

Case for Support



Annual and Planned Giving Programs Ann Arbor Summer Festival 2011–2012

Estimated Attendance: 60,000+



PROFILE:

The Ann Arbor Summer Festival is an exhilarating celebration of performing arts, outdoor entertainment, and community spirit. A boutique music and arts festival, the three-week gathering offers dozens of performances, activities, exhibitions, and screenings representative of the best in music, dance, comedy, film, street arts, and family entertainment.

MISSION:

The Ann Arbor Summer Festival's mission is to present a world-class celebration of arts and entertainment that enriches the cultural, economic and social vitality of the region.

CORE VALUES:

Excellence • Diversity • Relevance

VISION:

The Ann Arbor Summer Festival aspires to be a nationally recognized arts festival and enduring local treasure – a widely anticipated, interactive hub of creative and community energy.

PRIMARY GOALS:

- Deepen audience and community engagement
- Build a financially sustainable organization
- Strengthen key partnerships and develop new mutually beneficial relationships
- Further enhance and extend the reputation of the festival
- Continuously improve leadership and administration

PROGRAM HISTORY:

Founded by Eugene Power, and established as an equal partnership between the City of Ann Arbor and the University of Michigan, the Ann Arbor Summer Festival presented its first full season in 1984. Early festival seasons emphasized classical music and theater, but have since become more popular and diverse in nature, encompassing a breadth of performance genres.

What began with a vision for a summer cultural event that would connect audiences with world-class artists, bring community together, and showcase the city and state as a major arts destination, now flourishes as one of the leading multi-arts festivals in the country.



Photo credit: Myra Klarman

THE FESTIVAL IN 2012

Today, the Ann Arbor Summer Festival produces two concurrent programs, one indoor and one outdoor, at various venues and spaces across the University of Michigan campus and in downtown Ann Arbor. The indoor Mainstage series includes ticketed performances of world-class music, dance, theater, and comedy. The outdoor program, Top of the Park, is held along a beautiful campus green and offers admission-free concerts, movies under the stars, open-air spectacles, and unique family attractions.

Now entering its 29th season, the Ann Arbor Summer Festival offers a progressive mix of regional, national, and international artists of all disciplines. Presenting over 100 scheduled events each season and attracting a diverse audience of 60,000 people, the festival continues to grow as a major cultural event in the Ann Arbor community, and as an internationally recognized celebration of arts that enriches the cultural, economic, and social vitality of the region.

RECENT ACCOMPLISHMENTS:

The 2011 Ann Arbor Summer Festival was a critical, popular, and financial success, drawing tens of thousands of people from across the city and region. The festival garnered audience acclaim across all areas of programs, including our Mainstage performances and Top of the Park attractions. National and international artists joined regional performers and local partners in transforming Ann Arbor into a vibrant, creative playground, a place brimming with entertainment and artistic inspiration for 21 nights.

Key achievements in 2011 included:

- Presented three weeks of outstanding arts experiences to over 60,000 people, including: 10 ticketed indoor attractions; 70 admission-free outdoor performances; and dozens of supporting cultural programs and activities.
- Offered an exciting lineup of emerging and established artists, including a number of festival debuts, regional premieres, and Ann Arbor exclusives, with artists representing Australia, Europe, and North America.
- Impacted over 600 children and adults through various free education activities throughout the season, including artist discussions, workshops, demonstrations, and screenings.
- Partnered on collaborative programs with other area arts and cultural institutions, including: Ann Arbor Area District Library, Ann Arbor Film Festival, The Neutral Zone, and many others.
- Provided employment and performance opportunities to hundreds of artists from Southeast Michigan, including 38 groups making their first appearance at the festival.
- Completed the second year of a comprehensive five-year strategic plan with a focus on five goals, including: deepening audience and community engagement; building a financially sustainable organization; strengthening key partnerships; further enhancing and extending the reputation of the festival; and continuously improving festival management operations.

VALUE PROPOSITION:

The Ann Arbor Summer Festival is a pillar of **quality of life** in the region and a vibrant catalyst for **community strength** and **economic development**.

FESTIVAL CONTRIBUTIONS & PUBLIC BENEFIT:

Artistic Excellence

For nearly three decades, the festival has presented a wide range of innovative artists and visionaries who have helped influence, shape and redefine performance genres through their talents and creative expression. With a curatorial approach to our programming, we are committed to the highest artistic standards, production values, and quality of patron experience in relation to all our season offerings.

Diverse Programming

As a reflection of the diverse community we serve, the festival presents, produces, and promotes a wide variety of cross-cultural, multicultural, and multiethnic work. We believe that experiences in the arts can provide us with a common language for understanding our differences, as well as the values we share. This truly embodies the spirit of the festival: community engagement and high-quality arts experiences.

Community Accessibility

The festival's community impact is comprehensive and far reaching with over 85 percent of festival events free to the public. Audiences are comprised of a wide cross-section of the greater Ann Arbor community, urban and rural, including children, teens, young adults, families, and senior citizens. All activities are designed to be inclusive: all ages, backgrounds, socio-economic groups, and ethnicities.

Cultural Participation

Through our outreach and audience development efforts, the festival looks to build bonds with individuals and partner organizations to help create a community that is engaged with the arts. To ensure that Ann Arbor and surrounding geographical areas grow and remain dynamic, we deliberately seek to gain a further understanding and appreciation of others in our wider community.

Educational Impact

As we look to increase arts participation and deepen our existing audience's level of engagement, the festival offers a number of free education opportunities in collaboration with visiting guest artists and local partners. By presenting these activities, which range from workshops to master classes, our goal is to offer the community an imaginative way to discover, understand, and appreciate the performing arts.

Economic Development

With over 60,000 attendees each season, the festival's estimated direct, local impact is over \$1 million. From hotels and restaurants to shopping and leisure pursuits, we invest significant resources into Ann Arbor and boost the economic activity in the region. In addition, as an inherently labor-intensive event, the festival contributes to the local economy by engaging local food vendors, contracting regional artists, and employing hundreds of seasonal workers throughout our production period.

OUR CHALLENGE:

As an independent nonprofit 501(c)(3) organization, the average cost of producing the Ann Arbor Summer Festival each year is \$1.4 million. Earned revenue from ticket and beverage sales covers only 60 percent of total expense; support from corporate sponsors, foundations, government agencies, and individual donors makes up the balance.

The importance of place, shared experiences, and strategic relationships is evidenced through the support the festival receives from the community it serves. We understand the need to make a compelling case for our work, now more than ever. Therefore, we reaffirm our commitment to provide a truly inclusive cultural experience that celebrates our community, the richness of our stories, the talent of our artists, and the creativity of the human spirit.

OUR NEEDS:

As an institution with limited cash reserves, compared to other peer arts organizations, the festival requires private funds to sustain a spectacular array of artistic and public service programs, as well as the capital improvements that enhance the patron experience. Successful fundraising initiatives are both ongoing and necessary in order for us to maintain the highest standards of excellence, accessibility, diversity, innovation, and competitiveness.

We are indebted to those who have been part of our growth since the beginning, and we hope to continue to expand the number of donors and advocates for our cause. The festival has both a resourceful board and an experienced management team in place. Nevertheless, we still seek improvement in a number of areas. In supporting the festival, donors make a tangible expression of their dedication to our mission. Any gift, no matter the size, will assist us in the following areas:

- Provide significant funds to address our most critical needs
- Generate the necessary momentum and credibility to achieve our strategic objectives and fundraising goals
- Have a multiplying effect by attracting other donors

YOUR COMMITMENT:

Whether you have donated before, volunteered your time, attended an indoor performance, or enjoyed Top of the Park, you are a part of the engine that keeps the festival going. So in the spirit of community that we hold at the center of our mission, we urge you to consider making a gift to the festival to help us maintain the highest quality programs and preserve this vibrant celebration for future generations.



Photo credit: Myra Klarman

Ways to Give



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OVERVIEW:

Thank you for considering a gift. There are many ways to provide support to the Ann Arbor Summer Festival, all of which allow you to make a meaningful philanthropic gift while receiving tax benefits.

Giving may be done in any number of ways: from online donations to including the festival in your estate plans. Whichever method you choose, you may give an unrestricted gift to be used for general operating support or to fund a specific festival program.

We welcome the opportunity to visit with you as you consider a gift. We recommend you consult your personal financial advisor to determine how these examples may relate to your own financial situation.

OUTRIGHT GIFTS:

- **Cash Gifts:** Cash gifts can be made through credit/debit card transactions, outright cash, or personal checks, cashier's checks or money orders made payable to the Ann Arbor Summer Festival.
- **Securities, Stocks and Bonds:** A substantial tax advantage may be available to you if you give securities that have appreciated significantly in value, especially when the tax deduction for the gift at fair market value and the probable avoidance of capital gains taxes are taken into account.
- **Real Estate:** If you own property that is fully paid off and has appreciated in value, an outright gift may be the simplest solution. You can potentially deduct the fair market value of your gift, avoid all capital gains taxes and remove that asset from your taxable estate. You can transfer the deed of your personal residence, second home, income property, land or farm to the festival now and keep the right to use the property for your lifetime and that of your spouse.
- **Personal Property:** Gifts of tangible personal property (including, but not limited to works of art, manuscripts, literary works, jewelry, antiques, or collectibles) work well if the asset has appreciated significantly and if it is related to the tax-exempt purposes of the festival. Gifts exceeding \$5,000 require an appraisal to determine the fair market value for receipting and tax purposes.

MEMORIAL & HONORARY GIFTS:

A gift made in memory or in honor of a family member or friend is a generous way to memorialize the individual's life, accomplishments and association with the festival. We notify the honoree or their family of the names and the addresses of those making the gift.



Photo credit: Myra Klarman

MATCHING GIFTS:

An easy way to double or even triple your donation to the festival is to find out if your company has a matching gift program. Such programs typically match all or a percentage of employee contributions to charitable organizations, making the employer a partner in their employees' personal philanthropy.

PLEDGES:

The festival welcomes your gift through our Festival 5000 pledge campaign, a formal statement of intention to make a \$5,000 gift to the festival over a five-year period. With a pledge, you may complete your gift by making regular payments over time, allowing you to give more generously than you originally may have considered. Each payment on your pledge is eligible for an income-tax charitable deduction.

PLANNED & DEFERRED GIFTS:

Planned giving is a meaningful way to create a legacy at the festival while advancing your financial and estate-planning objectives. Your gift, or bequest, may include property, securities, or cash. It may be a specific dollar amount, a percentage of the estate, or a remainder after other distributions have been made. Bequests are distributed at an estate's settlement, have no impact on your current assets, and are often fully deductible for estate tax purposes.

We invite you to become a partner with the festival through a planned gift, and join our Legacy Circle. The Circle is our newest giving category for those people who generously remember the festival in their wills or other estate planning.

ENDOWMENT GIFTS:

In 2005, longtime festival supporter Connie Kinnear established an endowment fund for the festival at the Ann Arbor Area Community Foundation, in the hopes that it will become a long-term, secure source of funding for the organization. This added security allows the festival to grow and to support its many programs and activities.

To make a gift to the Ann Arbor Summer Festival Endowment Fund, please send a check to the Ann Arbor Area Community Foundation, specifying that you would like the funds to go to the Ann Arbor Summer Festival Endowment Fund.

DISCLAIMER: The information provided here is intended only to provide an overview of gift options. Ann Arbor Summer Festival cannot render tax or legal advice. There are special rules, exceptions and limitations that govern the above areas. We strongly encourage you to seek professional legal, estate planning and/or financial advice before deciding upon your course of action.



Photo credit: Myra Klarman