Visionary executive with over twenty-five years of operational, financial, development, and marketing leadership.

# **EXPERIENCE**

# **EXECUTIVE DIRECTOR**

#### Jefferson Performing Arts Society

Chief executive responsible for a \$4.2 million performing arts organization and managing and programming the premier Jefferson Parish-owned state-of-the-art performance venue serving the greater New Orleans

# **OPERATIONS**:

- Interviewed, hired, onboarded, and administered benefits for all full-time new personnel, including directors, managers, staff, interns, and volunteers.
- Managed operations for all facilities, including Jefferson Performing Arts Center, Westwego Cultural Center, Westwego Performing Arts Theatre, Scenic Studio, artist residence, and administrative offices, coordinating procurement of all services, personnel, materials, tools, machinery, and equipment for each.
- Led request-for-proposal preparation, was awarded contract, and was appointed General Manager for the operational and financial management of Jefferson Performing Arts Center in July 2022—the most technologically advanced, \$54.5 million, 1,041 seat venue in the Greater New Orleans Region.
- Established, revised, and enforced the employee handbook and HR policies; financial control, corporate credit card, payroll, cash management, and investment policies; whistleblower protection policy; and Covid-19 Guidelines. Updated preventive and predictive maintenance procedures to retain the best and safest conditions.
- Reorganized company structure and created job descriptions resulting in improved efficiency and productivity, clarified chain of command, and increased individual accountability.
- Implemented time-tracking solutions for non-exempt and contract employees and instituted new earned vacation, personal, and sick-day leave procedures.
- Ensured vendors, employees, subcontractors provided current licensing, bonding, and insurance documentation.
- Oversaw client support satisfaction for ticket sales, donors, and external facility rental contracts.

# FINANCIAL:

- Managed all financial activities, including daily general ledger activity and income/expense reports, and training all managers, directors, and financial personnel regarding accurate expense coding and documentation.
- Improved financial practices, policies, and processes for greater clarity and efficiency for strategic planning for company mission. Rebuilt the chart of accounts for multi-year forecasting.
- Monitored income/expenses, providing analyses, forecasts, and suggested rectifications to managers and directors.
- Prepared annual budget and long-term strategic financial plans for maximum organizational growth and investment.
- Coordinated annual financial audit and 990 preparations with external auditors.
- Prepared and executed salaried and hourly payrolls, collecting and maintaining all appropriate financial tax and employment documentation.
- Developed new strategic growth opportunities with directors and managers to increase market presence and anticipate future needs and challenges.
- Responsible for ensuring GAAP and legal compliance for all contracts and expenditures.

# DEVELOPMENT, MARKETING, EXTERNAL RELATIONS:

- Instituted individual giving campaigns focused on donor benefits, levels, and movement to strengthen donor base.
- Built relationships with individuals, corporations, and government officials, facilitating open communications and coordination of financials, operations, and community interaction.
- Rebranded organization with an image of inclusivity, diversity, equity, and access, developing new points of entrance to the organization through new community partnerships, special public events, and live streamed offerings.
- Expanded the public image of the organization by introducing crews, artists, staff, and volunteers to the audience through interviews, publications, and social media.
- Implemented new marketing plans with a wider and diverse community reach through reader boards, geo fencing, and zip drops.

2020-2023 Metairie, LA

#### **EXECUTIVE DIRECTOR Opera Naples, Inc.**

#### 2019-2020 Naples, FL

Chief executive responsible for a \$5.9 million company with a mission to be known for excellence and innovation by presenting quality opera, musical performances, education, and community engagement programs.

# **OPERATIONS & FINANCIAL**:

- Developed and evolved the five-year strategic plan with leadership to create engaging future seasons and diversify the company's activities. Managed staff and policies. Approved and signed all contracts and checks. Managed the Wang Opera Center and John & Judy Hushon Theater to maximize profit, including marketing and contracting third-party usage and procurement of all services, personnel, and materials necessary for the upkeep and expansion of the facility.
- Directed all financial activities including daily income/expenses against budgetary expectations, reporting variances to the appropriate department heads for potential changes needed. Modified previous budget format to clarify trends and variances, and prepared future budget to reflect the changes necessary to be more clearly reflect trending. Prepared monthly financial reports and projections for staff and Board.

# DEVELOPMENT, MARKETING, EXTERNAL RELATIONS:

- Created and implemented a development plan that maximized income, cultivated organizational partnerships in the region. Established and executed fundraising strategies and activities that met realistic goals, oversaw donor database and communications, and coordinated grant submissions. Collaborated with the Board and Artistic Director on execution of development plan for greatest impact.
- Developed a marketing plan with strategies to cultivate new audiences with new performance opportunities. Worked closely with the artistic team to manage existing and develop new educational activities. Expanded relationships with area schools and colleges for greater impact on local youth and visibility with younger groups.

# **EXECUTIVE DIRECTOR**

#### 2010-2019 New Orleans, LA

**New Orleans Opera Association** *Chief executive responsible for a \$5.4 million company with a* 

*Chief executive responsible for a \$5.4 million company with a mission to produce operatic productions and provide education opportunities to the southern Louisiana community.* 

# **OPERATIONS & FINANCIAL**:

- Coordinated financial, administrative, and artistic departments to align business functions in support of artistic
  projects. Spearheaded strategic planning initiatives for audience diversification, community education, and incubating
  young talent for 75<sup>th</sup> Anniversary rebranding campaign. Served as spokesperson, educator, and lecturer to colleges,
  businesses, sponsors, and community partners. Coordinated with volunteers from support committees and guilds to
  increase productivity in support of the organization in alignment with the mission. Managed Guild Home facility,
  including rentals, contracts, and events, liaising with contractors for the upkeep of the historic facility.
- Created and presented budgets, budget variances, financial statements, and financial forecasts for all Finance Committee and Board meetings. Authored policies for the collection, reporting, and remittance of for-profit sales tax within a non-profit structure. Oversaw annual financial audit and 990 preparations with external auditors and internal finance staff. Worked with the State to develop LED application process and audit procedures for seasonal applications and worked with State politicians to write new State resolutions to protect LED funding for non-profits. Developed internal structures for applying, tracking, projecting, and reporting income sources for LED tax credits.

# DEVELOPMENT, MARKETING, EXTERNAL RELATIONS:

- Instituted new donation policies, donor movement, and wealth screening for developing existing donors and finding new support. Modified existing individual donor levels to balance social benefits with educational and artistic access benefits to strategically develop desired future donor levels. Aligned support committee and special event donor levels with actual donor levels to decrease inter-association support cannibalization. Led expansion of giving programs supporting 75th anniversary milestone and beyond. Developed new outreach opportunities with local arts organizations and businesses partnered to cross pollinate audiences.
- Created and marketed New Orleans vacation packages centered around performances with local hotels within a 10hour drive market. Expanded funding possibilities for education by partnering with Loyola and LSU to create a summer arts festival for promising opera talent. Created artist roundtables and "Art's Chat" discussions for adult education to be shared online, both tools used for fundraising and building company exposure.

# CHORUS MASTER/ASSISTANT CONDUCTOR [Department Director] San Diego Opera

Department Director responsible for over 100 multi-cultural union employees in an organization recognized as one of the top 10 opera companies in the United States, showcasing international talent with a peak annual operating budget of \$18 million, employing 45 full time employees and approximately 600 seasonal employees.

# **OPERATIONS & FINANCIAL**:

- Received national and international critical acclaim for leading one of the top choruses in the United States
- Developed, implemented, and completed over sixty projects ahead of schedule and under budget.
- Prepared, projected, monitored, and balanced departmental budgets.
- Averaged over 14% departmental savings during tenure with average seasonal expenses more than \$600,000.
- Directly supervised and engendered strong employee relations with fair and expeditious dispute resolution.
- Processed, investigated, and arbitrated employee complaints, avoiding 100% formal grievance filings.

# DEVELOPMENT, MARKETING, EXTERNAL RELATIONS:

- Built strong relationships both with and among employees, board members, and external businesses.
- Actively involved the education department as a tool for development through outreach and public performances.
- Performed, spoke, and represented company at public fundraising events.
- Worked with teams of volunteers to build public awareness and outreach.

# ADDITIONAL EXPERIENCE

#### VICE-PRESIDENT & CO-FOUNDER TakelSolutions

 TakelSolutions
 San Diego, CA/New Orleans, LA

 Co-founded consultancy to provide and teach strategic operations, finance, analysis, organizational design, business and fund development, communications and marketing, and problem-solving skills to leadership of small businesses, non-profits, and startups.

# FINANCE & BUDGETING ADJUNCT PROFESSOR

# **University of New Orleans**

Taught concepts and analysis of capital and liquidity, budgeting, cash flow, fixed vs. variable costs, break-even, opportunity costs, balance sheets, income statements, SOX and FASB, securities and investments, chart of accounts, strategic growth, balanced scorecard framework, future vs. current value of money, cost-benefit, capital budgeting, short-term vs. long-term investments, and crafting internal control policies to undergraduate and graduate level students.

# ACCOUNTING ASSISTANT

**Financial Management Services-Indiana University** *Bloom Input and maintained account data for all 13 campuses of IU. Prepared and printed payroll for all campuses.* 

# **EDUCATION**

# SAN DIEGO STATE UNIVERSITY COLLEGE OF BUSINESSSAN DIEGO, CAMaster of Business AdministrationINDIANA UNIVERSITY JACOBS SCHOOL OF MUSICBLOOMINGTON, INMaster of Music, Majoring in Choral ConductingCAMERON UNIVERSITYLAWTON, OKBachelor of Music, Majoring in Vocal Performance. Graduated with honors.LAWTON, OK

#### 1997-2010 San Diego, CA

#### 2015-2018 New Orleans, LA

2008-Current

# **Bloomington, IN**

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1991-1994