



## Chief Advancement and Marketing Officer

Leadership Profile

June 2021



*WittKieffer*

## Executive Summary

Sarasota, Florida is one of the nation's fastest-growing metropolitan areas in the country and celebrated for its robust arts and culture offerings. The city is investing hundreds of millions of dollars upgrading its vibrant bayfront to accommodate this growth and provide a truly superior urban experience for a rich array of permanent and seasonal residents and visitors from all over the world. Central to this enormous project is the development of a world class major performing arts center.

The Van Wezel Foundation (aka, the Sarasota Performing Arts Foundation) is partnering with the city, other regional municipalities, private philanthropists and foundations to build and operate what will be the performing arts centerpiece of the bayfront master plan development project and the entire gulf coast region. To accomplish this ambitious goal, the Foundation seeks a chief advancement and marketing officer (CMAO) to drive this transformative legacy project and fundraising campaign.

The Foundation's aspirations are inspiring. The new performing arts center will be a public-private partnership in which the City of Sarasota and the Foundation will be the principal participants. Completing the project – construction, operations and programming – will require funding of more than \$275 million, of which 50% is anticipated to be raised from philanthropic sources. The quiet phase of this campaign is underway, and the effort is anticipated to require at least five years to complete. The result will be a resource for multiple and diverse communities at the heart of a rejuvenated urban landscape in one of the nation's most beautiful settings.

Success in this role requires an experienced and seasoned fundraiser with significant leadership experience in a major comprehensive or capital campaign. A personal track record of success as a major and principal gift fundraiser is required, and a record of success working with major foundations is preferred. The successful candidate will demonstrate experience leading strategic marketing and communications in pursuit of philanthropic investment.

As a member of the Foundation's executive leadership team and reporting to Chief Executive Officer, Cheryl Mendelson, the CMAO will work directly with high-profile board members and other volunteers; thus, experience working at this level of a complex and aspiring institution is required. Candidates who resonate personally with the arts will be at a decided advantage.

Seldom in one's career is there an opportunity to play a leadership role in such an expansive, impactful organization and project from the ground up. The chief advancement and marketing officer will make a seminal contribution to a cultural resource of greatest importance to a region of growing size and prominence.

Recruitment will continue until the position is filled. Information regarding the process for nominations and applications for this opportunity may be found near the end of this document in the section titled "Procedure for Candidacy."

## Opportunities and Expectations for Leadership

The following represent some of the immediate opportunities that the new chief advancement and marketing officer will address during the first two to three years in office. They are presented here in no particular order.

### Expanding the Donor Pipeline

At the core of Van Wezel Foundation's mission has been a three-decade commitment to support arts education and advocacy to diverse audiences. These initiatives touch the lives of more than 40,000 students, educators, and families across five counties.

The foundation's fundraising program has long been cyclically structured. Each year, the foundation raises \$2.5 million in philanthropic support from 300 individual and foundation donors. The highly-anticipated annual *Inspiration Gala* raised \$1 million in 2020, the most successful event in the organization's history. The 300-member *Friends Society* provides year-round privileges at the Van Wezel Performing Arts Hall that include concierge ticketing, premium seating, meet and greet opportunities with visiting performing artists, access to Friend's Founders Lounge and invitations to one-of-kind art experiences. Finally, the *Bravo Legacy Circle* honors those individuals who have included the Van Wezel Foundation in their estate plans.

While Van Wezel has successfully raised philanthropic dollars for a great many years, its donor demographic has remained largely regionally-affiliated, older prospects. This has created a very strong annual, events and planned giving program. Given the campaign's fundraising goals, the chief advancement officer must lead the strategic goals with the CEO to grow the donor base from a broader geographic footprint. Of greatest opportunity is that the current performing arts hall patrons themselves have largely gone unsolicited.

The existence of a very substantial amount of mined data analysis is available through the Raiser's Edge platform. *CCS Fundraising* consultants recently performed a wealth capacity screening and identified a strong pipeline of seven-figure gift prospects and are contracted to work with the Foundation team to integrate the annual and campaign fundraising programs. This combination of resources should provide a robust stream of "suspects" for pursuit. The chief advancement officer will create systems for communications and information tracking that enable the identification of prospects by staff, board and volunteers across the organization.

### Grow the Organization

The Van Wezel Foundation will grow dramatically in the course of the coming three years. The inaugural CMAO will oversee a retained marketing and ADVO communications firm, several vendor contracts and a team of four FTEs. The CMO will have a budget to build a high performance advancement and marketing team of 12 FTEs to provide a more robust suite of in-house services, supplemented with continued support from expert counsel.

The CMAO will have the opportunity to build a strong collaborative and collegial team from the ground up - tripling its size by FY23. Therefore, the CMAO must build, mentor and manage a growing team with strategy, coaching and close management. Foundational elements like performance metrics and

setting expectations must be established early and reviewed often, if the foundation is to be successful in their campaign pursuit.

### **Lead the campaign to success**

The first and most important challenge the CMAO will address is the campaign to build the Sarasota Performing Arts Center and to provide financial underpinnings for its programming. That effort is underway with those championing the project considering their commitments. This phase is anticipated to be completed in FY22. The leadership phase will follow for approximately three years, and two years of public phase will close out the effort. The current goal for *The Future is Now* campaign is \$200 million, broken down as follows:

- \$13 million in expendable support annually;
- \$165 million for construction of the facility; and
- \$25 million for endowment supporting both the facility and its programming.

The new CMAO will work closely with the Foundation's retained communications firm to develop and implement an advocacy plan for community engagement tailored to a wide range of constituencies. The CMAO will build a comprehensive brand marketing and strategic communications program that includes website and content development, brand awareness, social, digital and email marketing, digital and printed assets and public relations. The CMAO will develop the visual brand, case for support and integrated marketing and communications strategy to carry on the strong annual fundraising program already in place and the public launch of the Future Is Now Campaign. The CMAO will lead this effort in word and deed, building the capacity of the staff while at the same time playing a central role in prospect identification, cultivation, solicitation and stewardship.

### **Create an efficient and effective continuum between marketing and advancement**

Fundraising in Sarasota and the surrounding region takes a somewhat different approach than would be considered standard in much of the rest of the country. Because of the substantial impact of seasonal residents, many of whom have significant histories of philanthropy, the identification and engagement of prospects requires a varied approach. That and the Foundation is competing with more than 200 local non-profits adds to the singularity of the environment.

Specifically, fundraising "in season" in Sarasota provides unique opportunity to leverage the numerous special events and the quid pro quos that those events generate. Major special events are a weekly occasion, bringing philanthropists together who otherwise live – and support non-profits – all around the country and, indeed, the world. The proliferation of these events creates a series of intertwined donor relationships in which they impose upon one another to support each other's charitable causes by buying tables and otherwise making the events productive and profitable. From a marketing perspective, these events are therefore occasions to identify and engage with prospects and suspects, from which more typical major and principal gift cultivations and donor relations can derive. It is critical, therefore, that the fundraising efforts of the Foundation dovetail both marketing and advancement to take fullest advantage of this continuum.

Marketing and communications will also be responsible for more typical promotion of the Foundation's mission-driven projects and its programs to the public, and those activities will grow in volume and importance over time. Community engagement activities to educate and engender support for the

new PAC are critical to the success of the public private partnership. In the future, the Foundation's marketing and communication team will be charged with a broader array of responsibilities to include audience development and promotion of arts programming for the new PAC, but for the next several years that staff's efforts will be focused on the execution of the Foundation's strategic plan.

### **Play an active role in revenue generation beyond individual philanthropy**

Philanthropic support is only one part of the matrix of capital required to realize the promise of the arts center. While CEO Cheryl Mendelson will, of course, be the face of the Foundation to local governments and other potential partners, the CMAO will play an active role in these efforts if and when strategically appropriate. The CMAO will also supervise the Foundation's government relations strategy and any external advisors focusing on public funding support. Likewise, the building of the PAC, and the community programming in particular, fits the guidelines of several major local and national foundations, and the CMAO will play a central role in approaching those organizations for support.

### **Support the CEO and the Board of Trustees**

Like most entrepreneurial enterprises, the PAC project began as a personal passion for a small group of people, and its operations are growing from the ground up. Thus, CEO Mendelson and the current board have been carrying most of the water for the project from the outset. It is also an idiosyncrasy of fundraising in Sarasota that solicitations are typically staff-driven. It is incumbent upon the CMAO, therefore, to position the Foundation's executive and board leadership to use their limited time in the most effective and profitable way. To this end, the CMAO will build both strategies (from the outset) and the staff (over time) necessary to optimize their fundraising efforts.

## **Qualities and Qualification of the Ideal Candidate**

The new chief advancement and marketing officer for the Van Wezel Foundation will be a major and principal gift fundraiser of considerable skill and successful experience. Leadership experience in a comprehensive or capital campaign of considerable aspiration is required. Successful experience working with major organizational funders, especially national foundations, is highly preferred. As would be expected, the central skills and attributes of the successful fundraiser – including especially superior communication skills, outstanding relationship-building abilities and a superior understanding of human nature and motivation – are absolutely required, as are superior strategic skills.

Given the somewhat unusual nature of fundraising in Sarasota, the successful candidate must demonstrate a successful track record of working with marketing and communications in pursuit of philanthropic investment. In leading both marketing and communications and advancement, the CMAO will possess at least five years of successful leadership and managerial experience in an organization of equal or greater complexity. Because initially staff resources will be limited, the CMAO must be willing to roll up sleeves and accept a wide array of responsibilities both internal and external to the organization. The position requires attendance at major events and performances, including nights and weekends.

Experience working in concert with and staffing highly-placed board members and volunteers is required. Candidates with experience working with governments at the local, state or federal levels will be at an advantage in managing the Foundation's government relations specialist and outside counsel.

The ideal candidate will resonate personally with the Foundation's mission and, particularly, its focus on the performing arts. Previous experience with arts organizations will be an advantage. Required is a personal commitment to diversity, equity and inclusion within the workplace and in the populations who will be served by the performing arts center, along with the fundamental attributes of successful leadership, including unimpeachable integrity, outstanding judgment, prodigious energy, a laudable work ethic, courage of convictions, political savvy and a sense of perspective and humor.

## About Van Wezel Foundation

50 years ago, the City of Sarasota, with its rich history of art, culture and philanthropy, opened the Van Wezel Performing Arts Hall as a center of civic and cultural vitality.

Since 1987, the Van Wezel Foundation has partnered with the City of Sarasota to foster a connection between the city, the people, the bay and the spirit of human creativity. Through this collaboration and the generosity of donors, the Foundation has provided grants of more than \$14 million to ensure arts education training for more than 400 teachers, and arts education programming to more than 30,000 students and at-risk youth, across four counties, each year.



## Mission

To create and sustain a vibrant performing arts center, advance education and enrich communities by inspiring minds through the power of the arts.

## Arts Education for Children

The Van Wezel Foundation's generous donors commit themselves to strengthening the voices of tomorrow, through immersion in the dramatic arts, by providing a visceral learning experience. These programs build confidence and self-esteem, challenge and examine social perspectives, foster relationships through artistic collaboration, foster imagination and create empathy through storytelling.

- **Schooltime Performances:** Van Wezel Schooltime Performances presents high quality, nationally and internationally renowned artists and performances for area students. Each performance connects to Florida Standards through engaging, awe-inspiring performing arts.
- **Classroom Teaching Artist Visits:** Since 2019, Van Wezel has offered Art Work for Schooltime learning modules. These lessons are inspired by the Schooltime Performances, and connect arts disciplines to other curriculum in language arts, math, science, social studies and more.
- **Artworks Anywhere:** This free online service was developed in response to the pandemic with emphasis on serving parents, educators, caregivers, children and their growing needs. The initiative includes both live streaming and on-demand recordings of learning activities, including visual arts, dramatic play, story, explorations and more, all led by Van Wezel teaching artists.

- **Summer Learning:** The Summer Learning Academy provides six weeks of arts education, math and reading instruction, with the goal of combatting the "summer slide," the learning regression that takes place over the summer, especially among children from low-income families.
- **Family Literacy Nights:** Family Literacy Nights helps parents and caregivers connect with their children using drama, theater exercises and active learning, to help young participants build literacy skills, bringing the entire family together.
- **Students with Disabilities:** Very Special Arts (VSA), the international organization on arts and disability, provides arts and education opportunities for people with disabilities and increases access to the arts for all. Van Wezel is proud to bring this programming to serve more than 350 students a year, in five area schools. An ongoing partnership with local second graders provides opportunities for inclusion, and shared learning experiences for all students, with and without disabilities, to foster dialogue, creativity and an understanding of their peers.

## Professional Development

Van Wezel is proud to provide professional development activities, giving local educators the tools to continue their students' immersion into the arts as part of their classroom curriculum.

- **John F. Kennedy Center Partners in Education:** The School Board of Sarasota County and the Van Wezel Education Department partner for this prestigious program, bringing the finest arts educators to the community, to work directly with teachers on arts integration teaching methods.
- **Art Works Professional Development:** Van Wezel offers a series of arts based professional development opportunities for teachers, inspired by each Schooltime Performance. These free professional development opportunities are available to all educators, enhancing a teacher's ability to prepare their students for the performance, and providing strategies to continue education beyond attendance of the performance.

## Access to the Arts

Van Wezel's Access to the Arts initiative is a vital source of support for the community, opening the door to the performing arts for youth, seniors and individuals, with free and low-cost opportunities to see, experience and participate in live shows and events.

- **Total Access:** Total access provides local families with young children the opportunity to experience several live performances at the Van Wezel free of charge.
- **Arts for All:** The Van Wezel Foundation partners with dozens of local organizations that provide education, health and social services in the community, the opportunity to attend performances at deeply discounted rates. Partners include: Girls, Inc., Big Brothers Big Sisters, All Faith's Food Bank, The Pines, Easter Seals, Friendship Centers, SPARCC, Make a Wish and more.
- **Senior Access:** Designed to reach local seniors who might not normally have the ability to attend performances, Senior Access allows the Van Wezel to provide meaningful arts experiences and promote healthy aging, while encouraging social activity and life-long exploration of the arts.
- **Military Access:** Military Access honors current and past members of the military and provides opportunities for a therapeutic and engaging experience. The program gives veterans, active military and their families the experience of attending a professional live performance at no cost to them.

## A Vision for Sarasota Performing Arts Center (SPAC)

Nestled along the Sarasota Bay, the Sarasota Performing Arts Center (SPAC) will become an iconic, mission-based civic asset, serving the entire region for generations to come. In September 2018, the City of Sarasota approved a master plan initiative to transform 53-acres along Sarasota Bay into a new park and green space, with the Sarasota Performing Arts Center at the heart of it.

The 230,000 square foot structure will include a 2,250 seat main stage to present world-class productions, as well as a 400 seat venue for more intimate performances. A 10,000 square foot education and lifelong learning center will expand the impact Van Wezel's programs provide to the Sarasota community. The grounds will also have several outdoor performance spaces. SPAC will be a true community asset, improving the quality of life for generations, by fueling academic success and personal growth for children and their families; promoting wellness: body, mind and spirit; and enhancing civic pride throughout the region. The city and community's investment will create thousands of planning and construction jobs, and once open, SPAC will drive commerce to local businesses year-round, enhancing tourism, hospitality and property values, while stimulating new sources of revenue and investment. For more information about the vision for the Sarasota Performing Arts Center, [click here](#).



SPAC maintains essential partnerships with both the City of Sarasota and the Bay Park Conservancy (BPC) to collaborate on key aspects of this community-wide initiative. BPC assesses that the total park cost estimate is currently between \$100 – 150 million, not including the performing arts center. More information on the Bay Park Conservancy can be found [here](#).

## Leadership

### Cheryl Mendelson, Chief Executive Officer, Van Wezel Foundation

Cheryl Mendelson became the CEO of the Van Wezel/Sarasota Performing Arts Center Foundation in 2019, bringing over 20 years of experience as a nonprofit executive at renowned organizations in education, healthcare, arts and culture.

Mendelson served as Executive Vice President and Chief Operating Officer at the Harris Theater in Chicago's Millennium Park. She played a vital leadership role in the strategic vision for the Theater, building it a national reputation as a venue of artistic importance. Mendelson was responsible for leading the senior management team in all areas of operations, as well as earned and contributed income, including marketing, sales and philanthropy. Mendelson was the chief architect for the \$38 million Imagine Campaign, which achieved 60% of its goal in the first year. Her collaborative partnership with

the Theater's artistic director led to the development of innovative new programming, including the Exelon Family Series, MIX at SIX rush hour series, Beyond the Aria salon series with the Lyric Opera of Chicago, To The Edge, produced by Renee Fleming and the Chamber Music Society of Lincoln Center residency. Mendelson has been recognized as a thought leader in developing award-winning branding programs. She received three national marketing awards for the launch of the U.S. tour of the Paris Opera Ballet. Mendelson also pioneered new community engagement programs at the Theater. She founded Access Tickets, a program that partners with health and human service organizations and schools to provide access to visiting artists and underwrites performance tickets. In addition, she secured the first National Endowment for the Arts grant to establish the Harris Theater Learning Lab, a capacity building program to support the 35 resident music and dance companies who perform at the Theater.

Previously, Mendelson spent 13 years at the Rehabilitation Institute of Chicago (now the Shirley Ryan Ability Lab), the #1 rehabilitation hospital and research center in America. As Senior Vice President of Philanthropy, Marketing and Strategic Communications, Mendelson led campaigns that raised more than \$150 million to establish clinical and research programs. Additionally, she spearheaded pivotal PR initiatives that brought international attention to the groundbreaking research of the Center for Bionic Medicine, and the hospital's designation as the only private rehabilitation center to treat wounded soldiers. Mendelson and her team won six national PR awards for the Transforming Medicine – Transforming Lives Campaign, resulting in a \$100 million Department of Defense research collaboration.

Mendelson's career also includes executive positions in higher education, including Vice President of Institutional Advancement and Chief Marketing Officer for Erikson Institute. Erikson is the premier Graduate School in Early Child Development. It is also a national center in providing treatment and professional training in infant and child mental health, and applied research and advocacy to shape policy that positively impacts young children and families. Under Mendelson's leadership, Erikson successfully completed a \$58 million Impact and Influence campaign to fund new community-based services, build an endowment to support scholarships and invest in the development of innovative online academic programs to expand Erikson's reach globally.

In addition, she served as Director of the Annual Fund for the University of Chicago's Booth School of Business, during its \$70 million campaign to build the University's first Executive Education Center in downtown Chicago.

In 2016, Mendelson was named to the top 10 list of Musical America's 30 Professionals of the Year. She was also featured as a "philanthropic powerhouse" in the inaugural publication of *Chicago Woman* magazine, and she was profiled in *Sarasota* magazine's "Top Women of Influence." In 2020 Mendelson was also named to the Gulf Coast CEO Forum.

Mendelson received her BA from the University of Massachusetts at Amherst and completed the Management Institute Program at the University of Chicago, Booth School of Business.

## Board Leadership

**Jim Travers, Foundation Board Chair**

Jim Travers is an experienced senior technology executive with over 35 years of experience, having built high-growth technology companies in both the public and private sectors. He has led three publicly traded companies through high-growth phases, which resulted in significant outcomes for investors.

Mr. Travers currently serves as the Executive Director & Chairman of the Board for Motion Acquisition Corporation. Previously, he was Chairman and CEO of Fleetmatics, Inc. (NYSE:FLTX), a publically traded global software service company that operated in over 15 countries. Verizon, Inc. acquired Fleetmatics in 2016. Mr. Travers remains active with emerging technology companies, working with private equity partners as an investor and board member.

Earlier in his career he worked for Texas Instruments, Inc. for over 18 years, holding global senior executive positions in sales, marketing and general management.

Mr. Travers is also very committed to philanthropy. In addition to currently serving as Chairman of the Van Wezel Foundation/Sarasota Performing Arts Foundation, Inc., he has also served as Chair of the Foundation's Strategic Planning Committee. Mr. Travers is also actively involved in supporting the Special Operators Transition Foundation (SOTF), a 501(c)3 organization which facilitates the transition of military special operations veterans into executive level civilian position. His support has included spearheading a large corporate fundraising event for SOTF in Atlanta.

#### **Jenne Britell, Ph.D., Foundation Vice Chair**

Dr. Britell has served as a director of United Rentals, Inc. (NYSE:URI) since 2006, and as its non-executive Chairman since 2008. Since 2005, Dr. Britell has also served as a director of Quest Diagnostics Inc. (NYSE:DGX), including as a member of its Audit and Finance Committee. From 2000 through 2017, Dr. Britell served as a director of Crown Holdings, Inc. (NYSE: CCK), including as Chairman of the Audit Committee.

From 2001 to 2009, Dr. Britell was Chairman and Chief Executive Officer of Structured Ventures, Inc., advisors to U.S. and multinational companies. From 1996 to 2000, Dr. Britell was a senior executive of GE Capital. At GE Capital, she served as the Executive Vice President of Global Consumer Finance and President of Global Commercial and Mortgage Banking. From January 1998 to July 1999, she was President and Chief Executive Officer of GE Capital, Central and Eastern Europe. Before joining GE Capital, she held significant management positions with Dime Bancorp, Inc., HomePower, Inc., Citicorp and Republic New York Corporation. Earlier, she was the founding Chairman and Chief Executive Officer of Polish-American Mortgage Bank.

Dr. Britell served on a number of non-profit, arts-centered organizational boards, including the Santa Fe Opera, the Philadelphia Orchestra, Curtis Institute of Music, Brooklyn Academy of Music and the National Dance Institute (NDI) New Mexico. She has also served on the boards of the Council of Foreign Relations (CFR), The Smithsonian's Lemelson Center for the Study of Invention and Innovation (Advisory Committee) and the U.S.-Russia Foundation for Entrepreneurship and the Rule of Law (Chairman, Audit Committee).

Dr. Britell joined the Van Wezel Foundation/Sarasota Performing Arts Center Foundation Board in 2019. She currently serves as the Foundation Vice Chair and the Chair of the Strategic Planning Committee.

**Vern Chalfant, Foundation Treasurer**

Vern Chalfant is the former CEO and Executive Chairman of McLarens Global Limited, a global insurance services company. In 2004, Vern transitioned to this position through the successful merger of McLarens International Group Ltd. and Maxson Young Associates, Inc., of which he was President and Chief Executive Officer. During his tenure, through acquisitions, he led the company in organic business growth as one of the top three global companies in the industry.

Mr. Chalfant also held senior positions at companies including Fastrac Systems, Inc., American Banker Insurance Group and Chalfant Financial Services.

Mr. Chalfant holds a Bachelor's in Business Administration, Accounting from the University of Missouri, and an MBA from the University of Miami.

He joined the Foundation in 2019 and currently serves as the Treasurer of the Board and Finance Committee Chair.

**Michele Hooper, Foundation Board Member**

Michele Hooper is the co-founder of The Directors' Council, a firm which helps corporate boards increase independence, effectiveness and diversity. Ms. Hooper's 30 years of corporate board experience spans multiple industries, with an emphasis on audit, governance, finance and strategy. A highly regarded governance expert and business executive, she holds an MBA from the University of Chicago, and a BA in Economics from the University of Pennsylvania.

Ms. Hooper is currently a director for United Airlines Holdings and UnitedHealth Group. Previously, Ms. Hooper served on the corporate boards of Warner Music Group, PPG Industries, Target Corporation and Seagram Company.

Ms. Hooper is retired from the National Association of Corporate Directors (NACD), where she served as President of the Chicago Chapter. In 2017, she was recognized as Director of the Year by NACD.

Currently the Vice Chair of the National Board of the Smithsonian Institute in Washington, DC, Ms. Hooper is also a past Director of arts and culture organizations, including the Joffrey Ballet and the Economic Club of Chicago.

Ms. Hooper joined the Foundation board in 2021, and serves on the SPAC Strategy Committee. She will play a leadership role in the development of the Campaign Cabinet.

**Procedure for Candidacy**

Inquiries, nominations and applications are invited. For formal consideration, applicants should submit a resume and cover letter in response to the opportunities and expectations described within this leadership profile to [VWFCMAO@wittkiewer.com](mailto:VWFCMAO@wittkiewer.com). For fullest consideration, application materials should be received by July 9, 2021.

Confidential inquiries and questions may be directed to the WittKieffer consultants supporting this search  
– Dennis M. Barden, Melissa Fincher and Lauren Bruce-Stets – at 630-575-6930.

**[VWFCMAO@wittkieffer.com](mailto:VWFCMAO@wittkieffer.com)**

*The Van Wezel Foundation is an equal opportunity employer. We celebrate diversity and are committed to creating an inclusive environment for all employees.*