

Netlinks

January 2010



WELCOME TO THE NEW YEAR!

By George C. Ruotolo, Jr., CFRE, Chairman and CEO

The year 2010 will represent for Ruotolo Associates, our clients and the greater philanthropic community a measure of both opportunity and continued challenges.

We are all buoyed by the resiliency of our society and communities. We have seen some philanthropic efforts, along with the direction of nonprofits, begin to return to some sense of normalcy, and we look forward to 2010 and beyond with a renewed sense of purpose and vigor.

As always, I hope that this document provides both information and food for thought to our friends.



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TRENDS IN NONPROFIT GOVERNANCE

by Dr. Roger W. Raber

Former President and CEO

National Association of Corporate Directors



In recent years, there has been even more focus and attention given to organizational governance in the nonprofit sectors. The word governance is used to differentiate the work of the board from that of paid executives. The current trends in nonprofit governance are mostly driven by the many scandals that have shaken the private sector, in addition to the changing environment in which nonprofits operate. The question many nonprofit organizations are asking is

"How should our board function in this environment?"

Two recent surveys, one from the National Association of Corporate Directors (NACD) and the other from Guidestar, both report interesting trends affecting nonprofit boards. Overall, the current environment for nonprofit boards is characterized by a focus on board assessment, transparency and accountability, financial management, strategic planning, and fundraising.

The NACD Nonprofit 2009 Governance Survey asked respondents to first rate the importance of certain issues, and then rate their effectiveness in handling the issues. In other words, what issues are critical to your organization that you need to manage more effectively? The highest ranked issues that showed the greatest gap in effectiveness can easily be remembered as The 3 R's:

- **Relay- CEO Succession Planning;**
- **Reputation- Relations with the General Public;**
- **Risk- Risk and Crisis Oversight.**

In addition, the 2009 survey results suggest that organizational performance is also a concern. We might call this the ROI (Return On Investment) factor. The June 2009 Guidestar survey specifically reinforced the ROI message and the need of nonprofits to become more aware of what fundraising efforts have the greatest return. The survey details that 58% of respondents reported increased demand for their services, while 52% of respondents reported a decrease in contributions.

Upcoming Events



Ruotolo Associates Inc. is a working partner with non-profit organizations, providing them with the highest quality consulting for fund raising, stewardship, public relations and related management services through individualized creative strategies and solutions.

To learn more about the firm, visit our Web site at Ruotolo Associates.

UPCOMING EVENTS

Jan. 29-30, 2010

Episcopal Diocese of Newark, Robert Treat Hotel, Newark NJ

Feb. 21-24, 2010

Christian Brothers Conference, New Orleans, LA

March 5-6, 2010

Episcopal Diocese of New Jersey, Crowne Plaza Hotel, Cherry

The findings of both surveys reinforce the critical point that closing the demand-fund gap is a major challenge facing nonprofits today. Nonprofits more than ever should focus on operating differently to manage the increased demand for services with a decreased level of funding. Many nonprofit boards should rethink how they function and conduct business, in addition to providing the leadership and direction to not only sustain the nonprofit, but hopefully strengthen it.

In order to initiate the action steps necessary for nonprofit boards to operate more effectively and close the demand-fund gap, I encourage the board to conduct a thorough self- assessment and performance evaluation. This is especially relevant given the current economic environment, since each organization will need to redefine the roles and responsibilities of their board as it relates to their purpose, mission, governance model, and budgets.

Traditionally, the board's primary responsibility is to establish budgets and provide oversight and assessment of executive performance. However, as George C. Ruotolo, Jr., CFRE, Chairman and CEO of Ruotolo Associates, emphasizes, "given the economic and business environment today, boards have to be operating differently. They need to scrutinize the budgets and all revenue streams, including philanthropy. They need to ask what areas could be cut or eliminated without negatively impacting the mission of the institution or organization."

Ruotolo Associates works with nonprofits' boards to partner with them as they go through the assessment process. A comprehensive assessment review is vital to ensure that the board has the essential competencies and strategies to address the unique needs of their organization.

Once the board assessment process is complete, a board can then more effectively address other focus areas outlined in the NACD survey such as:

- **Transparency, Accountability and Financial Management:** Nonprofits must have an ethical obligation to their members, donors and the public. Nonprofits must comply and disclose all legal financial requirements and accounting principles/practices. This strengthens fiscal responsibility and the public trust. Critical questions to ask: *Do we have established best practices--financial and others? Are we prepared to manage risk or a crisis? What cost-cutting can occur without detracting from our mission? Do we have a conflict of*

Hill, NJ

April 11-14, 2010

The AFP 47th
International
Conference on
Fundraising, Baltimore
MD

June 11, 2010

Fund Raising Day in
New York, Marriott
Marquis, Times Square

Sept. 19-22, 2010

National Catholic
Development
Conference, Marriott
Chicago Downtown,
Chicago, IL

Sept. 19-22, 2010

International Catholic
Stewardship Council,
Marriott Hotel, San
Diego, CA

interest policy?

- **Strategic Planning and Board Management:** Nonprofits must manage their boards effectively and be open to strategic alliances. Critical questions to ask: *What is the board self-assessment process? How do we measure performance; do we have established goals and timelines? What is the recruiting method to bring new talent onto the board? What is the process for continued education and training for the board? What are the term limits for board members? How well does the board participate in philanthropic efforts? Do we have a succession plan for the CEO or Executive Director? What is the board's relationship in marketing and public relations? Do we have a 3-5 year strategic plan?*
- **Fundraising:** Nonprofits' fundraising must be conducted according to the highest ethical standards. Critical question to ask: *Does your board have a strategy to participate, review, and implement which fundraising efforts bring in the greatest return?*

While economists differ on when the recovery will be in full force, most agree that our economy will not recover rapidly. The nonprofit economy usually lags behind any recovery in the regular economy, so nonprofit directors will need to continue to focus on effectiveness. Nonprofits are operating in challenging times- reduction in budgets, increased demand for services, decreased contributions, and overall doing more with less. Governance of nonprofit organizations has become more complex, and although challenging, it is also an opportunity to look at the current trends and ask "Are we ready?"

Ruotolo Associates has worked with over 1000 nonprofits and we look forward to partnering with you so that your nonprofit is ready to function in this tough economic environment.

Roger Raber serves as Senior Counsel for Ruotolo Associates. He is the immediate past President & CEO of the National Association of Corporate Directors. NACD is the only professional organization devoted exclusively to providing information, research, and education for corporate directors and boards. Prior to his appointment to NACD, Dr. Raber was Director of Member Services for America's Community Bankers (ACB) in Washington D.C., and President of ACB's Center for Financial Studies. He can be reached at Ruotolo Associates, 201-568-3898.

CHARITY REGISTRATION LAWS DID YOU KNOW...

By Tony Martignetti, Esq.

Managing Director

Martignetti Planned Giving Advisors, LLC



The end of the year is traditionally a very productive period for philanthropy as many donors share in the gift giving spirit of the season. Donors may be opening their wallets or, for many, their laptop. Nowadays, most charities have some form of online fundraising program to complement and enhance their overall marketing and development plan.

Development professionals are thrilled to utilize the internet as a tool to broaden and diversify their potential pool of donors. Yet, there is a caveat...the use of online fundraising comes with additional legal responsibilities of which you may not even be aware.

Those who manage charitable organizations take very seriously their commitment to operate the nonprofit with the highest degree of ethics and transparency and certainly within the law. However, many charitable organizations may be ignoring charity registration laws which could be putting their board and their nonprofit at risk.

Until this year, nobody really cared about registration laws, but the IRS has stepped in with its revised Form 990. The new Form 990 asks specific questions about nonprofit compliance with state charity registration laws. An officer signs your 990 under penalty of perjury. The new Form 990, coupled with recent enforcement actions, should be more than enough reason for your nonprofit to take notice of registration laws.

YOU ARE REQUIRED TO REGISTER IN STATES WHERE YOU SOLICIT

Your instant response may be "no problem, my charity is located in Massachusetts and it is registered in MA." However, the likelihood that you will raise money not only within Massachusetts, but in the multiple surrounding states or even across the country, increases with the use of online fundraising, social media, and a good marketing

strategy.

Every state considers paper mail, telemarketing and advertising that seek donations, to be a solicitation. If you are sending donation requests through the Postal Service and/or email, then you need approval from officials in the states where the post mail or email is delivered. In states like Arizona, Florida, Georgia, Illinois, and New York, the mere existence of a "Donate Now" button on your website triggers your registration requirement. Additionally, if you're inviting people to your website with email, Postal Service, telemarketing, ads, events or meetings, you'll need to register in other states.

Registration laws vary from state to state, so unfortunately there is no "one registration fits all," but compliance isn't complicated, just time consuming.

GETTING STARTED WITH A COMPLIANCE PLAN

1. Register in your own state
2. Analyze your solicitations- look at where you solicit the most:
 - If you get all of your donations from just a few states, put a disclaimer on your website donation page stating that you only accept donations from those states, and then register in those states;
 - If you are accepting gifts from many different states, start with the most populous states, for example, California, and work your way down, registering state by state.
 - TIP: Limiting the states that can donate to your charity online will save you considerable time.
3. Query your database- if you are fundraising by paper mail, email, phone, advertisements and meetings, then:
 - Query your database for your constituents' states of residence;
 - Rank the output file by descending frequency of constituents;
 - Register in the states in which you do the most solicitations first and work your way down.
 - TIP: A lot of states have exemptions which vary based on mission, gross revenue, fundraising revenue, and in-state revenue so your charity may be exempt.

Eventually, with time devoted to a few states per month, you will get your nonprofit into compliance. Compliance with the laws in every state you solicit will protect your organization's reputation, your board members, your donors, your relationship with the IRS and your officers.

Tony Martignetti, Esq., is the Managing Director of Martignetti Planned Giving Advisors, LLC, and is the author of the recent book "Charity Registration: State-by-State Guidelines for Compliance." He can be reached at tony@mpgadv.com. You can also visit his website www.StateCharityRegistration.com for an instant download of "Charity Registration: State-by-State Guidelines for Compliance."

INCREASING CHARITABLE REVENUE IN UNCERTAIN TIMES: THE ROLE OF REAL ESTATE, ART, AND OTHER NONCASH ASSETS AS AN IMPORTANT SOURCE OF CHARITABLE REVENUE

By Caroline Camougis

Managing Director
Delphi Partners



The Fundraising Challenge

Blaming the economy on decreasing charitable revenue is an obvious - and easy - explanation. But consider the following:

- Less than five percent of this country's wealth is in cash.
- The average donor has the majority of his/her net worth in noncash assets such as real estate, closely held stock, art and other personal property.
- Gifts of noncash assets to nonprofits are the fastest growing gift category.

Today, a three-fold challenge confronts nonprofit organizations and educational institutions: 1) to compensate for declines in traditional forms of donations, such as cash and securities, 2) to increase the number of donors who make major and planned gifts, and 3) to find a source of funding that will counteract stock market volatility and ensure more stable growth in funds and endowments. The answer to the challenge is to develop a comprehensive fundraising program for noncash assets. This article will mostly focus on gifts of real estate; however, gifts of closely held stock, art and other personal property are also an increasingly important source of charitable revenue.

Why Gifts of Real Estate are Important

Real estate is a large component of the U.S. economy and comprises a significant percentage of household net worth. According to the National Association of Realtors:

- Privately held real estate in the U.S. is estimated to be worth more than \$24 trillion.
- 1 out of 25 people owns three or more properties; 1 in 10 owns two properties.
- Investment (21%) and vacation home (9%) sales accounted for 30% of all residential sales in 2008.

Real estate accounts for a major part of household net worth and its value continues to increase, providing a major opportunity for nonprofit organizations.

Gifts of real estate are major gifts. Major gifts help validate an organization, provide a unique opportunity for a donor and instill confidence in other donors, and, they are the most efficient form of fundraising. While annual giving programs typically generate only 50 to 60 cents on the dollar, major and planned giving programs that include real estate generally cost a few cents for each dollar raised. One donated property worth \$174,000 (the 2009 YTD median house price) can defray a year or two of expenditures for newsletters, direct mail programs, and other fundraising efforts.

Organizations and donors both benefit when real estate is gifted - the donor through financial, tax and other benefits, the nonprofit through additional revenue. The January 2006 issue of *Planned Giving Today*, reported on a 2005 survey conducted by the Planned Giving Group of New England on trends in real estate gifts. The survey asked: What most motivates real estate donors to give to your institution?

- 64% cited the availability of tax deductions
- 62% cited the relief from the headaches of owning and managing real estate
- 60% cited charitable intent

The types of properties offered for donation vary widely, from single family homes, apartments, condominiums and cooperatives, to undeveloped land and commercial properties such as office buildings, shopping centers and farms. It is up to the organization to decide what types of properties and under what condition real estate gifts will be accepted. Such parameters should be clearly laid out in a comprehensive Gift Acceptance Policy.

Asking for Real Estate in Three Easy Steps

As noted above, one out of every 10 of your donors is likely to own two properties, and one out of 25 of your donors is likely to own three or more properties. Yet many may not be aware of the benefits that come from donating real estate, or that your organization accepts these gifts. To tap into the more than \$5 billion in real estate gifts donated annually, follow these three steps:

- 1) Understand the benefits
- 2) Ask the right questions
- 3) Develop a customized pitch strategy

1. Understand the Benefits

Gifts of real estate provide significant financial and tax benefits to donors. Depending on the form of the gift, donors can potentially:

- Avoid capital gains taxes due to a property sale
- Reduce income taxes
- Reduce estate taxes
- Eliminate the burden of maintaining and paying for property
- Make an asset the basis of a trust that provides income
- Take advantage of an alternative way to support the organization or fulfill pledges

- Create a significant legacy

Make donors aware of these benefits and encourage them to speak with their legal and tax advisors about the benefits of making a gift of real estate.

2. Ask the Right Questions

To find out about a donor's potential to gift real estate, ask these questions:

- **Do you own a property that you don't use very often?** *Are you travelling to the same extent you once did? Do you have a vacation home that isn't visited as much as it once was?*
- **Do you have real estate that is difficult or expensive to manage?** *Are you devoting more time and financial resources to maintaining a primary residence, vacation home or investment property than you would like?*
- **Will you owe significant taxes if you sell?** *Do you own property that has significantly increased in value?*
- **Do you have a substantial taxable income that a gift of real estate might offset?** *Are you seeking opportunities to offset your taxable income?*
- **Would you be interested in making a gift that would provide you with income?** *Did you know that a trust created with a gift of real estate can provide annual income?*

If the answer to any of these questions is "yes," a gift of real estate may be the perfect way for your donor to make a major gift.

3. Develop a Customized Pitch Strategy

- **A gift of real estate is a major gift.** *Learn your donors' needs and objectives and refine your pitch accordingly.*
- **Many donors won't be familiar with the potential benefits a gift of real estate can provide.** *Get them thinking, then come back with financial illustrations that compare the financial and tax benefits of various gift plans.*
- **A blended gift can help you reach your development goals.** *Ask for a major gift made up of cash and real estate. Donors may not have enough cash to meet your ask, but they may have property that can be combined with cash for a blended gift.*
- **And most important, Ask! The number one reason donors**

make major gifts is because they are asked. *Remember, donors are flattered to be asked for a major gift. Give them the opportunity to support your organization in a way that is also beneficial for them.*

Gifts of real estate or other noncash assets are an untapped opportunity for nonprofit organizations, and can be viewed as "found money." The person donating a \$500,000 condominium in Florida would not or could not write a check for an equivalent amount. The current economic climate is ideal for donations of property - to hedge against economic uncertainty, your donors are holding on to their cash and reducing expenses. Taxes, insurance and other carrying costs for real estate constitute a major expense. So no more reasons to delay! Start speaking with your donors about gifts of real estate. You will be able to increase your charitable revenue and offer your donors a way to reach their philanthropic potential.

Caroline Camougis is the Managing Director of Delphi Partners (www.delhipartners.com) a leader in advisory and disposition services for gifts of noncash assets such as real estate, art and other personal property. Based in New York City, the company operates domestically and internationally and serves the nonprofit, educational, financial and legal communities, as well as private clients. She can be reached at info@delhipartners.com.

STAFF NEWS

Ruotolo Associates is honored to congratulate Joseph J. Caporale, CFRE, President and COO, and Diane Corigliano, Office Manager, for celebrating 20 years with the firm.

Joseph "Jay" Caporale has done every job within Ruotolo Associates. Jay possesses a unique combination of intelligence, wit, perseverance and creativity which he has consistently demonstrated over the past two decades. Jay joined Ruotolo Associates in 1989 with a background in community relations and volunteer coordination. He has directed institutional capital campaigns and feasibility studies, designed and implemented school development programs, and conducted parish campaigns throughout the five

divisions of Ruotolo Associates. His expertise includes capital campaigns, strategic planning and development office operations with a special emphasis on board development and major gifts. "Jay is my friend and business partner in leading Ruotolo Associates. It has been my pleasure to watch Jay's progression from an associate with the firm to the level of President and Chief Operating Officer. His growth is a testament to his effective communication and superb work. I applaud Jay and his commitment to philanthropy and the aims and purposes of Ruotolo Associates" said George C. Ruotolo, Jr., CFRE, Chairman and CEO of Ruotolo Associates Inc. We congratulate Jay, his wife Martha, and their sons Jake, Luke and Dylan.

Diane Corigliano wears many hats in her role as Office Manager for Ruotolo Associates. In addition to serving as the primary liaison to our clients for contractual issues and procedures, Diane oversees all of RA's business proposals. Diane's talent is most evident in the professional style and content of the proposals. As George C. Ruotolo, Jr., CFRE, Chairman and CEO of Ruotolo Associates stated, "It is because of Diane's attention to detail and unyielding commitment to providing the best service to our clients that RA's proposals are so well respected throughout the industry." Diane provides a vast knowledge of corporate history. "Her support and knowledge assists the entire executive staff in providing the best service to our clients," said Jay Caporale, CFRE, President and COO of Ruotolo Associates.

Both Jay and Diane are a credit to the firm and the broader philanthropic community.

Martha Caporale Receives Tim Manning Award

At Ruotolo Associates' annual holiday celebration, Martha Caporale, wife of Joseph J. Caporale, President and COO, received RA's Tim Manning Culture of Excellence Award for outstanding support on behalf of the firm. "In order for a firm to ultimately succeed, it takes the support and commitment of a lot of people who don't necessarily work for RA yet play a critical role in the advancement of the firm. This year it was my honor to present the Tim Manning Award to Martha for her many years supporting Jay in his role at RA and his significant time and service to the firm," said George C. Ruotolo, Jr., CFRE, Chairman and CEO of Ruotolo Associates Inc. Martha is a graduate of Merrimack College and holds a Masters Degree in Education from Tufts. She works in the North Andover school system. Martha, Jay, and their three sons live in North Andover, Massachusetts.

PRESENTATIONS BY RA STAFF

Archbishop Dolan Luncheon, NYC, New York
by Joseph J. Caporale, CFRE, President and COO of Ruotolo Associates



On December 1, 2009, I had the privilege of attending a memorable event that I would like to share with our readers. His Excellency, The Most Reverend Timothy Michael Dolan, Archbishop of New York, was guest of honor at a private luncheon for over 300 distinguished New Yorkers. George C. Ruotolo was given the unique privilege of introducing Archbishop Dolan.

George shared the life story of the Archbishop. He was born in St. Louis and is a product of Catholic Schools with his seminary training culminating at the North American College in Rome. He was ordained to the priesthood in June 1976 and was first named a Bishop on the 25th anniversary of his ordination to Priesthood. He was appointed Archbishop of Milwaukee on August 28, 2002, and named Archbishop of New York on February 23, 2009, by Pope Benedict XVI.

The luncheon provided a unique opportunity for the Archbishop to share his perspective on his ministry and vision for the Archdiocese of New York. He reflected upon his new position as spiritual leader of the 2.5 million Catholics of the Archdiocese. He spoke about the early beginnings of the Catholic Church in different civilizations from Ancient Rome through today. He shared his view for a continued partnership between the Archdiocese of New York and the greater NY community. In addition to the network of churches throughout the Westchester, Dutchess, Putnam, Ulster, Rockland and Sullivan counties of the greater NY area, a partnership exists which provides social and human services, special and traditional education, along with a network of hospitals and health related programs serving millions of New Yorkers. The New York Catholic Church still recognizes the need to provide further assistance in assimilating and educating immigrants that

continue to be part of the fabric of the New York experience.

Archbishop Dolan demonstrated a sense of compassion, humor and vision that was thoroughly impressive. As he said, "People think of us as the Church of no-no and I want us to be known as the church of YES, YES." For all present, it was truly a meaningful afternoon.

Association of Fundraising Professionals of Northern New England, Burlington, VT

On November 6, 2009, Jay Caporale, CFRE, President and COO of Ruotolo Associates, presented a workshop, "Creating Gifts over \$10,000." Successful development programs require the identification, cultivation and solicitation of major gifts. The workshop discussed the steps to design and implement a comprehensive development program with the emphasis on securing major gifts. Topics discussed in the workshop included major donor identification, cultivation events, "the art of the ask," naming opportunities, acknowledgement of major donors, thank you events, and communication with major donors.

National Catholic Development Conference, Arlington, VA

Jay Caporale, CFRE, President and COO of Ruotolo Associates, on September 21, 2009, presented a workshop on practical planning. The workshop, "It Wasn't Raining When Noah Built the Ark: The Importance of Practical Planning," provided information and best practices in development unique to elementary and secondary Catholic schools. The session dealt with integrating a school's existing plans, assessing and filling any omissions in them, and developing action plans.

Theresa A. Shubeck, Executive Vice President of Ruotolo Associates, also presented at the NCDC conference. On September 21, 2009, Ms. Shubeck facilitated a workshop for parishes that demonstrated how to maximize the value of strategic planning as it relates to philanthropy. The workshop, "Strategic Planning for Successful Catholic Parish Fundraising," addressed issues that included the importance of strategic planning to significant donors, identifying and prioritizing the short and long-term needs of the parish in view of gift support, and adapting to change in an uncertain economy.

Ruotolo Associates' Webinar

On June 24 and 26, 2009, George C. Ruotolo, Jr., CFRE, Chairman and CEO of Ruotolo Associates Inc., hosted a webinar, during which he provided an overview of the 2008 giving analysis. The Giving USA Foundation released in early June the 2008 figures of charitable giving. These are among the most eagerly awaited statistics since Giving USA Foundation began tracking data and trends more than 50 years ago. Mr. Ruotolo presented an in-depth analysis of this important charitable giving information and reviewed how it could affect an organization's philanthropic plans.

Additional Presentations

November 17, 2009

Association of Fundraising Professionals- Mass. Chapter
Boston, MA

Title: Roundtable Discussion, Major Gifts, Creating Gifts Over \$10,000

Presented by: Jay Caporale, CFRE

November 12, 2009

Association of Fundraising Professionals- NJ Chapter
Parsippany, NJ

Giving USA's study on giving during recessions and economic slowdowns

Presented by: George C. Ruotolo, Jr., CFRE

September 15, 2009

Webinar: Giving USA -- The Annual Report on Philanthropy for the Year 2008

Presented to: The Archdiocese of Boston

Presented by: George C. Ruotolo, Jr., CFRE, and Jay Caporale, CFRE

September 13, 2009

Partners for Sacred Places- Lutheran Synod, Milwaukee, WI

Title: Funding Your Vision with Internal Fundraising

Presented by: Pamela J. DeLuca, CFRE, Director, Church Division, RA

August 14, 2009

Association of Fundraising Professionals- Mass. Chapter
Title: A Capital Campaign Case Study
Presented by: Jay Caporale, CFRE

June 15 - 17, 2009

National Catholic Development Conference
Leadership Conference, Chicago, IL
Title: Building the Road to Recovery
Discussion of the major issues related to raising funds for
Catholic nonprofit organizations in the midst of the largest U.S.
financial crisis since the Great Depression.
Presented by: George C. Ruotolo, Jr., CFRE

June 3, 2009

International Catholic Stewardship Council
Title: Fundraising in Challenging Economic Times:
Philanthropy and the Economy
Presented by: George C. Ruotolo, Jr., CFRE, and Pamela
J. DeLuca, CFRE

CURRENT CLIENT LISTING AND SERVICES PROVIDED

Alternatives for Battered Women, Rochester, NY: *Capital Campaign*

American Red Cross-Jersey Coast Chapter, Tinton Falls, NJ:
Development Program Counsel

Archbishop Stepinac High School, White Plains, NY: *Capital Campaign Counsel*

Arlington Catholic High School, Arlington, MA: *Planning Study and Capital Campaign*

Bishop Loughlin Memorial High School, Brooklyn, NY:
Development Program Assessment

Blessed Stephen Bellesini, O.S.A. Academy, Lawrence, MA:
Capital Campaign Counsel

Boyden Library, Foxborough, MA: *Feasibility Study*

Capuchin Franciscan Friars, Union City, NJ: *Major Gifts Campaign*

Christ Church, Andover, MA: *Capital Campaign*

Community Blood Services Foundation, Oradell, NJ: *Feasibility Study*

Dominican Fathers, Province of St. Joseph, NY, NY: *Advancement Program Counsel*

Dominican Nuns of Summit, Summit, NJ: *Feasibility Study and*

Capital Campaign Counsel

Franciscan Friars, Holy Name Province, NY, NY: *Major Gifts Campaign*

Guardian Angel Parish, Allendale, NJ: *Capital Campaign*

La Salle Academy, New York, NY: *Planning Study*

La Salle College High School, Wyndmoor, PA: *Campaign Assessment*

Leicester Public Library, Leicester, MA: *Feasibility Study*

Maryknoll Sisters of St. Dominic, Inc., Maryknoll, NY:
Development Program Assessment

Morris Habitat for Humanity, Mine Hill, NJ: *Development Program Assessment, Board Retreat, Executive Search*

Niagara University, Niagara, NY: *Campaign Counsel*

North Shore Community College, Danvers, MA: *Major Gifts Counsel*

Norwalk Hospital Foundation, Norwalk, CT: *Development Program Assessment, Feasibility Study, Capital Campaign*

Our Lady of Perpetual Help Parish, Bernardsville, NJ: *Campaign Counsel*

Project Morry, White Plains, NY: *Feasibility Study*

Ronkonkoma Cenacle, Inc. (Cenacle Retreat House), Ronkonkoma, NY: *Planning Study and Major Gifts Campaign*

St. Helena's Parish, Edison, NJ: *Capital Campaign Counsel*

St. John Neumann Parish, Lancaster, PA: *Feasibility Study and Capital Campaign*

St. John's Episcopal Cathedral, Denver, CO: *Feasibility Study and Capital Campaign*

St. Katharine Drexel Parish, Sugar Grove, IL: *Strategic Plan, Planning Study and Capital Campaign*

St. Raymond High School for Boys, Bronx, NY: *Planning Study, Development Assessment and Capital Campaign*

The Central Association of the Miraculous Medal, Philadelphia, PA: *Direct Mail Program Assessment*

Trinity Montessori School, Inc., East Rochester, NY: *Capital Campaign*

Wareham Library Foundation, East Wareham, MA:
Strategic Thinking Session and Annual Appeal

West Bergen Mental Healthcare, Ridgewood, NJ: *Capital Campaign Counsel*

Westwood Public Library, Westwood, MA: *Feasibility Study and Capital Campaign Counsel*

YCS Foundation, Inc., Hackensack, NJ: *Development Program Assessment, Board Retreat, Development Counsel*

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visit [our Church Division site](#).

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