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Articles and Advice to Advance Your Mission

By George C. Ruotolo, Jr., CFRE, chairman and chief executive officer



This spring marked the third anniversary of our firm's quarterly electronic newsletter, *Netlinks*. We hope you have enjoyed reading this publication and learning more about RA and the non-profit world in which we work as much as we enjoy putting together each issue. I view this publication as an excellent way to open a dialogue with our readers, and I encourage you to e-mail me (gruotolo@ruotoloassoc.com) with any suggestions or comments you might have about a topic you've seen in an issue or one that you would

like to see us address.

During the past few years, we have presented a wide range of topics in *Netlinks*. Included were articles about philanthropic issues, most recently sharing information about the Pension Protection Act and trends in giving. We also have focused on board and governance issues and strategic planning, topics that we found were of interest to many of our clients in recent years. (To view a directory of articles, click on www.ruotoloassoc.com/newsletter/index.htm.) We also have shared with you our client successes. We have enjoyed celebrating the triumphs that result from the collaboration of our employees with non-profit boards, volunteers and staff.

A regular feature in this publication is the staff profile, where we highlight consultants in our firm. I am proud of the strong backgrounds of our professionals as well as the hard work they devote to Ruotolo Associates' clients every day. The profiles provide an opportunity to showcase our team, a fine group of people who have dedicated their careers to improving the world in which we live through their consulting work with non-profit clients as well as the volunteer work they all actively pursue in their "spare" time.

Please contact us and let us know what else you might want to see in an upcoming *Netlinks*. We'd like to share our expertise to ensure that all non-profits can serve their constituents to the best of their abilities.

Technology Aids Notre Dame High School's Fundraising Initiatives

By Joseph (Jay) Caporale, CFRE, president and chief operating officer
Notre Dame High School Class of 1983

Reaching out to an increasingly computer-savvy alumni group is one reason Notre Dame High School in Connecticut decided to integrate "Internet relations" into its development program.

"We wanted to try to stay ahead of the curve and implement current technologies that are available," said Stephen H. Kirck II, director of alumni relations and communications at the school. "Additionally, students are using new technologies in the classroom, and they will expect us to utilize those technologies when communicating with them after graduation."



Notre Dame High School decided to launch an electronic communications initiative after the results of a development program assessment conducted by Ruotolo Associates. The firm, which has worked with the high school on three different occasions, encouraged Notre Dame to develop a comprehensive list of e-mail addresses to communicate with constituents. This would allow Notre Dame to complement its print materials with cost-effective, timely electronic messages that could be used to send "news flashes" to supporters, as well as updates and other key announcements.

Additionally, Ruotolo Associates encouraged the school to launch a secure online giving program through the NDHS website.

Both the e-communications and online giving program have been extremely successful. Notre Dame High School now has a regular schedule of electronic publications:

- A welcome back note in September provides general facts about the school: number of students enrolled, towns represented and schedule of events.
- In December and June, an electronic newsletter is sent to donors and alumni, which will complement a new, four-color magazine that will be published in September and March.
- A holiday greeting is sent in December. Last year's "card" featured pictures from the first four months of school.
- An announcement of the annual Knights of Honor dinner, the school's Alumni Association event that pays tribute to individuals who have brought distinction to Notre Dame as alumni, faculty or loyal friends.

Notre Dame High School also utilizes electronic communications to provide information about sports' scores, school happenings and event invitations. Many of these messages end by reminding recipients about the availability of the online giving capability through the website. Online giving has been highly successful, with gifts received online during the first week covering the first two years of the service contract for this functionality. The school continues to see the number of donations made through the website increase each year.

Mr. Kirck is dedicated to continual expansion of the Internet relations program in the coming years. He sees the biggest potential for growth in securing more e-mail addresses for the school's constituents. "Right now, we have valid e-mail addresses for about 30 percent of our alumni, a percentage we expect to increase dramatically when our next Alumni Directory update occurs in 2008," he said.

Benefits of a Development Assessment

By Theresa Shubeck, senior vice president



Decades ago, Ruotolo Associates decided to use the term “assessment” when looking at the strengths and challenges of development/advancement programs. At the time, many of our competitors were conducting “audits,” a term sure to strike fear in most people. Anyone who has ever received a letter from the IRS immediately begins to think of receipts and information that may not be readily available. Rather than evoking the panic and fear the phrase audit can conjure, Ruotolo Associates’ assessments generate positive feelings by celebrating accomplishments of fundraising activities. We then provide specific advice and action steps that address why a development/advancement program may not be as productive or philanthropically satisfactory to an organization as needed. The goal of the assessment is to migrate a development program to the next level in an accelerated manner.

During an assessment, a member of Ruotolo Associates’ staff will interview many individuals who are involved with development/advancement activities, including key administrators, board members, office staff and volunteers. In addition, we analyze all components of the fundraising program by:

- Reviewing job descriptions, organizational charts and past reports and agenda items from meetings with boards and development committees.
- Examining current and past goals to see if they have been achieved, or, if not, the reason for not meeting the objectives.
- Evaluating the effectiveness of the annual appeal, major gifts program, foundation and corporate research and proposal preparation.
- Assessing the timelines of different program components, as well as a comprehensive timetable to determine if action items and tasks have been identified and scheduled to ensure a successful result.
- Looking at volunteer structure and training. Many times, we have discovered that organizations recruit volunteers, including board members, without specifying what their role in the organization will be.
- Studying printed and electronic communications to ensure a consistent look and theme in the presentation of materials.

Ruotolo Associates also provides a confidential report to the non-profits’ chief executive officer that shares our evaluation of the attitudes, competency, work ethic, skill set and potential for growth of the development/advancement professionals and volunteers who are raising money for an institution.

One of our most common findings is that many organizations need to develop more effective strategies to establish a major gifts program when a capital campaign is not in progress.

If you would like to know more about how an assessment might benefit your organization, please feel free to e-mail me at tshubeck@ruotoloassoc.com.

Staff Highlights

Profile of Doug Held, Associate

Doug Held has 16 years of experience in non-profit management, communications and development. His background includes public relations, grant writing, annual and capital campaigns and strategic planning.

Doug's work in the firm's Mid-Atlantic region has included assessments of development offices, planning studies, capital campaigns and major gift initiatives. For New Jersey SEEDS, an academic enrichment and leadership development program aimed at eliminating social and economic barriers for high-achieving, low-income youth, he directed a successful executive search while leading the development operation for an interim period. Within our Church Division, Doug has helped clients implement stewardship programs.



“I enjoy being a consultant in the non-profit sector because of the diversity of focus areas and missions that our clients represent. I've always been interested in both the wide range of challenges that our society faces and the truly creative responses that non-profit institutions offer,” said Doug. “Each organization has a unique vision, culture and environment, and discovering how I can help clients meet their needs in fundraising, board development, strategic planning and other services is a very rewarding challenge.”

Doug's current projects include working with the Education Office of the Diocese of Brooklyn to implement a new, diocesan-wide governance model for elementary schools; conducting a capital campaign for Archbishop Stepinac High School in White Plains, N.Y.; and creating a comprehensive development program with a major gift initiative at Queen of Peace High School in North Arlington, N.J. He is providing marketing and public relations support for Randolph Township Library to seek a referendum vote for the construction of a new library. He also guided the building fund campaign of Mu Alumni Association at Stevens Institute of Technology, the firm's first college fraternity client.

“Along with his wealth of experience, Doug brings tremendous commitment and enthusiasm to our clients,” said Theresa Shubeck. “He is extremely adept at fostering positive relationships with all constituents to ensure a successful outcome.”

Doug began his career with a focus on vocational training within the social service sector. As a program manager and then department director, he wrote successful government grants, created and edited agency newsletters, developed revenue-earning small businesses and achieved a first national accreditation. Doug also implemented quality assurance programs and promoted community outreach through participation in the Rotary and Chamber of Commerce.

At Tribeca Performing Arts Center in New York, Doug expanded his grant writing to include corporate and foundation solicitations, initiated an annual campaign, created audience development strategies and assisted in board recruitment and training. Following the tragic events of 9/11, he was responsible for securing economic recovery funding and participated in Tribeca Organization (TO), a newly formed coalition of local businesses and community leaders.

Doug graduated from the University of Scranton, where he was a four-year recipient of a Presidential Scholarship for the debate team, which he captained his junior and senior years. Doug has been a volunteer with off-off Broadway theaters, an outings leader for the Sierra Club and a member of the Morris Trails Conservancy. Doug resides in Morris Township, N.J.

Recent Presentations by Staff Members

On September 30, Jay Caporale spoke to the Massachusetts Board of Library Commissioners on how to design and implement an annual appeal. Jay also presented at the New England Association of Catholic Development Officers' Fall Conference on October 12. His topic was "Building a Strong Board, One Step at a Time."

On October 2, George Ruotolo and Gene Aug, Ph.D., CFRE, vice president, gave three separate presentations at the National Catholic Development Conference in Chicago. George spoke on comprehensive development programs and capital campaigns; Gene's presentation focused on feasibility studies.

On October 17 at the Massachusetts Chapter of the Association of Fundraising Professionals' Annual Conference, Audrey DeLoffi, senior associate, will facilitate a luncheon roundtable discussion about involving board members in fundraising.

UPCOMING EVENTS

October 17, 2006

Association of Fundraising Professionals
Massachusetts Chapter
2006 Annual Conference on Philanthropy
Sheraton Hotel, Boston, Mass.

October 28, 2006

Archdiocese of Newark Stewardship Day
Union Catholic High School, Scotch Plains, N.J.

November 3, 2006

Association of Fundraising Professionals
New Jersey Chapter
2006 Annual Conference on Philanthropy
Hanover Marriott, Whippany, N.J.

November 10-11, 2006

Episcopal Diocese of New York Annual Convention
Marriott, Tarrytown, N.Y.

CURRENT CLIENT LISTING

- Archbishop Stepinac High School, White Plains, NY
- Blessed Stephen Bellesini, O.S.A. Academy, Lawrence, MA
- Casita Maria, Inc., Bronx, NY
- Cathedral High School/John XXIII Middle School, St. Cloud, MN
- Crow Canyon Archeological Center, Cortez, CO
- Diocese of Brooklyn, Brooklyn, NY
- Dominican Foundation, Province of St. Joseph, NY, NY
- E.C. Scranton Memorial Library, Madison, CT
- Estes Park Medical Center Foundation, Estes Park, CO
- Flint Public Library, Middleton, MA
- Grace Episcopal Church, Hastings-on-Hudson, NY
- Little Sisters of the Assumption, Walden, NY

- Mercy Hospital of Tiffin, Tiffin, OH
- Merrimack Valley Hospice, Lawrence, MA
- Mother of Divine Providence Parish, King of Prussia, PA
- Mount St. Charles Academy, Woonsocket, RI
- Mu Alumni Association, Hoboken, NJ
- National Center for Energy Management and Building Technologies, Alexandria, VA
- National Council on Problem Gambling, Washington, D.C.
- New Jersey SEEDS, Newark, NJ
- Niagara University, Niagara University, NY
- Notre Dame High School, Easton, PA
- Notre Dame High School, West Haven, CT
- Our Lady of Perpetual Help Parish, Bernardsville, NJ
- Our Lady of Perpetual Help Parish, Oakland, NJ
- Our Lady of the Lake Parish, Sparta, NJ
- Palisades Medical Center Foundation, North Bergen, NJ
- Pearle L. Crawford Memorial Library, Dudley, MA
- Randolph Township Free Public Library, Randolph, NJ
- Queen of Peace High School, North Arlington, NJ
- Sacred Heart Parish, Bloomfield, NJ
- St. Francis Parish, Nixa, MO
- St. John the Evangelist Parish, North Chelmsford, MA
- St. Joseph's Parish, Medway, MA
- St. Mary's Parish, Holliston, MA
- St. Raphael Academy, Pawtucket, RI
- The Children's Home, Cromwell, CT
- The Friendship Service Center, Inc., New Britain, CT
- The Susan G. Komen Breast Cancer Foundation – North Jersey Affiliate, Summit, NJ
- VNA Care Network, Inc., Worcester, MA
- Woods Services Foundation, Langhorne, PA

Netlinks is published quarterly by George C. Ruotolo, Jr., CFRE, chairman and chief executive officer of Ruotolo Associates Inc. The newsletter is edited by Liz Campbell, associate. To learn more about the firm, visit our website at www.ruotoloassoc.com.

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