sara Soderholm, Keenan Riley, Nora Lastre, Alex Albanese, Donna Berthel; and members of the public, including: Sue Mathews, Jane King, Carol Robinson and Cynthia Duff.

PRESIDENT UHLER CALLED THE MEETING TO ORDER AT 5:01 P.M.

APPROVAL OF MINUTES

David Hall moved that the Minutes of the October 23, 2019 Annual Meeting be accepted as presented. Liz Marnul seconded the motion. The minutes were adopted as presented.

FINANCE REPORT

The Finance Report was provided in the Annual Report. Financial consultant, Dylan Zsebe explained the figures in the Finance Report and compared the results of the 2018-2019 and 2019-2020 fiscal years. He pointed out that most of the Symphony's revenues come from individual contributions and ticket sales, and the two largest expense categories are artistic and administrative.

Carol Robinson, a member of the public, asked a number of questions regarding the financial report:

1. *Why did administrative costs increase by \$132,000 in 2019-2020?* Amy Ginsburg and Dylan Zsebe explained that the increase can be attributed to several factors: staffing, conductor search consultant fees and legal fees.
2. *How much does the Endowment Foundation contribute to Symphony?* David Hall explained that the Endowment Foundation normally transfers 5% to the Symphony and also shares in part of marketing costs. However, because the Foundation was unusually profitable recently, it was able to contribute additional funds to fill in a loss at the Symphony.
3. *Who are the business sponsors of the Symphony?* Amy Ginsburg said that sponsors are listed in the Annual Report.
4. *Why did the reported net worth of the Symphony decline from \$210,000 in 2016 to \$11,000 at the end of 2019-2020 fiscal year?* Dylan Zsebe explained that in the 2019-2020 fiscal year, the Symphony secured Economic Disaster and Payroll Protection loans that were made available due to the pandemic. These funds are categorized as loans and listed as liabilities. Because most of the Payroll Protection funds were paid to musicians to make up for wages lost due to the

pandemic, that \$184,000 loan will qualify to be forgiven and will eventually be removed from liabilities. This will restore the Symphony to a higher net worth.

5. *Is there a Development Committee?* Tom Uhler responded that, currently, there is not a Development Committee, but experience has taught him that the most effective way to develop relationships with prospective donors and sponsors has been through personal interaction with the prospects by President Uhler, Amy Ginsburg and the internal development director. David Hall commented observed that it is a sad commentary on the community that it doesn't provide more support, but said that this same problem applies to all community organizations. Carol Robinson opined that the Board should have more local business people on the Board, as the current members do not have the right contacts in the business community. Cynthia Duff, a member of the public, said that her small company was able to support community organizations in the past, but with the current pandemic, they have to get money from the government to be able to continue to exist and they no longer have resources to contribute to worthy organizations. Amy Ginsburg pointed out that every concert in the previous season had a sponsor and that momentum was very good for sponsorship by the community, until the pandemic hit. Now, we must be realistic and sensitive to the fact that it will be very difficult or impossible for many businesses to be able to provide financial support to the Symphony or any other organizations in the near future. David Hall commended the Symphony administration for the efforts they make to address funding in the current, very tough environment.

REPORT OF THE ENDOWMENT

David Hall, President of the Endowment Foundation provided summary comments in connection to the June 30, 2020 Financial Statements in the attached Annual Report. He reported that the Endowment enjoyed excellent investment returns in recent years and also recently received a generous contribution. He said that the Endowment Foundation plans to contribute \$107,000 to the Symphony for the 2020-2021 fiscal year. Mr. Hall named and thanked each member of the Endowment Foundation Board for their valuable service to the Endowment Foundation.

REPORT OF THE EXECUTIVE DIRECTOR

Amy Ginsburg listed a number of significant events that took place in the 2019-2020 season. She noted that the Symphony had been quite successful in reaching new audiences in 2019-2020 season through creative and popular music programs and by adding of new venues. The SWFLSO had been gaining more notoriety and was better defined with audiences. Unfortunately, that momentum was interrupted by the pandemic when programming had to come to an immediate halt. Everyone had to work from home. The Symphony was able to secure Payroll Protection funds from the government which enabled the Symphony to pay musicians for most missed work.

Ms. Ginsburg introduced her staff, who were in attendance: Keenan Riley (Box Office Manager), Nora Lastre (Librarian, who has also assumed some General Manager duties), Donna Berthel (Bookkeeper and Office Manager), Sara Soderholm (Development Director), Kara Griffith (Education Director, who also prepares weekly emails communications that have been distributed to subscribers, supporters and youth during the pandemic in order to maintain a connection) and Alex Albanese (Operations Manager).

Ms. Ginsburg also acknowledged the contributions of Hillary Gamble, Personnel Manager for the musicians, who was unable to attend the Annual Meeting.

CLOSING COMMENTS BY THE BOARD CHAIR

President Uhler reminded everyone that the mission of the Southwest Florida Symphony is to provide our community with quality, live, and professionally delivered music. In doing this, we must be financially responsible and have a good staff that supports the mission. While the Symphony is currently in a good financial position, it is very sad to be forced to the sidelines for now by the pandemic. Tom Uhler noted that Amy Ginsburg made many connections through her leadership course at the League of American Orchestras and this has been valuable to us as we navigate the pandemic. The Symphony is listening to what other organizations are doing in this environment, not to follow, but to learn. Fortunately, the Symphony is small enough to stay agile.

Tom Uhler expressed appreciation to Sanibel-Captiva Community Bank for their very generous donation of free office space in a very professional and well-located building. He announced that Nir Kabaretti has very kindly agreed to continue to serve as an artistic advisor to the Symphony while we are without a Music Director.

President Uhler thanked everyone for attending the Annual Meeting and said that he hoped to be able to see everyone in person soon.

The meeting adjourned at 5:30pm.

Respectfully submitted,

Anne Wardlow, Acting Secretary

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

Three Year Comparison
as of June 30,2021

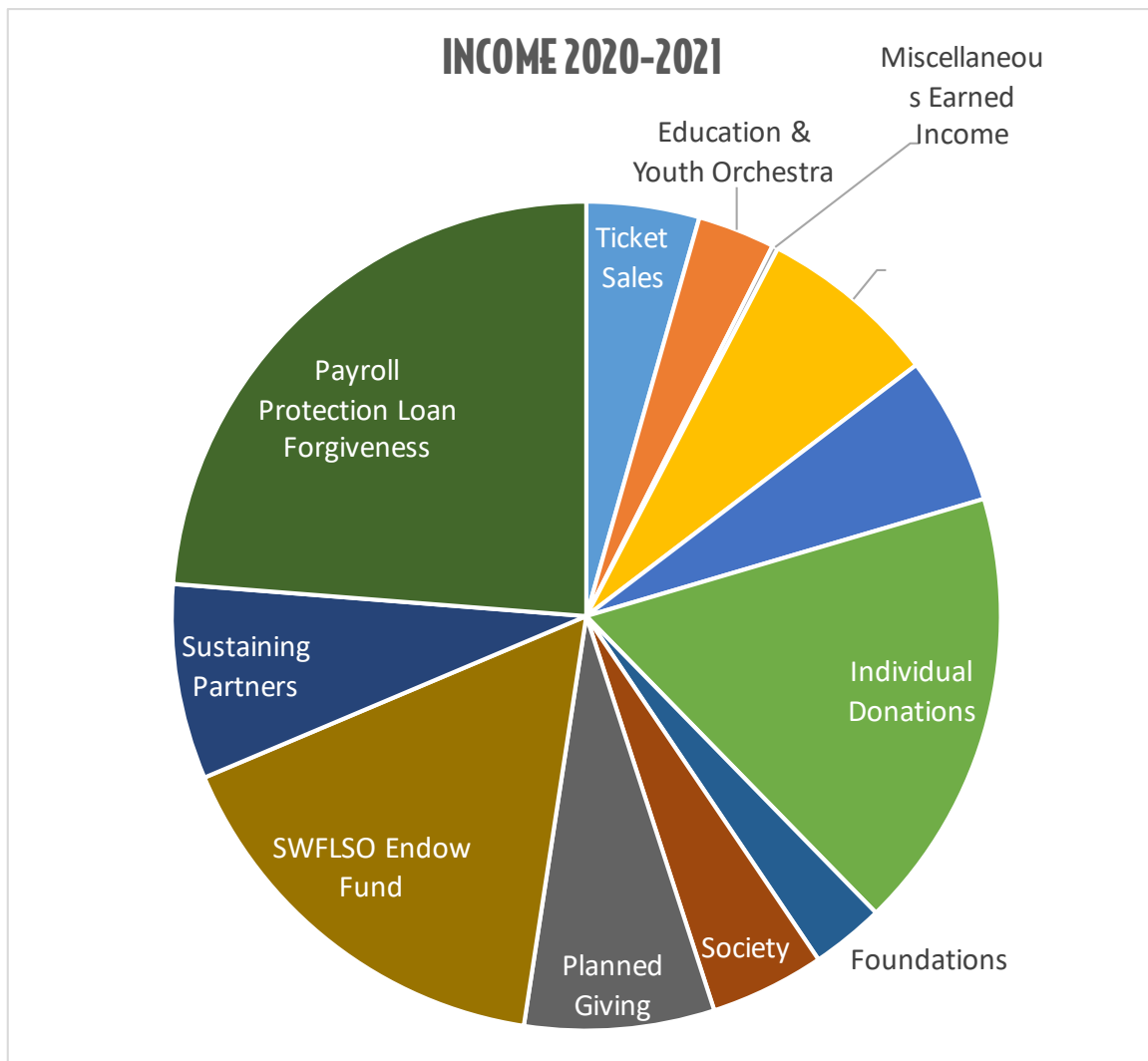
Assets	2021	2020	2019
Check/Savings	269,735.99	183,799.00	48,513.00
Fixed Assets	2,038.69	6,066.00	12,302.00
Accounts Receivable	16,310.00	7,610.00	12,310.00
Other Assets	38,074.50	36,029.00	15,780.00
Community Foundation	212,462.00	212,462.00	212,462.00
Total Assets	538,621.18	445,966.00	301,367.00

Liabilities & Equity

Liabilities			
Accounts Payable	9,380.50	19,091.00	12,775.00
Current Liabilities	3,985.85	184,659.00	5,544.00
Deferred Program Revenue	59,518.70	71,287.00	186,887.00
Notes Payable	149,665.88	159,900.00	-
Equity	316,070.25	11,029.00	96,161.00
Total Liabilities & Equity	538,621.18	445,966.00	301,367.00

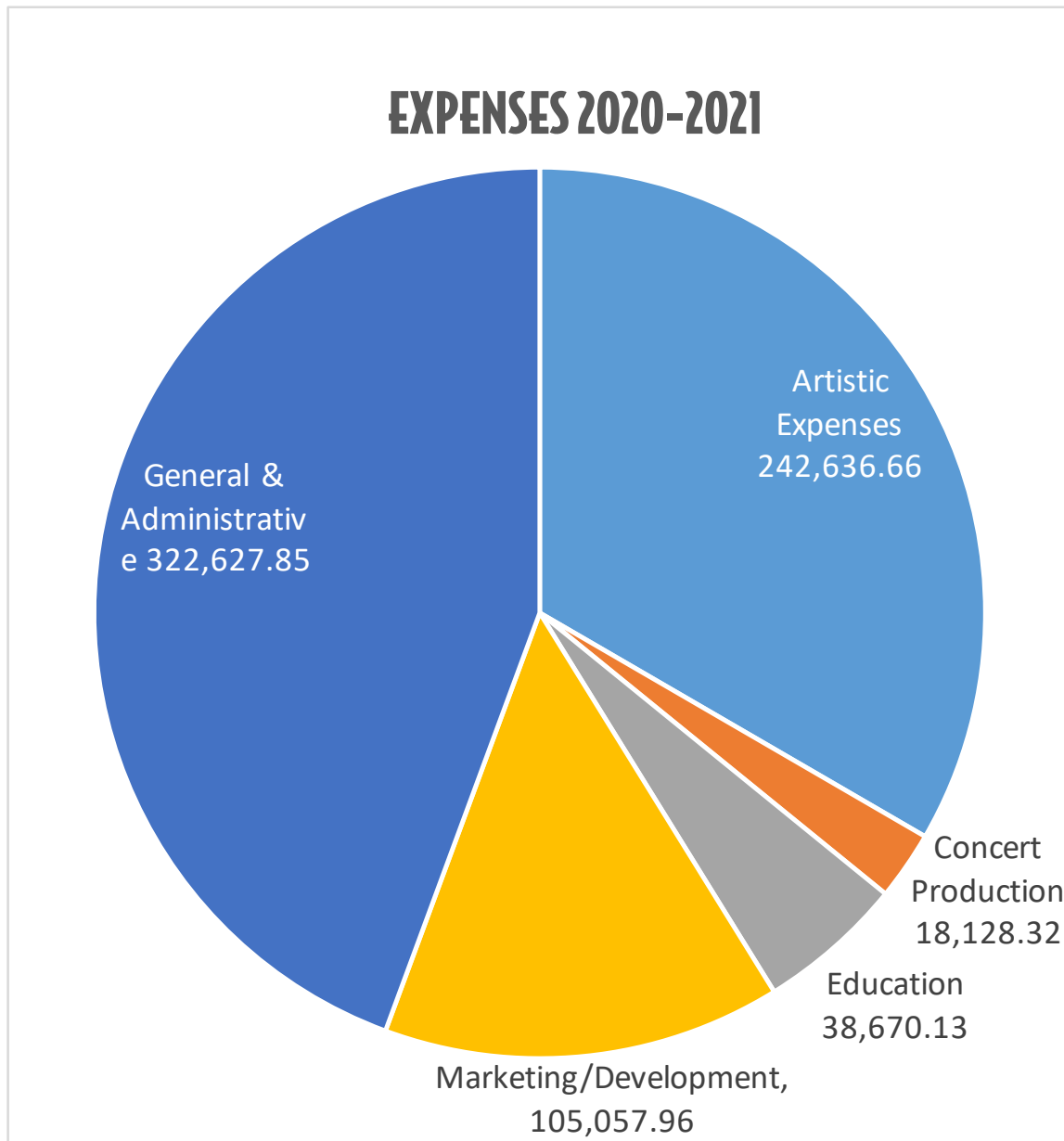
ACTUAL INCOME 2020-2021

Categories	Income	
Ticket Sales	32,690.61	4%
Education & Youth Orchestra	22,389.95	3%
Miscellaneous Earned Income	1,682.70	0%
Government Grants	52,004.00	7%
Business Contributions	43,014.02	6%
Individual Donations	128,197.52	17%
Foundations	21,147.04	3%
Society	33,180.60	4%
Planned Giving	55,000.00	7%
SWFLSO Endow Fund	120,500.00	16%
Sustaining Partners	56,500.00	8%
Payroll Protection Loan Forgiveness	<u>176,500.00</u>	24%
Total Income	<u>742,806.44</u>	<u>100%</u>



ACTUAL EXPENSES 2020-2021

Categories	Expenses	
Artistic Expenses	242,636.66	33%
Concert Production	18,128.32	2%
Education	38,670.13	5%
Marketing/Development	105,057.96	14%
General & Administrative	322,627.85	44%
<hr/>		
Total Expenses	727,120.92	100%





**Southwest Florida Symphony
Endowment Foundation**
7500 College Parkway, Suite 200
Fort Myers, Florida 33907
239-910-3673
davidcarletonhall@embarqmail.com

**Annual Report
June 30, 2021**

The Southwest Florida Symphony Endowment Foundation ended fiscal year 2021 with a market value of \$3,472,917, which was \$1,243,222 more than \$2,229,695 a year ago. The General Fund (unrestricted) totaled \$3,257,179 and the Van Sickle Fund was \$215,738. The General Fund included \$26,794 for the John Hudson Fund.

During the fiscal year ended June 30, 2021, the Endowment Foundation shared the symphony's development director. The total known estate commitments are approximately \$4 million to \$4.5 million.

During the year ended June 30, 2021, the Endowment Foundation had the following cash flow:

Total Assets as of June 30, 2020	\$2,229,695
Grants Paid to the Symphony	(107,000)
Grants Paid by the Van Sickle Fund	(10,000)
Grant Paid by the Hudson Fund	(1,000)
Operating Expenses (including \$20,250 for marketing reimbursement)	(21,089)
Donations Received	121
Symphony received bequests and transferred the funds to the Endowment Foundation to manage	556,277
Funds transferred from the Collier County Community Foundation	120,967
Investment Results:	
Interest, Dividends	44,423
Realized Net Gains due to repositioning portfolio	105,858
Unrealized Net Increases in Investment Values	<u>554,665</u> <u>704,946</u>
Total Assets as of June 30, 2021	<u>\$3,472,917</u>

During the last fiscal year, the Endowment Foundation made a grant to the Symphony of \$107,000. The \$107,000 grant represented 4.80% 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. During the current fiscal year ending June 30, 2021, the Endowment Foundation committed to granting \$122,000, or 3.51% of the general fund as of June 30, 2021. The amount

of the grant was determined using average assets during the past 15 months of \$2,442,022 and a 5% grant. This will be paid when the Symphony requests the funds.

During the fiscal year ended June 30, 2021, 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.

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 John Wright (the Symphony's Treasurer), Katherine Caldwell, Cynthia Duff, 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

Nothing like a global catastrophe to help you get your bearings, right? Here's what the Southwest Florida Symphony accomplished during the COVID-19 Season:

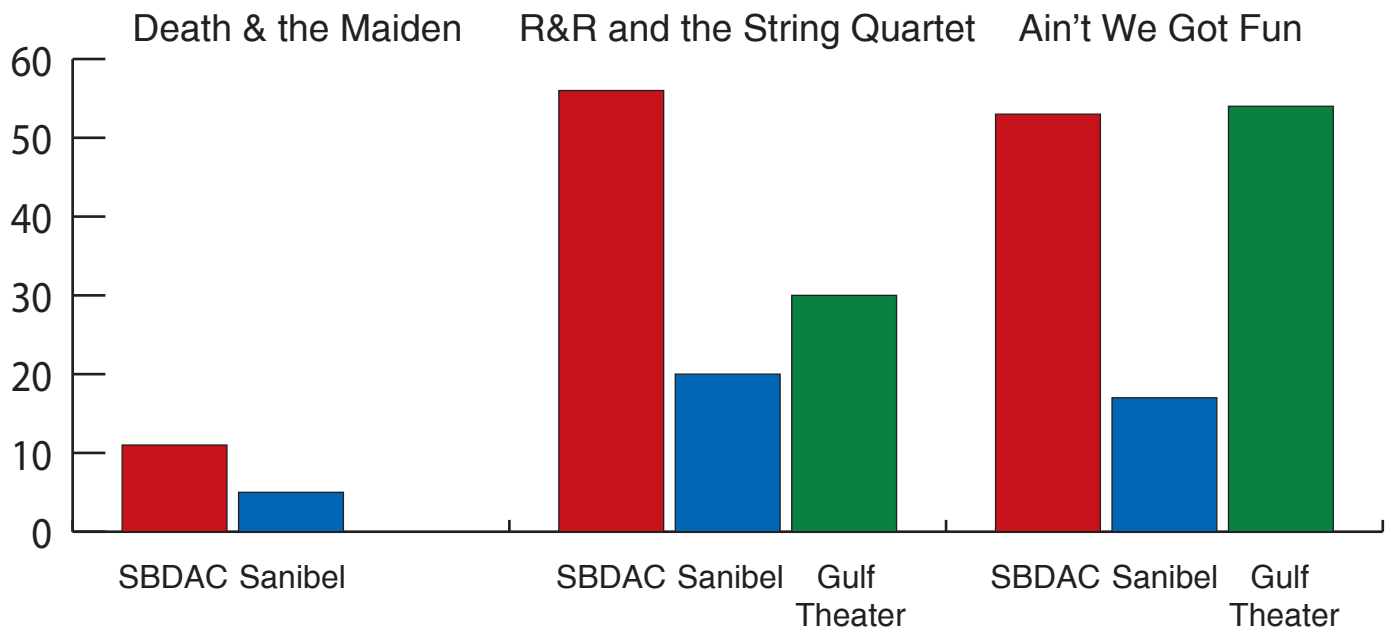
- Secured a beautiful new administrative office thanks to the generosity of Sanibel Captiva Community Bank
- Secured a performance/rehearsal/Youth Orchestra/large instrument storage/event space at a high-end, centrally located shopping center thanks to the generosity of the Bell Tower
- Secured a long-term loan of a baby grand piano thanks to the generosity of Isaac James at the Gulf Theater in Punta Gorda
- Safely and successfully held monthly performances at five venues throughout Lee and Charlotte Counties beginning in December of 2020
- Safely and successfully held two MainStage concerts at Barbara B. Mann Hall in spring of 2021
- Executed a successful Youth Orchestra program, including our first ever summer camp
- Grew the Endowment by nearly \$1MM
- Balanced the Symphony's budget (such as it was)
- Identified and hired highly qualified, productive staff that has been the most tightly knit, collectively supportive team I've experienced in the eight years I've had the privilege of serving this institution
- The Symphony Society exceeded its fundraising goal WITHOUT holding major events
- Built a new website
- Grew our board of trustees by four members
- Planned an exceptional 60th Anniversary Diamond Jubilee Season without a music director – A million thanks to Nora Lastre-Broughton for that!
- Jumped back on track with a Music Director search without missing a beat

We accomplished all of this because, even during the darkest hours of our 59 ½ season, you, our biggest fans, believed in us. Your unwavering support, board guidance and attendance at our concerts and events, enabled us to emerge healthy and strong from one of the most difficult times in human history. Thank you doesn't even scratch the surface.

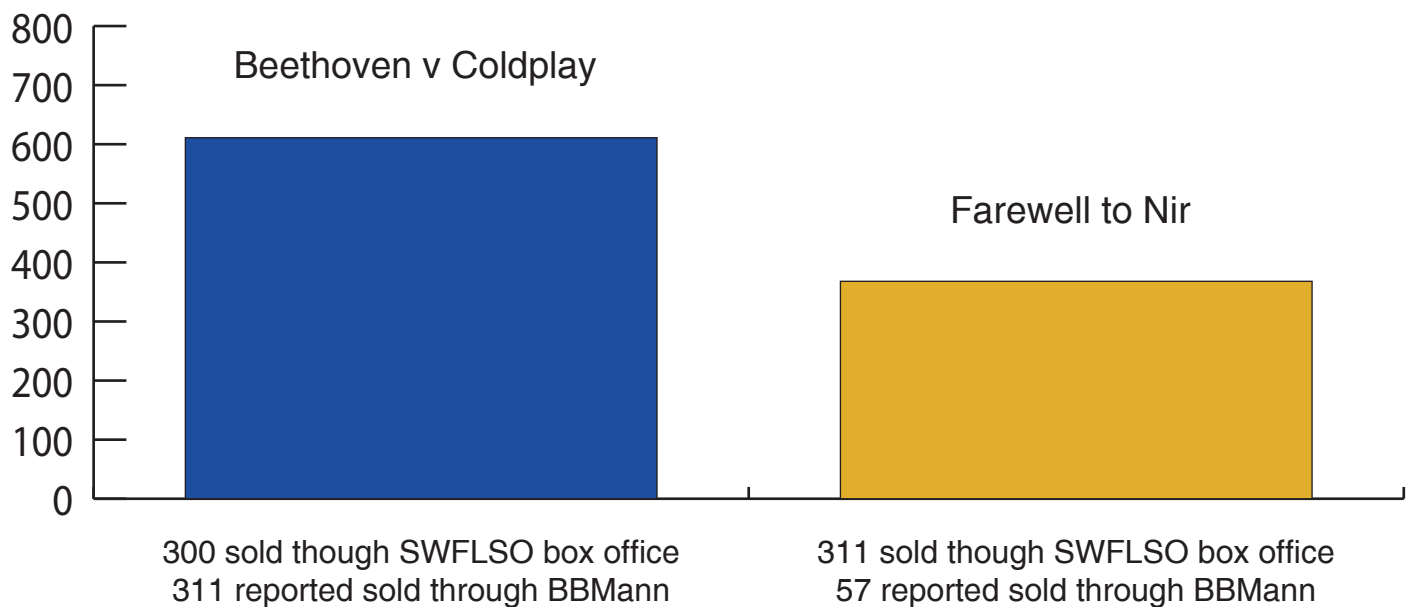
Happy Diamond Jubilee to us.

Here's to 60 more brilliant years of educating, enriching and engaging the world through live professional orchestral music.

TinyConcerts Ticket Sales



MainStage Ticket Sales (Sold at 50% capacity)





8290 College Parkway • Suite 103 • Fort Myers, FL 33919 • 239-418-1500 • WWW.SWFLSO.ORG

NEWS RELEASE

FOR IMMEDIATE RELEASE

Date: April 20, 2020

Contact: 239-418-0996

Media inquiries: Amy Ginsburg, Executive Director, aginsburg@swflso.org

("If you go" breakout box information and photo cutlines are listed at the end of this press release.)

Maestro Nir Kabaretti returns in spring 2021 to conduct farewell Southwest Florida Symphony Orchestra concerts

FORT MYERS, Fla. - Amy Ginsburg, executive director of the Southwest Florida Symphony, Lee County's only professional orchestra and the fourth oldest in the State of Florida, is pleased to announce that Maestro Nir Kabaretti will return in spring 2021 to guest conduct concerts as a proper farewell befitting his six years as the orchestra's music director.

"It's more than just a concert was canceled," Ginsburg said. "This was an abrupt end to his final year as music director, and the relationship between the Southwest Florida Symphony Orchestra and Maestro Kabaretti was cut short by a pandemic. That was not OK with anybody, so he figured out a way to adjust his schedule to make himself available to us so he could come back to say a proper goodbye."

As part of the orchestra's 60th season, Kabaretti will conduct the Pops 3 concerts in Charlotte and Lee counties on April 23 and 24, 2021, and the Masterworks 5 concert at the Barbara B. Mann Performing Arts Hall on May 1, 2021. The farewell party originally planned this spring to celebrate the end of Kabaretti's service as the orchestra's music director and primary conductor will take place when he returns to conduct these three concerts.

"I'm thrilled to still be performing in the area," Kabaretti said. "This community means a lot to me. I have a lot of friends and a lot of people that I will stay in touch with much beyond my tenure as music director. We all felt that we cannot let the corona virus situation disturb our plans, so luckily we were able to reschedule two dates next year, and I'm looking forward to that. It will close that chapter and open a new chapter at the same time for the symphony and for myself."

Kabaretti has a busy schedule lined up all over the world for the next few years, including a date to record in London as well as guest conductor stints in Italy at opera houses in Rome and Verona and a conducting commitment in Israel. Amid these globe-trotting plans, he found a way to make time to return to Southwest Florida.



8290 College Parkway • Suite 103 • Fort Myers, FL 33919 • 239-418-1500 • WWW.SWFLSO.ORG

"I would have hated the possibility that I was not allowed to do a nice farewell properly," Kabaretti said. "It's a musical thing, but it's much beyond that. We want to also ensure the future of the Southwest Florida Symphony and making the transition to the new music director the smoothest possible, so that's also part of it."

As well as celebrating its 60th anniversary, the Southwest Florida Symphony Orchestra will also be conducting a search for its new music director during the 2020-2021 season. Kabaretti spoke with hope about the future while musing upon the challenges the pandemic posed the symphonic community, where musicians and conductors often travel to work for multiple orchestras.

"As musicians, by nature for us, when we know we have a concert the process starts a few weeks before, and we practice until we come to that performance," Kabaretti said. "I'm really happy that we can think of this, a year from now, for this farewell. That's also some kind of a relief and hope for a lot of us."

Until the Southwest Florida Symphony is able to resume performances, Kabaretti said he encourages everyone to view the excerpts from past performances and other resources for music fans that are being posted on the symphony's social media accounts.

"We are planning to return next season, a little later than usual to make sure the coast is clear for all of us, but a season will happen and a music director search will happen," Ginsburg said. "And, we'll have the added benefit of saying goodbye to Maestro Kabaretti. This is way more than rescheduling a concert — this is the end of a music director's tenure."

Tickets for the Symphony's 60th season are available by calling the symphony box office at 239-418-1500 or visiting online at WWW.SWFLSO.ORG. Season subscriptions and single tickets to some individual concerts are currently on sale.

Maestro Nir Kabaretti Bio

Internationally acclaimed conductor Nir Kabaretti is in his sixth and final season as Music Director of the Southwest Florida Symphony during the 2019-2020 season and has been described as, "...a conductor with immense musicality and warm personality" by Maestro Zubin Mehta.

In 2018, Kabaretti started his tenure as Music Director of The Israel Sinfonietta Beer Sheva. He also continues as Music & Artistic Director of the Santa Barbara Symphony. Kabaretti has earned an impressive reputation across several continents for his command of a vast symphonic and operatic repertoire.

Upon graduation from the prestigious **University of Music and Performing Arts in Vienna**, Kabaretti began working as coach and Chorus Master at the **Vienna State Opera and the Salzburg Festival**. He later advanced to positions as Assistant to the Music Director at the Teatro Real in Madrid and Personal Assistant to Maestro **Zubin Mehta at Teatro del Maggio Musicale Fiorentino** in Florence, Italy.



8290 College Parkway • Suite 103 • Fort Myers, FL 33919 • 239-418-1500 • WWW.SWFLSO.ORG

Nir Kabaretti has worked with some of the world's most sought-after musicians, such as **Lang Lang, Plácido Domingo, Itzhak Perlman** and **Hélène Grimaud**.

His guest conducting appearances include the **Israel Philharmonic Orchestra, Orchestra del Maggio Musicale Fiorentino, Tokyo Philharmonic Orchestra, Orquesta Filarmonica de Buenos Aires, Orquestre National du Théâtre du Capitole de Toulouse, Orchestre de Chambre de Lausanne, Orchestra del Teatro dell'Opera di Roma, Orchestra del Teatro Petruzzelli di Bari, Orchestra del Teatro Carlo Felice di Genova, Orchestra Sinfonica Giuseppe Verdi di Milano, Rochester Philharmonic Orchestra, Jerusalem Symphony Orchestra, Israel Chamber Orchestra, Haifa Symphony Orchestra, Vienna Chamber Orchestra, La Orquesta Sinfonica de Madrid, Real Orquesta Sinfónica de Sevilla, La Orquesta Filarmonica de Gran Canaria and the Bochumer Symphoniker**. He was appointed Principal Conductor of the **Raanana Symphonette Orchestra** in Israel in 2002, and later, its Music Director until 2008.

Kabaretti's operatic experience includes productions at the **Maggio Musicale Fiorentino, Teatro Real** in Madrid, **The Israeli Opera, Opéra de Lausanne, Avenches Opera Festival** in Switzerland, **Tokyo New National Theatre** and **Opera Santa Barbara**.

He conducted *The Diary of Anne Frank*, a guest production of the **Vienna State Opera** performed at both the Bregenz Festival and Expo 2000 in Hanover. In 2005, Kabaretti led **Teatro San Carlo di Napoli** on its first tour to Japan, conducting *Il Trovatore*, both in Kyoto and Tokyo.

During the 2004-05 season, he made his debut at **Teatro alla Scala di Milano**. In 2007, he was invited back for the ballet production of Mendelssohn's *A Midsummer Night's Dream* (broadcast by Italian television RAI and released as a commercial DVD).

Maestro Kabaretti received the **America-Israel Cultural Foundation** Grant for Young Conductors. In 1993, he won **the Forum Junger Künstler Conducting Competition** in Vienna. In 1994, he was among the finalists in the International Competition for Conductors in Douai, France.

Upcoming engagements as guest conductor include a debut with the Bogotà Philharmonic Orchestra, a tour in Belgium with the Orchestre Philharmonique Royal de Liège and a return to the Opera di Roma.

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

Southwest Florida Symphony General Information

The Southwest Florida Symphony's 59th year saw the orchestra's tradition of artistic excellence continue through early March as internationally acclaimed Maestro Nir Kabaretti led the Symphony through his final season as music director. Maestro Kabaretti was the fifth music director in the organization's history. He led critically acclaimed performances during his tenure with the Southwest Florida Symphony.



8290 College Parkway • Suite 103 • Fort Myers, FL 33919 • 239-418-1500 • WWW.SWFLSO.ORG

The symphony now looks forward to its 60th anniversary diamond jubilee season, which will begin in January 2021. The season will see five Masterworks and three Pops series programs performed. Guest conductors will conduct the concerts while the symphony performs its search to hire its sixth musical director of its 60 years.

The Southwest Florida Symphony is the only professional symphony orchestra in Lee County and one of the oldest on Florida's Gulf Coast. Founded by conductor Arlo Deibler, the Symphony made its debut as a community orchestra on April 15, 1961, with a roster of 24 musicians who performed in community centers and schools throughout Lee and Collier counties. It has since grown to become Lee County's premiere symphonic ensemble, with a roster of 70 world class musicians playing to packed houses at Barbara B. Mann Performing Arts Hall. The Southwest Florida Symphony's mission is to celebrate the joy of music and to inspire audiences with a variety of professional-quality concerts that are accessible to all.

The Symphony's 2020-2021 season features exciting concerts in its signature Masterworks and Pops series.

The Masterworks Classical Concert Series is performed at Barbara B. Mann Performing Arts Hall at Florida SouthWestern State College in Fort Myers and includes the following dates: January 23, February 13, March 13, April 17 and May 1, 2021.

The Pops Concert Series, also performed at Barbara B. Mann, takes its opening concert to Charlotte Performing Arts Center as well. Dates include January 29 and 30; February 20 (Fort Myers only); and April 23 and 24, 2021.

Further details on all of these concerts can be found at www.swflso.org

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.

#####



8290 College Parkway • Suite 103 • Fort Myers, FL 33919 • 239-418-1500 • WWW.SWFLSO.ORG

If you go:

Event: Tickets for Southwest Florida Symphony Orchestra's 60th season.
Tickets: May currently be purchased by calling 239-418-1500 or visiting www.swflso.org.
Dates: Concerts are scheduled from Jan. 23 to May 1, 2021, at venues in Lee and Charlotte counties.
Social Media: www.facebook.com/southwestfloridasymphony
www.twitter.com/swflsymphony
www.instagram.com/southwestfloridasymphony

Photo Cutlines:

Nir Kabaretti 1 MB.jpg

Maestro Nir Kabaretti returns to guest conduct the Southwest Florida Symphony Orchestra for its Pops 3 concerts on April 23 and 24, 2021, at venues in Charlotte and Lee counties.

Photo courtesy of Southwest Florida Symphony Orchestra

Nir Kabaretti 650 KB.jpg

Maestro Nir Kabaretti returns to guest conduct the Southwest Florida Symphony Orchestra for its Masterworks 5 concert on May 1, 2021, at the Barbara B. Mann Performing Arts Hall in Fort Myers.

Photo courtesy of Southwest Florida Symphony Orchestra

SWFL Symphony Society
ANNUAL REPORT
July 1, 2020 — June 30, 2021

This 50th Anniversary Year of the Symphony Society was muted instead of celebratory. As with the rest of the world, the Society had to abruptly cancel most of its scheduled calendar of events, including luncheons, fundraisers and smaller gatherings from mid-March, 2020, through April, 2021. With meeting venues closed and participation curtailed by social distancing requirements, we could not launch the vigorous program of past years. To sustain our organization, board members became familiar with Zoom meetings. Our monthly newsletter, News of Note, continued to be published, thanks to editor Barb Coons.

We planned and launched our non-event fundraisers in good faith, and the response of loyal Symphony Orchestra supporters was gratifying. Our July-August Key Signatures Campaign, chaired by Liz Marnul, realized a record \$17,150. This was the highest amount received in recent years of this campaign. Following that, the “Santa’s Magical Sleigh Ride” effort, again a mail-only campaign, replaced our usual holiday house or fall event fundraisers. Chaired by Sandy Magyar, this effort yielded \$6,175 in donations. This total of over \$33,000 to support the Symphony Orchestra, in a year of no meetings and no major concert activity, is quite an accomplishment.

“Treats,” our smaller group activities held at unique locations and private homes, usually bring in over \$10,000 for the Symphony. Unfortunately, most of these were cancelled over the year due to COVID restrictions, but those that were held still realized a net of about \$5,000 for the Symphony.

The Society facilitated the John Hudson Scholarship for an outstanding Youth Orchestra musician in May, 2021. The Society Scholarship, Jillian Prescott Scholarship, and the Marilyn Van Sickle Voice Competition auditions were not held this year because our usual venues were not open to outsiders, nor were many of our usual large contingent of support staff, judges, etc. willing to participate during the height of the pandemic. We fully expect to launch our full scholarship program events this coming year.

The Society’s 2020-2021 program year was able to be concluded with a festive luncheon in April, 2021, at The Forest Country Club. As our one and only luncheon meeting of the year, it was gratifying to be able to finally meet each other face to face (while still wearing masks) and to highlight our members for their significant accomplishments.

Most of our officers from the 2020-2021 year committed to serving another term. We look forward to a vibrant and creative program to support the SWFL Symphony Orchestra.

Ellen Schneider, President
Janet Hladik, First Vice President
Stacia Featherston, Second Vice President
Joanne Hostetter, Treasurer

Barbra Blaharski, Assistant Treasurer
Richard Quodomine, Secretary
June Gibson, Corresponding Secretary

Respectfully submitted,
Ellen Schneider, Symphony Society President 2020-2022

ANNUAL REPORT

October 20, 2021

Education & Community Outreach Report for 2020-21 (Season 59¹/₂)

Kara Griffith, Director of Education & Community Outreach

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 spring 2020, but all were cancelled.

Due to the continuing pandemic, no outside visitors were allowed into schools for spring 2021, so therefore, no Majors for Minors presentations were permitted.

Historically, Sanibel Captiva Kiwanis, Fort Myers Rotary, Fort Myers Rotary South, Cape Coral Community Foundation and other local service organizations have sponsored a few of these, along with our Sustaining Partners.

Goals

- Acquire more Sustaining Partners to fund more schools
- Increase local grant monies
- Increase the number of viable ensembles available to send to schools

YOUNG PEOPLE'S CONCERTS:

These concerts are presented annually to Lee County students. For our spring 2020 YPC, I was excited to partner with Carnegie Hall's Link Up program, which also had to be cancelled due to the pandemic. Also due to ongoing school visitor and travel restrictions, no YPC was able to be confirmed for the 2020-21 season. I am excited at the potential Dan Brown *Wild Symphony* performance opportunity upcoming in February, 2022.

Goals

- Attain a regular yearly schedule
- Maximize number of students attending (including possibly two seatings)
- Obtain enough grants and donations for this concert to be completely and independently self-sustaining



YOUTH ORCHESTRA & SINFONIETTA:



This program provides young musicians the opportunity to perform in the Sinfonietta or Youth Orchestra and a few in the smaller Ensembles. After a delayed start due to safety precautions, we ended up with a wonderful season! We held two of our concerts outdoors in the Bell Tower courtyard, with a final concert at First Assembly of God's beautiful sanctuary (left).

One of the courtyard concerts also concluded with a delightful Music Bingo Fundraiser Dinner (from Burntwood Tavern) under the stars, and another concert featured a raffle ticket basket fundraiser. Between tuitions, scholarship donations, and fundraisers, despite the numerous roadblocks created by the pandemic, the Youth Orchestra program finished the year with an \$8300 gain.

B I N G O				
Youth	Orchestra &	Sinfonietta	Fund	Raiser
Sunday	2/	28	Concert	Dinner & BINGO
Table for 4	\$120		4 O'Clock	5 O'Clock
BELL TOWER	Outdoor Courtyard	Cash Bar	RSVP by	2/21
Food	Provided by 	to buy tickets swfso.org		

Goals

- Resume all activities (when safe), including regular coachings and honor ensembles
- Continue to increase membership (50+)
- Increase community presence and appreciation
- Build quality through consistency
- Increase fundraising to meet and cover significant budget needs

DISCOVERY CLUB:

This offers the opportunity for students K-12, for a one-time fee of \$25 (increased from \$15), to attend 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 for 2020-21 stagnated due to the pandemic and our limited opportunities to gather. Happily, we were able to offer ONE Discovery Club event at our Beethoven VS Coldplay return to the Barbara B. Mann stage. I handed out batons and pre-autographed photos to 10 grateful students (plus parents), who were able to meet Maestro



Steve Hackman, enjoy his brief conducting lesson/demo (right), and enjoy the evening's soloists harmonizing in a little pre-concert sneak peek!

Goals

- Recruit through other means (social media, recommendation, in person, school visits)
- increase participation in the events offered; eight are scheduled for 2021-22.

SOUND LAB:



The SWFLSO offers a travelling set of hands-on string, brass, and woodwind instruments to be taken to and shared with the public through invitations to fairs, art shows, markets, etc. After a successful 2019 appearance, the 2020 WGCU *"Be My Neighbor Day"* at FGCU was also cancelled. With the wonderful availability of our Bell Tower location, and our participation in Artsemble Underground's Battle of the Arts, we have been able to carefully and safely resume Sound Lab connections, even recruiting volunteers from the Youth Orchestra (left).

Goals

- Increase frequency
- Increase crowd size, when safe

SOCIAL MEDIA & DIGITAL COMMUNICATION:

Emer Olivarez has been doing a wonderful job capturing and sharing the energy and enthusiasm for our ED & CO programs, and promoting all upcoming events and deadlines.

Goals:

- Increase followers, especially all Discovery Club and Youth Orchestra members, and school music instructors
- Increase interaction on each post





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. Unfortunately, there was no opportunity to schedule Masterclasses during the 20-21 season, but thanks to our Coaching sponsor, I was able to offer 9 sectionals to our Youth Orchestra members this past season, using 5 SWFLSO members to instruct (Scott Ellington, left).

Goal:

- Reinstatement of some of these wonderful education and connection opportunities between the SWFLSO and the music community. I have inserted three “free” Mondays into the YO schedule for this purpose in 21-22.

STUDENT RUSH:

In past seasons, 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. There were no Student Rush sales in 2020-21, but we will resume these going forward.

Goal

- increase the number of Student Rush guests through more active and ongoing advertising, after gathering is deemed safe.

MUSIC FOR LIFE:

This is a partnership with other community non-profit organizations (such as Big Brothers Big Sisters, Goodwill, and PACE Center for Girls) 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, which will resume in 2021-22, when safe.

Goal:

- Continue to promote and encourage greater participation and new partners in the upcoming season.

SUMMER ORCHESTRA CAMP:

Along with moving into our new Sanibel Captiva Bank building offices, and acquiring our versatile Bell Tower space, launching our first Summer Orchestra Camp was one of the highlights of a very trying season. Recruitment was still difficult due to the pandemic, but the combination of enthusiastic and talented students, inspiring guest instructors, committed staff conductors, great music, and a perfect location, the result was an unforgettable beginning upon which to build! With several generous sponsors and partners, our first camp successfully raised \$3100.

Goals:

- Increase attendance number
- Increase length to two weeks
- Research other locations (Alva house; Crowne Plaza) for possible sleep-over options



SCHOLARSHIPS:

The Education department receives numerous scholarships from various donors. During our 20-21 season, we were able to award 8 Youth Orchestra members with full (\$250) or half (\$125) tuition scholarships. I helped administer the \$1000 John Hudson Scholarship (through the Society) for a graduating senior, and awarded 11 \$250 scholarships to Summer Orchestra Camp attendees.

Goal:

- Increase amount of scholarships received. There is always a need, especially since Youth Orchestra tuition should be raised soon

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.” The 11- member Education Committee was updated monthly with activity and result summaries instead of meeting in person. I am very grateful to the committee, the parents & students, sponsors & business partners, the conductors, the staff and all of 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 community. 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.

Ambassador Club Diamond Baton

\$30,000+

Ellie Fox
L.A.T. Foundation
Estate of Don & Joan Calder
Uhler & Vertich Financial Planners, LLC
Southwest Florida Symphony Endowment Fnd
Southwest Florida Symphony Society
Sanibel Captiva Community Bank

Emerald Baton

\$10,000-\$29,999

Jane King in memory of Donald J. King
Dean Barry
Rob Diefenbach,
 in memory of Ruth Diefenbach
Liz Erikson Marnul

Ruby Baton

\$7,500-\$9,999

Katherine Caldwell, In Memory of Jerry Havill
Carolyn H. Wilson
Alexandra and Eunice Bremner
Anne Wardlow

Sapphire Baton

\$5,000-\$7,499

Cape Coral Community Foundation
City of Fort Myers
David and Gail Hall
Waukesha Cnty Comm. Fdn.
 William & Michele Holcomb
Friedrich and Daniela Jaeger & TOTI Media
Radiology Regional; Dr. & Mrs. Randolph Knific
Sanibel Captiva Community Bank
Bunny and Joel Ospa
Donna Starkweather; in memory of
 Dorothy & Charles

Gold Baton

\$2,000-\$4,999

Mrs. Rachel Abraham
Mr. & Mrs. Philip Beavers
Kenneth and Carol Boyd
Jane E. de Lisser
John and Esther Dick
Cynthia Duff, CopyLady
Ernie Fogg; Sr. & Margot Flinn
John Fredericks, in memory of Jane
Anonymous
Lowell Hart
Anne Kimball,
 in memory of Richard A. Kimball

Donors from July 1, 2020 – June 30, 2021

Jack Martin

Eugene Holt Massey, Gene's Books

Frank and Sue Matthews

Albert McCann

Gary David Niethamer and Sue Purcell

Sue Ann Pirsch

Bradford Prokop

K. A. Ringbakk

Robert and Reina Schlager

Paul and Sylvia Simko

Scanlon Lexus

Roy and Karen Wildeman

Sara Zak

Gwenda Hiatt-Clements

Leonard J. and Susan Howell

Mary Daley Jacobs

Cape Coral Kiwanis Foundation

Southwest Florida Community Foundation

Dr. and Mrs. Marc and Margie Parise

Martha Reiter

Harry Shaffer

Patricia Short

David and Patricia Thompson

Ernie and Julie Toplis

Rosalind and Wilson Wheeler

Robert Wolf

Robert Wolfe

Ovation

\$500-\$1,999

Alan & Diana Anick

Edmund & Joslyn Becker

Nancy Campbell

Tom and Nancy Crumrine

Jeff Cull and Ella Naylor

Mary Davidson,

in memory of Dorothy Mae Bunck

Patricia Davis

Richard and Iris DeBastiani

Mr. and Mrs. John E. Dick

Robert and Jeanne Fuchs

Amy Ginsburg

Mary and Joseph Gormley

Marianne Heath

Bravo

\$250-\$499

Darlynda 'dj' Arnold

Larry and Roberta Atkinson

Hugh & Eva Barbour

Greater Milwaukee Foundation

Paul and Irene Bellfy

Fort Myers Woman's

Community Club

Rita Buzzard

Steve and Doris Colgate

Christopher & Mary Jane

Cosden

Jim and Sue Duval Charitable

Fund

Donors from July 1, 2020 – June 30, 2021

Barbara J. Hambleton
Howard & Marilee Hanson
Kathy Kuzminski
Rev. Gary and Christine LaCroix
Lise & Marc Laviolette
Anne Loffredo
Alan and Carla Mandel
Joan I. May
Audrey Murphy
Anthony & Helen Palermo
Richard Prescott
Mary Ann Redman
Fred Remyn
John and Nancy Rohde
Ruth G. Segel
Jeremiah and Lorna Shafir
Arie & Jacqueline Van Duijn
Remembering Sonia Wagner
Richard P Waterhouse
Kathleen Watts
Robert H. and Diane R. Williams
Dr. Rosemary Wittstadt

Applause

\$100-\$249

Solomon and Arline Agin
Joan M. Anderson
Stasia Arcarese
Dr. Ron Arceneaux
Megan Atha-Just

Hilda Avedikian
Dolores Bagish
Marilyn Burch
Larry and Mary Lou Chamberlain
Karen Clayton
Frances Clement
Barb Coons
Susan Crawford
Lee and Mari DeMeester
Dr. and Mrs. Richard Devlin
Carol Edmier; in memory of Jim Edmier
Mary Ann Ferrarese
Charles & Betty Finkbeiner
Sigrid Franz
Sally L. Gore
Mr. and Mrs. Scott Gregory
Brad and Christina Grochowski
Nona, in celebration of Mr & Mrs Gronau's lives
Mr. & Mrs. Grosse
Avard Law Offices; P.A.
Charlene Hoover
Gaja and Nir Kabaretti
Ron Kemper
Dick and Linda Knight
Julian Korn
Lois H. Kress
James Lavelle
Claus & Sue Mahler
Margaret McClearn, in memory of Dorothy Mae
Bunck
Joanne McLaughlin

Donors from July 1, 2020 – June 30, 2021

Gregg Miller

Sandy Montclare

Tom Mortenson & Mary Ellen Becker

Lynn Myrick

Gail C. Newmark

John & Nancy Petralia

Kathy Pluhar

Peter and Christine Rasmussen

James Ream

John & Karen Riley

Carol S. Robinson

Harry and Carol Robinson

Mary Robinson & Richard Lenholt

Ava Roeder

John Rohde

Carol Roscher

Susan Rosenberg and Kenneth Gerson

Charles & Brenda Sammis

MaryAnn Sedlock and Russell J. Kraay

Art Sherrill

Ed and Joan Stickles

Lisa and Allen Tafel

Pamela Templeton

Michael & Monica Thomas

Jessica Trippler

Garrett Van Siclen

John Walczyk

Barbara Wallingford

Gerri Westlund

Phil and Tina Weyman

Jay Wright

OUR GENEROUS SPONSORS

SEASON SPONSORS



THE L.A.T. FOUNDATION



CORPORATE PARTNERS



MAJOR SUPPORTERS

Jane King
Liz Marnul
Rob Diefenbach
Dean Barry
Jeff Cull & Ella Naylor
Estate of Don & Joan Calder
Eric Diefenbach & JK Brown
Dr. Randall & Mrs. Karen Knific
Gary & Sue Niethamer

Anne Wardlow
Katherine Caldwell
Joel & Bunny Ospa
Carolyn H. Wilson
Alexandra & Eunice Bremner
Tom & Linda Uhler
William & Michele Holcomb
David & Gail Hall
Corey Vertich