

An impressionistic painting of a conductor and two violinists. The conductor, in the center, is seen from behind, wearing a dark suit and a bright yellow topknot. He holds a baton in his right hand and a music book in his left. To his left and right, two violinists are playing their instruments. They are wearing dark jackets with red accents. The background is a mix of dark and light tones, suggesting a stage or concert hall. The overall style is expressive and textured, with visible brushstrokes. The name "RIZZA" is visible in the bottom right corner of the painting.

Annual Report 2023-24



Annual Meeting
October 22, 2024

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Annual Meeting
October 22, 2024
4:30pm - 5:00pm
Sanibel Captiva Community Bank

Agenda

Welcome and Call to Order	Tom Uhler
Approval of 2022 Annual Meeting Minutes	Tom Uhler
Financial Report	Dylan Zsebe
Endowment Foundation Report	Corey Vertich
Chief Executive Officer's Report	Amy Ginsburg
Interim Artistic Advisor Report	Stilian Kirov
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.



Holiday Pops @ Babcock Ranch with Heather Ivy



Beethoven & British Invasion with Charles Yang



YPC @ FMSHS with Nathaniel Efthimiou



Beethoven Concerto with Concertmaster Orin Laursen



Cryptic Symphony with Sterling Elliott



70s, 80s & 90s Unplugged with Andrew Lipke

Call it the Year of Innovation

Our 63rd season incorporated the best of the classics gloriously merged with the best of contemporary music.

And the stars came out: Marcus Roberts, REM, Beethoven's Fifth, the historic British Invasion, and more. We watched and listened as Darkness turned to Light, heard our own concertmaster strut his stuff, and were entertained by the Cryptic Symphony. A little something for everyone, but all very entertaining and professional.

We hoped to surprise you with some programming, hoping that you'd show up wondering if you'd like it... and you DID!

There's no space to thank every musician, our dedicated staff, and all of you who made contributions of leadership, wisdom, and money to keep the music alive, but you know who you are. Thank you!

Tom Uhler



Southwest Florida Symphony
Annual Meeting Minutes
Coconut Point Rehearsal Suite
Estero, Fl
Tuesday, October 17, 2023

Present: President – Tom Uhler, Trustees: Jeff Cull, Gary Niethamer, Robert Short, Jack Martin, and Rachel Kaduk

Also Present: Amy Ginsburg, Chief Executive Officer, Dylan Zsebe, Finance Director Contractor, Radu Paponiu, Music Director and Corey Vertich, President of the Endowment Foundation, and members of the orchestra/artistic staff, Southwest Florida Symphony Administrative Staff and general public also attended.

President Uhler called the meeting to order at 5:02 PM.

APPROVAL OF MINUTES

Jack Martin moved that the Minutes of the October 25, 2022, Annual Meeting be accepted as presented. Bob Short seconded the motion. The Minutes were adopted as presented.

FINANCE REPORT

Our Finance Director Contractor, Dylan Zsebe CPA, helped us to understand the Financial Report that was provided in the annual review which gave us a three-year financial comparison.

REPORT OF THE ENDOWMENT

Corey Vertich, President of the Endowment Foundation, provided summary comments in connection to the June 2023 Annual Report. It was noted that the Southwest Florida Symphony Endowment Foundation ended fiscal year 2023 with a market value of \$3,156,474, which was \$258,289 more than \$2,898,185 a year ago. The General Fund (unrestricted) totaled \$2,984,636 and the Van Sickle Fund was \$171,838. The General Fund included \$24,346 for the John Hudson Fund. The total known estate commitments are approximately \$4 million to \$4.5 million.

REPORT OF THE CEO

We have an orchestra that is overflowing with bright new talent consisting of conservatory graduates from throughout the state. Some from around the country. Turnout for our auditions to fill vacancies were better attended during our 62nd season than ever. It's undisputable that our administrative team is the most effective, dedicated group we've had in decades. As magical as our orchestra is, the people who show up to our office (and our new Coconut Point home) every day are the tireless, talented, wonderful people who facilitate the magic that happens onstage at each concert. Our board is invested in all the work we do, providing whatever support and assistance is within their power to give. The Endowment Foundation has provided exceptional stewardship of the significant gifts we received during FY23,

investing them on the orchestra's behalf. In turn, they have taken great care of our institution when the need arises.

Amy publicly thanked her staff for their tireless work in putting together a great season and managing the 2022-2023 budget.

CLOSING COMMENTS BY THE BOARD CHAIR

Coming off the Pandemic and the difficulties that created for everyone, but especially the live performance world, Hurricane Ian brought a new perspective on life. For many of us, the world was turned upside-down, losing homes, businesses and possessions. But your symphony made the best of a bad situation and continued performing and reaching out to our constituents.

Still, we're glad that much of that is behind us and we look forward to our 63rd season with anticipation and even excitement.

He also thanked our staff, the members of the orchestra, the Board of Trustees, volunteers, patrons, and community for helping us to bring World Class Symphonic Music to Southwest Florida.

The meeting was closed at 5:51 PM.

Submitted by Jeff Cull

Fiscal Year End Financial Report
Southwest Florida Symphony Orchestra & Chorus Association, Inc.
Statement of Financial Position Summary

Assets	2024	2023	2022
Checking/Savings	\$ 136,876.28	\$ 155,352.52	\$ 145,078.39
Fixed Assets	\$ 8,878.74	\$ 10,566.00	\$ 10,566.00
Accounts Receivable	\$ 38,500.00	\$ 6,000.00	\$ 66,014.35
Other Assets	\$ 21,193.75	\$ 31,193.75	\$ 21,279.00
Total Assets	\$ 205,448.77	\$ 203,112.27	\$ 242,937.74

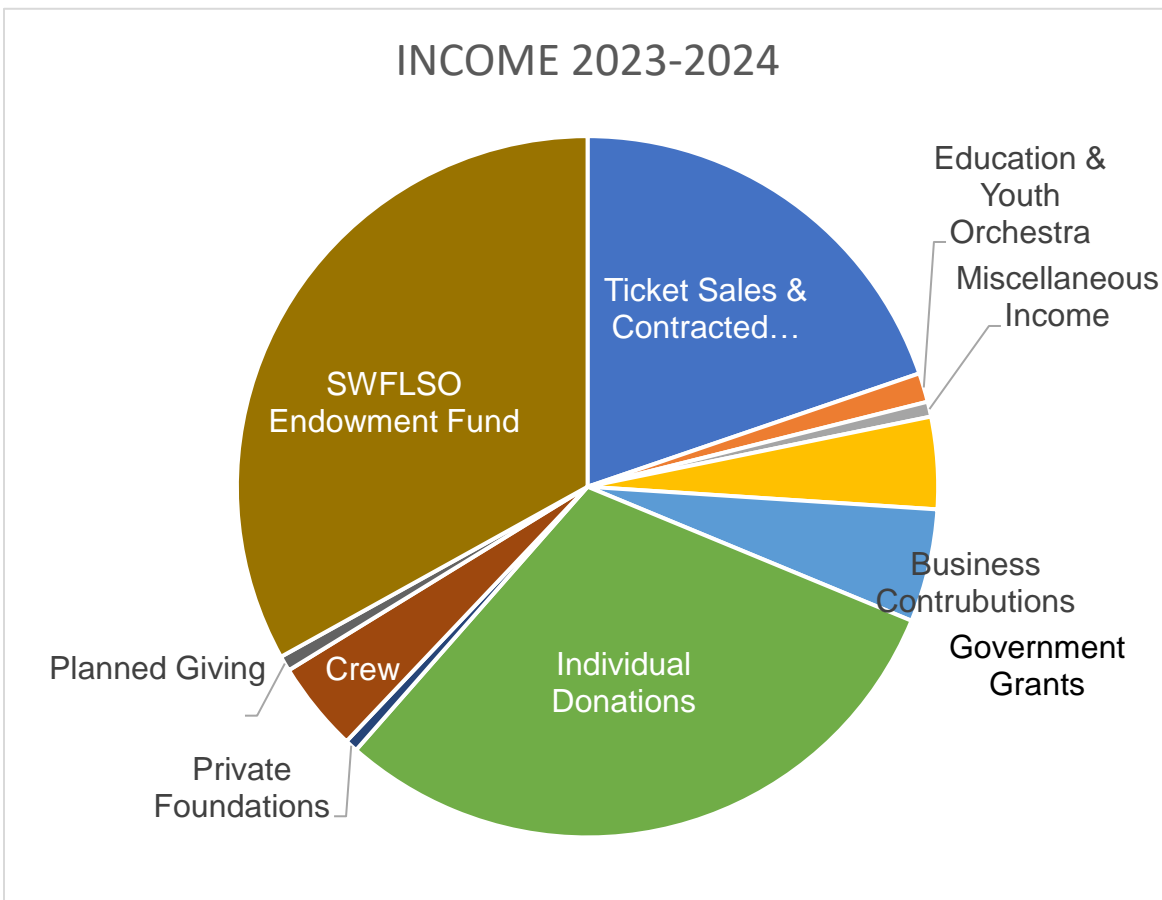
Liabilities & Equity

Liabilities			
Accounts Payable	\$ 8,562.20	\$ 22,440.38	\$ 38,225.79
Current Liabilities	\$ 204,990.18	\$ 6,894.47	\$ 7,994.55
Deferred Program Revenue	\$ 54,404.38	\$ 59,422.00	\$ 65,100.56
Notes Payable	\$ 101,761.05	\$ 104,677.40	\$ 122,221.64
Equity	\$ (164,269.04)	\$ 9,678.02	\$ 9,395.20
Total Liabilities & Equity	\$ 205,448.77	\$ 203,112.27	\$ 242,937.74
	Unaudited	Unaudited	Audited

We have transitioned to Wiltshire, Whitney, Richardson & English for our 990s and audits. Our FY23 and FY24 audits are in process, being completed simultaneously.

ACTUAL INCOME 2023-2024

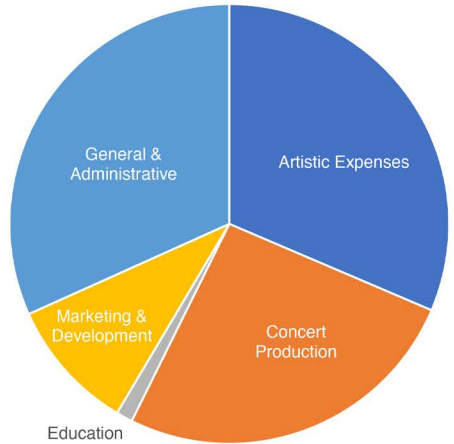
Categories	Income	
Ticket Sales & Contracted Services	278,669.90	20%
Education & Youth Orchestra	18,890.95	1%
Miscellaneous Earned Income	9,751.18	1%
Government Grants	59,768.00	4%
Business Contributions	73,506.00	5%
Individual Donations	426,400.05	30%
Foundations	8,300.87	1%
Society/Crew	58,735.48	4%
Planned Giving	10,000.00	1%
SWFLSO Endow Fund	466,204.13	33%
Local Grants	19,862.50	1%
Endowment Salary Support	41,250.00	3%
Total Income	<u>1,471,339.06</u>	100%



Endowment income also reflects major gifts to the Symphony that were deposited into the Endowment and returned to the Symphony over the course of three years.

ACTUAL EXPENSES 2023-2024

Categories	Amount	
Artistic Expenses	516,035.03	31%
Concert Production	425,236.93	26%
Education	19,969.00	1%
Marketing & Development	160,056.97	10%
General & Administrative	<u>521,005.19</u>	32%



Total Expense 1,642,303.12 100%

FISCAL YEAR 2024 CONCERT PROFITABILITY

2024

Concert	Date	Budgeted Sales	Actual Sales	% of Goal
Holiday Pops (Total)	12/9-12/11/23	\$ 42,120.00	\$ 48,048.96	114%
Beethoven 5 & British Invasion	1/6/24	\$ 39,000.00	\$ 41,164.70	105.50%
From Darkness to Light/Alexandra Carlson	2/3/24	\$ 33,800.00	\$ 26,761.90	79%
American Classical/Marcus Roberts	11/4/23	\$ 42,250.00	\$ 31,502.00	76%
Concertmaster Concerto/Orin	3/16/24	\$ 33,800.00	\$ 25,184.30	74.50%
Cryptic Symphony/Sterling Elliott	4/13/24	\$ 33,800.00	\$ 20,805.40	61%
REM Explored	10/21/23	\$ 75,000.00	\$ 39,342.70	53%
Unplugged/Andrew Lipke	5/18/24	\$ 50,625.00	\$ 31,687.40	63%
		\$ 350,395.00	\$ 264,497.36	76%

Concert sponsorship remains flat, while chair sponsorship and CCC membership have grown.

FY23, 42.5% more was raised through individual giving than was budgeted

FY24 to date, 51% more was raised through individual giving than was budgeted

2023

Concert	Date	Budgeted Sales	Actual Sales	% of Goal
Ying Li, Piano	4/22/23	\$ 30,000.00	\$ 28,016.90	93%
ELO	5/6-5/7/23	\$ 50,000.00	\$ 44,611.24	89%
Elton John	1/20-1/21//23	\$ 40,500.00	\$ 35,787.39	88%
Tommy Mesa	3/11/23	\$ 30,000.00	\$ 25,996.85	87%
Night at the Opera	4/1/23	\$ 34,000.00	\$ 26,402.08	78%
Gil Shaham	1/28/23	\$ 45,000.00	\$ 30,471.40	68%
Holiday Pops	12/11-12/13/23	\$ 53,500.00	\$ 27,283.28	51%
Bowie & Glass	2/12/23	\$ 34,000.00	\$ 15,570.69	46%
		\$ 317,000.00	\$ 234,139.83	73%

This was the HURRICANE IAN YEAR.



**Southwest Florida Symphony
Endowment Foundation**
7500 College Parkway, Suite 200
Fort Myers, Florida 33907
239-274-6277
ECastro@sancapbank.com

**Annual Report
June 30, 2024**

The Southwest Florida Symphony Endowment Foundation ended fiscal year 2024 with a market value of \$2,799,528, which was \$356,645 less than \$3,156,173 a year ago. The General Fund (unrestricted) totaled \$2,619,528 and the Van Sickle Fund was \$180,000. The General Fund included \$25,647 for the John Hudson Fund.

The total known estate commitments are approximately \$4 million to \$4.5 million.

During the year ended June 30, 2024, the Endowment Foundation had the following cash flow:

Total Assets as of June 30, 2023	\$3,156,474
Grants Paid to the Symphony	(601,204)
Grants Paid by the Van Sickle Fund	(9,000)
Grant Paid by the Hudson Fund	(1,000)
Operating Expenses (including FY 2024 \$45,000 and FY 2025 \$55,000 for marketing reimbursement)	(113,450)
Donations Received	7,942
Investment Results:	
Interest, Dividends	45,923
Realized Net Gains due to repositioning portfolio	130,171
Unrealized Net Increases in Investment Values	<u>183,973</u> <u>360,066</u>

Total Assets as of June 30, 2024 \$2,799,828

During the last fiscal year, the Endowment Foundation made grants to the Symphony of \$601,204. This was more than the 4% to 5% range that the Endowment Foundation set as a target grant amount. During the current fiscal year ending June 30, 2024, the Endowment Foundation committed to granting \$145,000, or 5.00% of the average balance in the general fund during the prior fiscal year. The amount of the grant was determined using average assets during the past 15 months of \$2,902,666. This was paid to the Symphony in May 2024 due to the Orchestra's timing bind and need for cash infusion caused by the conductor's departure.

During the fiscal year ended June 30, 2024, the Van Sickle Fund made \$9,000 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. Corey Vertich is our elected President and Chairman of our Investment Committee. Thomas Kracmer is Vice President. Cynthia Duff is Secretary. Edwardo Castro is now Treasurer. Also on the Board are John Martin (the Symphony's Treasurer), John Wright, Katherine Caldwell, Gina Sabiston, and Roz Lesser.

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 Corey Vertich at 239-848-5411.

Here's to a year of only the BEST SURPRISES!

In keeping with Southwest Florida Symphony fashion, last year was, once again, full of surprises. There's no sense sugarcoating or veiling them because we all lived through (and learned a great deal from) navigating a season-long labor dispute and the unexpected departure of a polarizing Music Director. We also all learned how much programming, and how that programming is marketed, matters in our community. The common adage that applies to how we approach these challenges in the future comes from one of the greatest minds in human history, Albert Einstein.

***"The definition of insanity is doing the same thing over and over
And expecting different results."***

We are taking a radically different approach in 2024-2025 to programming, fundraising, and contract negotiations when the time comes to sit at the bargaining table again. At the end of our 2023-2024 season, we achieved a ratified Collective Bargaining Agreement. Once we identified artistic leadership for the coming season, we worked together to craft an ambitious concert schedule that no longer features Masterworks and Pops Concerts, removing the mystery of orchestral performances for the broader community. We have programmed both popular and classical repertoire on virtually every concert. This is thanks to the creative collaboration of our new Interim Artistic Advisor, Stilian Kirov. We've formulated an aggressive development campaign calendar, which will fill some of the void left by the Florida Division of Cultural Affairs line-item veto in the State budget for arts and culture funding and will also help inform our staff on what really matters to our constituents through the campaigns they respond to.

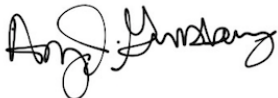
Throughout these challenges, we have been fortunate to have a dedicated and resilient staff who show up every day, ready to tackle whatever comes their way. Their commitment to the Southwest Florida Symphony is truly commendable.

- Nora Lastre-Broughton celebrates her 9th anniversary with us this year. She began her work on the admin team as our librarian. During her tenure, she has identified areas where our staff needed support over the years, both artistically and administratively, and absorbed those responsibilities. As a result, she has risen the ranks to become our Chief Operating Officer.
- Keenan Riley celebrates his 5th anniversary with us this year. He was hired in 2019 as part-time box office support but quickly jumped in to share his visionary graphic design talents with us and his gift for customer service, seemingly making every patron happy. He has risen the ranks to become our Creative and Marketing Director.
- Erica Dubson celebrates her 3rd anniversary with us this year. She joined us in 2020 from Barbara B. Mann Hall's box office staff. She has finally streamlined box office activity between the two businesses. Though her job description states her responsibilities entirely involve box office management and receptionist duties, she independently undertook Quickbooks training to support our bookkeeping efforts and is tied for exceptional customer service with Keenan.

- Robert Van Winkle celebrates his 2nd anniversary with us this year. During his tenure, he has quite literally reinvented our education and community outreach department and has been the perfect Symphony Society liaison. Our Discovery Club gatherings are so comprehensive and entertaining that adult patrons attend them after pre-concert lectures. He has reached more service clubs and retirement homes through speaking engagements than we have in decades. Barbara B. Mann Hall has created a verb from Robert's name, citing that the Conductor's Circle Club is "Van Winkled" when he decorates it because he works such magic in that environment. We can't wait to see what he does with our new mobile educational tool, The Music Box Truck, in the coming year.
- Yordan Tenev and Kat Baloff have shared personnel management and librarian duties, celebrating their 3rd anniversary with us this past August. Kat has created an exceptional organization system for musician employment and recordkeeping, as well as host housing coordination. Yordan has done everything in his power to ensure the timely distribution of music to our orchestra. As a married couple, they have done a remarkable job covering many behind-the-scenes responsibilities that make our artists' work possible.
- Raniero Tazzi starts his 2nd year with us this season and has exhibited remarkable patience in his interactions with the artistic staff. He has also undertaken any task necessary to execute rehearsals and concerts flawlessly.
- Ricardo Chinchilla began his first season with us in September. He will support the tactical needs of our artistic operations department, including stage set-up and breakdown, guest artist transportation, and equipment transportation. He will also assist Robert with youth education initiatives. As a substitute trumpet player with our orchestra and having worked as an operations contractor with us in the past, we already know he's an excellent fit for the well-balanced team we have in place.

Despite last year's challenges, morale is at an all-time high with our admin team. They show up to work with a sense of ownership and pride in the Southwest Florida Symphony. It is our sincere hope that one day, in the not-too-distant future, our artistic staff will view themselves as partners with our board and staff as well. Through partnership and collective investment in this organization, we will see the growth in attendance, philanthropy, and educational reach we all desire. Here's to a "surprise-free" bright 64th season ahead.

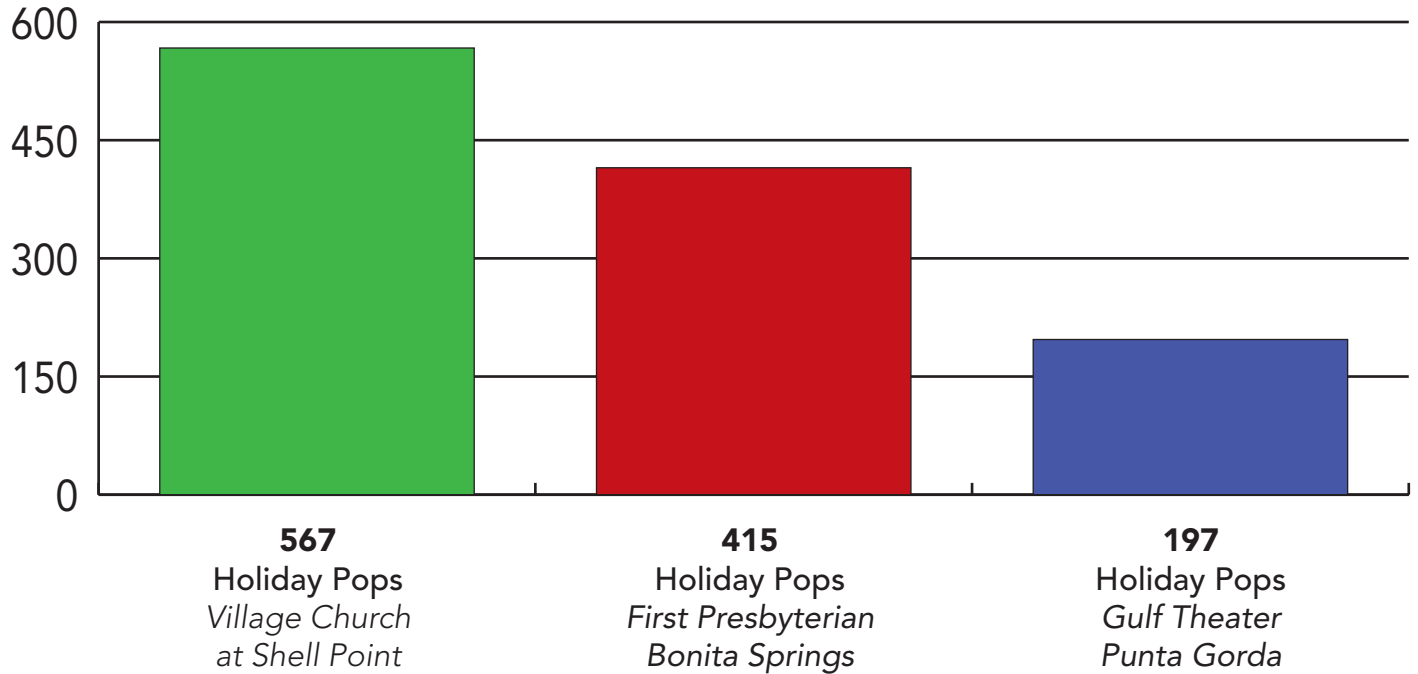
Musically yours,



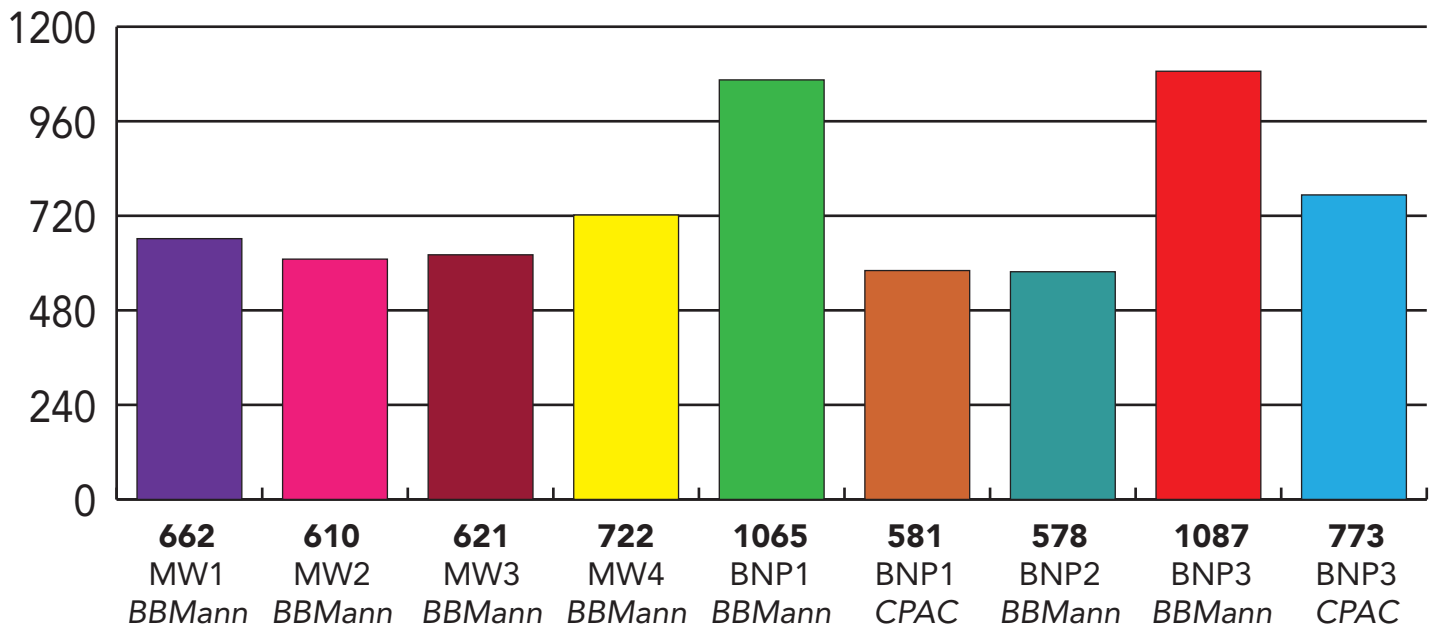
Amy J. Ginsburg
Chief Executive Officer

2022-23 Ticket Sales

Holiday Pops Ticket Sales

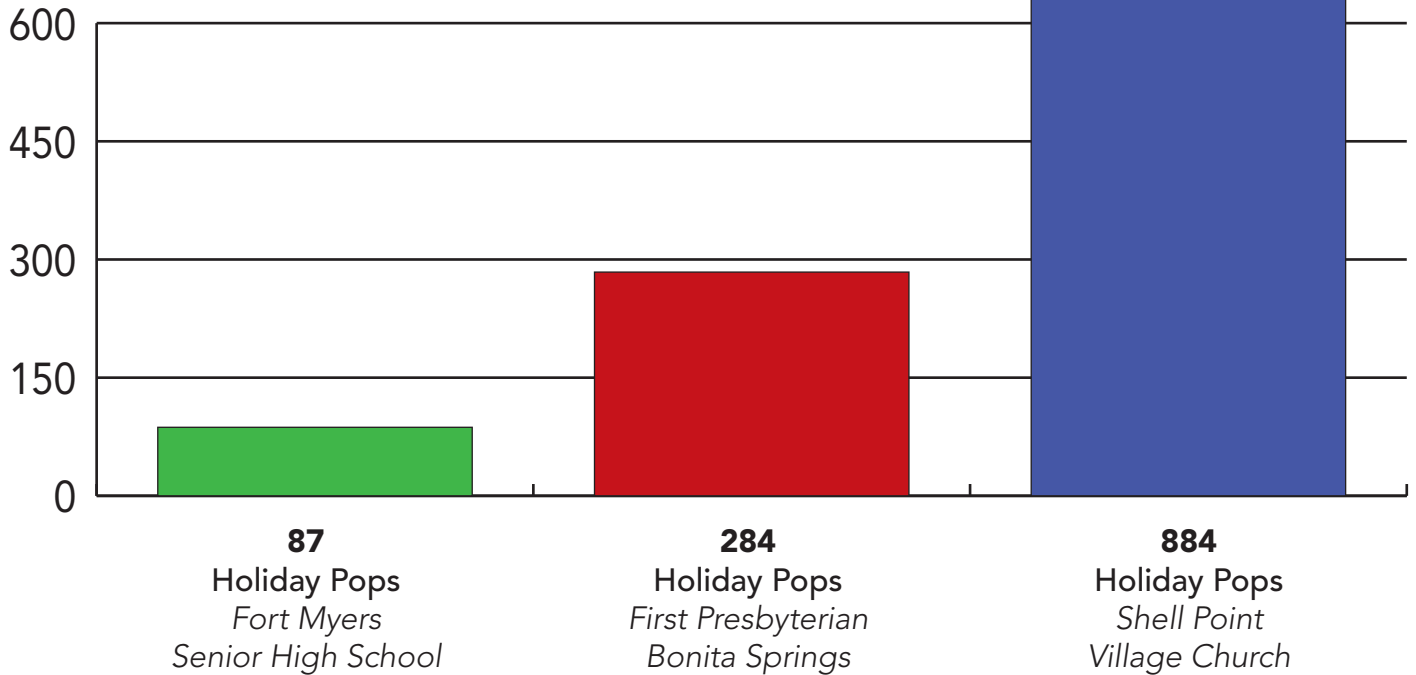


MainStage Ticket Sales

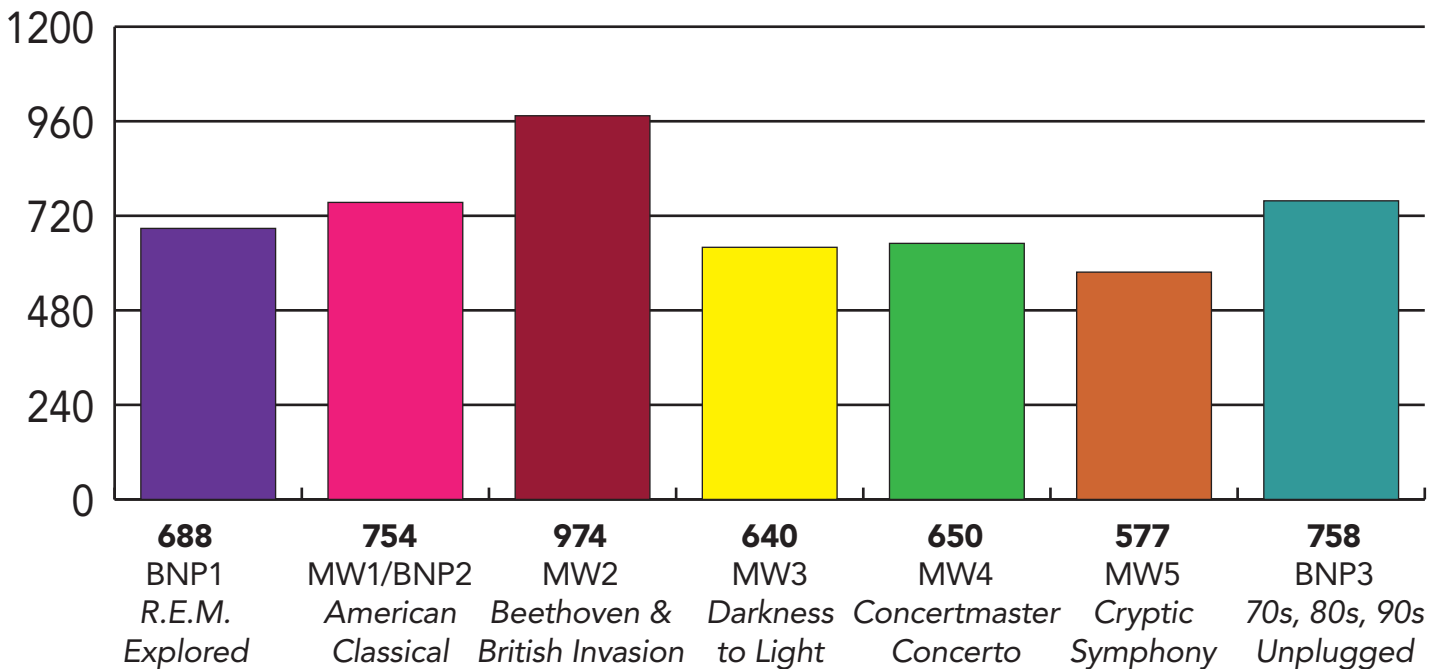


2023-24 Ticket Sales

Holiday Pops Ticket Sales



MainStage Ticket Sales





Musicians' Committee

Jean Phelan, Chair
 Dr. Dione Chandler, 1st Vice Chair
 Rachel Cox, 2nd Vice Chair
 Scott Radloff, Secretary
 Scott Ellington, Treasurer

The Southwest Florida Symphony

Alex Albanese	42 years - Ft. Myers, FL
Jeff Apana	16 years - Ft. Lauderdale, FL
Renata Arado	7 years - Sanibel, FL
Ariadne Barbe-Villa	24 years - Naples, FL
Kathleen Beard	20 years - S. Daytona, FL
Gene Berger	17 years - Muncie, IN
Todd Betz	33 years - Surprise, AZ
Victoria Bramble	2 years - Wellington, FL
Dr. Dione Chandler	22 years - Tampa, FL
Troy Chang	10 years - Tampa, FL
Hannah Cho	17 years - Ft. Myers, FL
John Copella	19 years - Orlando, FL
Rachel Cox	26 years - Ft. Myers, FL
Scott Crowley	19 years - Naples, FL
Scott Davis	7 years - Austin, TX
John DiPuccio	21 years - Coral Springs, FL
Kasia Dolinski	19 years - Wesley Chapel, FL
Ariel Eliot	17 years - Naples, FL
Scott Ellington	33 years - Ft. Myers, FL
Alan Evans	25 years - Sarasota, FL
Chase Farrell	2 years - Houston, TX
Isaac Fernandez	10 years - Ft. Myers, FL
Courtney Filner	10 years - Naples, FL
Michael Forte	37 years - Lake Worth, FL
Jennifer French	23 years - E Fallschop, PA
T.J. Glowacki	27 years - Clearwater, FL
Joe Henderson	2 years - Jacksonville, FL
Antonio Innaimo	15 years - Naples, FL
Sharon Janezic	20 years - Boynton Bch, FL
Kay Kemper	34 years - Boca Raton, FL
Cory Kirby	2 years - Tallahassee, FL
Tom Kracmer	35 years - Ft. Myers, FL
Greg Lane	25 years - Miami, FL
Bill Larsen	42 years - Ft. Myers, FL
Beth Larsen	32 years - Ft. Myers, FL
Nora Lastre	9 years - Ft. Myers, FL
Orin Laursen	2 years - Miami, FL
Davi Lira	6 years - Portland, OR
Katie Loesch	7 years - Ft Wayne, IN
Kris Marshall	22 years - Ft. Myers, FL
Angela Massey	13 years - Ft. Myers, FL
Stacey McColley	24 years - Tampa, FL
Aaron Merritt	5 years - Miami Bch, FL
Louis Nanson	26 years - Miami, FL
Austin Pancer	2 years - Cincinnati, OH
Jean Phelan	19 years - St. Petersburg, FL
Dajiang Qi	20 years - Tampa, FL
Scott Radloff	27 years - Orlando, FL
Eilot Roske	2 years - Miami, FL
Solji Shin	7 years - Oakland Pk, FL
Alexis Smith	6 years - Brookline, MA
Hideki Sunaga	25 years - Coral Springs, FL
Tom Suta	37 years - Lakewood Ranch, FL
Yordan Tenev	7 years - Bradenton, FL
Dana Tolan	14 years - Apopka, FL
Shane Wedel	10 years - Sarasota, FL
Baoling Xu	28 years - Tampa, FL
Dr. Dean Zhang	8 years - Bratenahl, OH
Yuhao Zhou	2 years - Lauderhill, FL
VACANT	Violin
VACANT	Violin
VACANT	Violin
VACANT	Violin
VACANT	Viola
VACANT	Viola
VACANT	Viola
VACANT	Cello
VACANT	Cello
VACANT	Cello
VACANT	Principal-2 nd -Violin
VACANT	Principal Bassoon
VACANT	2 nd -Trumpet

Southwest Florida Symphony from the Musicians' Perspective

October 2024

Over the years, we've seen at SWFSO annual meetings reports presented to our donors and board that often paint an overly optimistic picture, implying that all is well and thriving. However, we want to offer a different perspective—one that reflects the realities faced by the musicians.

- We've seen a significant decline in both the number of symphonic concerts presented and the size of our audiences. There are no major programs using our full talented orchestra scheduled until the first Masterworks in mid-January. This is unheard of by every professional orchestra in Florida which all have major programs planned by Thanksgiving.
- The SWFSO Youth Orchestra Program has been reduced to the point of no longer being a part of this organization. This is a disservice to our eager youth and will further negatively impact SWFSO's community engagement and relevance.
- The type of pops music and watered-down classical programs in recent years strays far from the core artistic mission of a professional symphony orchestra.
- You will probably be told that this is the current trend in classical music. This is simply not true. A semi-professional ensemble right here in our community has surpassed SWFSO in providing wholesome quality programming, number of concerts presented, and audience size. Our appearances at Barbara B. Mann have become so infrequent, it is fair to say we have fallen off the cultural radar here.
- This shift has led to a record number of musicians permanently leaving the orchestra, and we are struggling to replace them with committed, qualified musicians.
- We've seen disaffected longtime musicians, dedicated symphony staff, and board members with strong local reputations, leave and shift their focus to supporting *other* arts organizations instead of SWFSO. (cont.)



The Southwest Florida Symphony

Alex Albanese	42 years - Ft. Myers, FL
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Renata Arado	7 years - Sanibel, FL
Ariadne Barbe-Villa	24 years - Naples, FL
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Ariel Eliot	17 years - Naples, FL
Scott Ellington	33 years - Ft. Myers, FL
Alan Evans	25 years - Sarasota, FL
Chase Farrell	2 years - Houston, TX
Isaac Fernandez	10 years - Ft. Myers, FL
Courtney Filner	10 years - Naples, FL
Michael Forte	37 years - Lake Worth, FL
Jennifer French	23 years - E. Felloship, PA
T.J. Glowacki	27 years - Clearwater, FL
Joe Henderson	2 years - Jacksonville, FL
Antonio Innaimo	15 years - Naples, FL
Sharon Janezic	20 years - Boynton Bch, FL
Kay Kemper	34 years - Boca Raton, FL
Cory Kirby	2 years - Tallahassee, FL
Tom Kracmer	35 years - Ft. Myers, FL
Greg Lane	25 years - Miami, FL
Bill Larsen	42 years - Ft. Myers, FL
Beth Larsen	32 years - Ft. Myers, FL
Nora Lastre	9 years - Ft. Myers, FL
Orin Laursen	2 years - Miami, FL
Davi Lira	6 years - Portland, OR
Katie Loesch	7 years - Ft. Wayne, IN
Kris Marshall	22 years - Ft. Myers, FL
Angela Massey	13 years - Ft. Myers, FL
Stacey McColley	24 years - Tampa, FL
Aaron Merritt	5 years - Miami Bch, FL
Louis Nanson	26 years - Miami, FL
Austin Pancer	2 years - Cincinnati, OH
Jean Phelan	19 years - St. Petersburg, FL
Dajiang Qi	20 years - Tampa, FL
Scott Radloff	27 years - Orlando, FL
Eilott Roske	2 years - Miami, FL
Solji Shin	7 years - Oakland Pk, FL
Alexis Smith	6 years - Brookline, MA
Hideki Sunaga	25 years - Coral Springs, FL
Tom Suta	37 years - Lakewood Ranch, FL
Yordan Tenev	7 years - Bradenton, FL
Dana Tolan	14 years - Apopka, FL
Shane Wedel	10 years - Sarasota, FL
Baoling Xu	28 years - Tampa, FL
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VACANT	Principal-2 nd -Violin
VACANT	Principal Bassoon
VACANT	2 nd -Trumpet

If donations are down, perhaps it's because when the orchestra is not actively performing, the community is less inspired to donate.

Restoring the Youth Orchestra Program is essential—not only for our educational mission but also for cultivating our future donors and audiences. We also need to return to more traditional full symphonic programming, as this aligns with our founding identity and what our veteran and savvy audiences of Ft. Myers deserve.

All the musician members of SWFSO are overqualified for this job and have been training for the intricacies of symphonic music before we were 10 years old, in addition to earning multiple college degrees. The musicians of SWFSO are the driving force behind its "World Class Music", which is neither showcased nor nurtured. A lot of us teach in nearby colleges, yet musicians have rarely been utilized to coach, mentor, or inspire the youth in Ft. Myers in recent years. If the vision is to turn SWFSO into a rock band, please go work for or support a different organization; let's not diminish what was once the premier performing classical arts organization in Southwest Florida into an amateur club rock band.

What is needed now more than ever from the leaders of this organization is a comprehensive short and long-term artistic and strategic plan that addresses both financial stability and our goal of regaining prominence in the community. Your musicians are eager to collaborate on a mission for positive growth but feel the current path we are on will lead to the downfall of this organization that we all care deeply about.

We trust that the goal of the members of this board, our donors, and our community is not to oversee the demise of this 64-year-old organization, but rather to foster its growth and revitalization. We believe that a thriving Southwest Florida Symphony is still achievable, but only if we change the current course and address some hard truths.

THE SOUTHWEST FLORIDA SYMPHONY SOCIETY ANNUAL REPORT

2023-2024

The Southwest Florida Symphony Society underwent a restructuring of our organization at the end of the 2023 year. Our members were not interested in serving in leadership positions due to other responsibilities and age or were fatigued because we did not have enough volunteers to handle all the work involved in running the organization.

A few Past Presidents brainstormed how we could run the organization without Officers, take care of the day-to-day business, and raise funds. We decided to put together four teams: Administration, Hospitality, Scholarship, and Fundraising.

Last year (2023-2024), we had 120 renew their membership. Our first fundraiser of the season was "Key Signatures" (August 2023). We held two luncheons (October 2023 & January 2024), a Gala (An Evening in Paris) on March 2, 2024, and an Appreciation cocktail party in April, and a Meet-Up Luncheon in May (Point 57). Our year end contribution to the Southwest Florida Symphony Orchestra on June 30, 2024, was \$52,000, which also included monies from a savings account held by the Society.

We also held 3 Scholarship Competitions for the Van Sickle in February, the Symphony Society in March, and the Prescott in April. We also provided ambassador services in the Symphony's Conductor's Circle Club room at Barbara B. Mann concerts.

Twelve volunteers from the Society and four staff members from the Symphony admin team managed all the above events and services. As you can imagine, we need more assistance to accomplish the work that we need to do this coming season.

We launched our Key Signatures campaign in September of 2024, which ordinarily provides the Southwest Florida Symphony with essential financial support as it wraps up concert preparations for the coming season. We hope you will consider giving generously to that initiative. As always, each donor will be listed as a Key Signature supporter, by level, in the Symphony's program book for the entire concert season, with a minimum gift of \$50.00.

Though our membership has dwindled in numbers, many continued to enjoy attending monthly luncheons and fundraising events and providing money through donations or purchasing raffle tickets for the SWFL Symphony Society Scholarship fund.

For us to succeed in the 2024-2025 season, we need more people to volunteer and take ownership of one of the following events to enable us to continue to raise money and grow audiences for the Southwest Florida Symphony. The Symphony staff has become more involved and supportive than ever in the Society's lifetime, so you will not undertake this work alone. An ambitious, exciting calendar of Society-driven events was planned at the beginning of the Symphony's fiscal year. We now need your help with co-leadership with Symphony staff to make them successful.

- Now – Symphony Society Yearbook
- September – October – Key Signatures fundraising campaign.
- Friday, February 28, 2025 – Society Gala
- Friday, March 28, 2025 – Society Fashion Show & Luncheon

If you are interested in co-chairing these initiatives with the Symphony staff, please reach out to the Symphony office by calling 239-418-0996 or email Amy Ginsburg, the Symphony's CEO, at aginsburg@swflso.org or the Symphony's Education and Community Outreach Ambassador, Robert Van Winkle at rvanwinkle@swflso.org to learn more about how to get involved. Without volunteer support (or expression of interest in these events continuing), it may not be possible to execute the activities we all look forward to each season.

Sincerely,

Liz Marnul

Member of the Board of Trustees of the SWFL Symphony Orchestra &
Immediate Past-Chair of the Fundraising Team
For the Southwest Florida Symphony Society



Education Outreach for Season 63

The season began with an outreach to all Lee County School music teachers in grades K – 6 about the Symphony Discovery Club and the Young Peoples Concert. We have been invited to present to the teachers at the annual orientation meeting held in August every year.

Our relationship with the Arts Coordinator at Lee Schools remains strong. Once again, this season, the school district has supported the Young People’s Concert with invitations, a performance venue, and transportation. Approximately 1,200 fourth—and fifth-grade students attended two performances at Fort Myers High School in February.

The Symphony Youth Orchestra held weekly rehearsals and performed three concerts this season at the Heights Community Center. In January, a major fundraising event for the Youth Orchestra program raised over \$2,000 and also took place at the Heights Center.

Pat Neumann and Liz Marnul volunteered again to organize and execute the John Hudson Scholarship, which awarded \$1,000 to a graduating senior. This year’s award winner went to a young man who has played in the Youth Orchestra for many years and is continuing his education at Florida Southwestern State College.

Educational outreach extended to the library system in Lee County, with three presentations conducted by Robert Van Winkle for patrons at the main library branches in Cape Coral and Fort Myers.

The Discovery Club continued to meet in the Lobby of BBMann Hall at 7:00 p.m. Robert has reworked the gatherings to include handouts and giveaways for students who attend. Student-oriented presentations include trivia, background information, and tips on what to listen for in the music being performed. Participation in the Discovery Club grew by adding over 15 new families to the roster in season 63.

The biggest and most exciting news in the Education Department is the addition of “The Music Box”. This 14’ box truck will save the orchestra the expense of renting a truck to transport instruments, and will serve as a rolling classroom for school visits and community events.

Grant money from the Foulds Foundation covered 70% of the cost of the vehicle, and Robert negotiated a sponsorship with Galloway Ford for the remaining purchase.

The truck has been shrink-wrapped and is a perfect “rolling billboard” for the orchestra.





Southwest Florida Symphony announces lineup for 63rd season

FORT MYERS, Fla. (April 28, 2023) – The Southwest Florida Symphony, Lee County’s only professional orchestra, featuring musician who have studied at the world’s most prestigious conservatories, is excited to announce an innovative and diverse lineup of performances for the 2023-24 season. Acclaimed music director, Maestro Radu Paponiu leads the orchestra through its 63rd of classical music’s most celebrated works, many of which are woven with groundbreaking pieces.

The symphony opens the season on Oct. 21 with Brave New Pops, “R.E.M. Explored” featuring selections from R.E.M.’s legendary playlist newly imagined for the orchestra, with R.E.M.’s Mike Mills performing his eponymous Concerto for Violin, Rock Band and Orchestra alongside Grammy-nominated violinist Robert McDuffie.

On Nov. 4, the orchestra fuses a Masterworks and Brave New Pops Concert, blending classic Masterworks with jazz. The symphony and Marcus Roberts Jazz Trio perform a jazz arrangement of Rhapsody in Blue by George Gershwin in honor of the piece’s 100th anniversary. Also on the program is Aaron Copland’s iconic Four Episodes from Rodeo, John Williams Star Wars Suite and Leonard Bernstein Symphonic Dances for West Side Story. The remaining Masterworks classical concert series will feature extraordinary guest artists such as Time for Three violinist Charles Yang, locally beloved pianist Alexandra Carlson, Southwest Florida Symphony Concertmaster, Orin Laursen, and Sphinx Competition winner and cello prodigy, Sterling Elliot.

The third and final 2023-24 Brave New Pops Concert will take place May 18, 2024, and delight audiences with a nostalgic throwback to the 80s and 90s featuring tunes from the days of music television’s acoustical concerts, with returning guest Maestro Andrew Lipke. Additionally, Lipke will present the symphony’s special Holiday Pops program at four venues throughout Lee and Charlotte counties.

Season subscriptions and single tickets to select concerts are currently on sale.

To purchase tickets or learn more, visit swflso.org/tickets/.

The Southwest Florida Symphony made its debut as a community orchestra on April 15, 1961, playing in schools and community centers, with a roster of only 24 volunteer musicians. Today, the symphony boasts a roster of 70 world-class professional musicians, and is Lee County’s only fully

professional orchestra. The Southwest Florida Symphony's 63rd year continues the orchestra's tradition of artistic excellence and innovation as Music Director Maestro Radu Paponiu leads another season of spectacular performances. Maestro Paponiu, the sixth music director in the organization's history, also serves as the associate conductor and youth orchestra director for the Naples Philharmonic in addition to guest-conducting with orchestras throughout the United States and Europe.

For more information about the Southwest Florida Symphony, upcoming season performances and subscription and ticketing information, visit swflso.org or call 239-418-1500.

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Contacts:

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Southwest Florida Symphony



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