



***A Quarterly Publication of Ruotolo Associates Inc.
February 2004***

**"A Full Service Fundraising and Public Relations Firm for the Nonprofit World"
www.ruotoloassoc.com**

February 2004 Contents

- From our Chairman (Page 1)
- Meet our Church Division Directors (Page 2)
- A "RealCall" Success Story (Page 3)
- St. Vincent Pallotti Parish: A Winning Strategy (Page 3)
- Catholic Giving Rose in 2002 (Page 4)
- National Association of Corporate Directors (Page 4)
- Staff Highlights (Page 5)
- Announcements (Page 5)
- Congratulations to our Clients (Page 6)
- Current Client Listing (Page 8)

FROM OUR CHAIRMAN

Dear Friends,



This New Year marks the 25th Anniversary of the founding of Ruotolo Associates Incorporated. Since 1979, Ruotolo Associates has served schools, libraries, museums and arts/cultural/historic organizations; social service and cause-related organizations; hospitals and medical/health organizations; dioceses, churches and religious organizations. As the needs of our clients have evolved over a quarter century, so have the range and depth of our services and commitment. I want to thank the men and women of Ruotolo Associates who have dedicated themselves to the mission of Philanthropy. In a special way, I want to acknowledge the work of our clients, their volunteers and donors for helping Ruotolo Associates create our story of success.

During the next 12 months, Ruotolo Associates will be commemorating this anniversary in a variety of ways. And, at this time, it is most appropriate that I announce the creation of our Church Division. This new sector is born out of the firm's successful track record with parish and diocesan programs and is dedicated to joining the needs of ministry with professional, individualized, creative strategies and solutions. I am pleased to announce that I have appointed Deacon John J. D'Amico and Mr. James S. Friend, Jr., both of whom reside in the Archdiocese of Philadelphia, to oversee this division. Together, Jim and John offer more than 25 years of experience and commitment in working with religious organizations. You can find more information about our directors and the services of this division by visiting our new Church Division web site at www.churchdivision.com.

I am also very appreciative of all the comments and notes of encouragement surrounding NetLinks. It is our great privilege to be able to communicate with so many of our clients, friends, and associates throughout the philanthropic world. We can only hope this medium will grow and develop in the years to come.

I am, sincerely,



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

MEET OUR CHURCH DIVISION DIRECTORS

Our Church Division Directors offer over 25 years of experience in working with Dioceses, Churches and Religious Organizations.



James S. Friend, Jr., M.A.
Director, Church Division
Senior Associate

“In 25 years, our firm has partnered with over 500 religious organizations to assist them in meeting their capital, stewardship and strategic planning needs.

The Church Division looks forward to continuing that partnership with you by offering only the highest quality consulting through individualized creative strategies and solutions.”

jfriend@churchdivision.com



Deacon John J. D'Amico
Director, Church Division
Senior Associate

“In the modern history of the Catholic Church there has never been a more important time to make a commitment such as this. Ruotolo Associates enters its next 25 years of service to non-profits by establishing its Church Division providing dedicated counsel to meet the diverse planning, public relations and financial needs of the Catholic Church and other faith-based clients.”

jdamico@churchdivision.com

www.churchdivision.com

Find out more about Deacon John and Jim by visiting our web site

A "REALCALL" SUCCESS STORY



Father John O'Leary was at first hesitant to consider an automated calling service to reach his parishioners. Father John took an innovative approach to the task and utilized the speed and clarity of The Broadcast Team's RealCall technology to send an irresistible message.

The fourth grade students of Assumption School were singing "Something Beautiful for God" while Father John gently encouraged participation in the parish capital campaign in order to provide for the future education and faith formation of the young people of the parish. "What you are hearing in the background is the sound of our blessings ...we thank those of you who have pledged to insure our future blessings." On Wednesday afternoon, 1700 messages were delivered. The following weekend over 100 pledges were made, including four who had previously declined to make a pledge.

The RealCall technology, the innovation of the pastor and the voices of the children proved to be a powerful force to motivate the people of Assumption Parish in Atco, New Jersey.

ST. VINCENT PALLOTTI PARISH: A WINNING STRATEGY



The capital campaign conducted at St. Vincent Pallotti Parish in Haddon Township, New Jersey is a perfect example of what can be accomplished with the combined leadership of a truly committed pastor and volunteer campaign cabinet. Ruotolo Associates, under the direction of Senior Vice President Theresa Shubeck, devised a multifaceted approach to a campaign that involved the active support of the whole parish.

In the words of the pastor, Monsignor Louis A. Marucci, "It is evident that excellent development strategies require excellent relational skills. A comprehensive capital campaign invites the entire parish community to assume leadership, responsibility and accountability for the temporal and spiritual needs of the parish. The strategies utilized in the capital campaign for a parish primarily comprised of senior citizens encouraged all to participate and take responsibility for their Church."

The four-phase plan began with a feasibility study conducted by Ruotolo Associates in February and March of 2003. Monsignor Marucci, was an inspirational powerhouse, effectively communicating the needs of the parish and utilizing all the tools and resources available to him. He personally recruited the co-chairs of an 18-member cabinet that was instrumental in soliciting \$400,000 from 87 families during the Advanced Gifts Phase of the campaign. To date, the parish has raised nearly \$870,000, surpassing its goal of \$800,000.



During the feasibility study, parishioners articulated that the need for roof repair was evident, but there was less desire and understanding of the need for renovating the rectory rather than utilizing the existing convent for parish offices and meeting space. An essential part of the campaign strategy was clear communication about the toxic mold issue and its effect on the rectory, and that using the current convent where the rectory is now housed would not be a cost-effective solution to the problem. Through a well-attended open house (with tours of the rectory and convent) after Mass, and accompanying bulletin inserts and pulpit talks, the need for renovation of the rectory became widely understood and laid the groundwork for fundraising. The campaign case statement brochure was comprised of a compelling rationale for the transformation of the rectory into a pastoral center, including meeting areas, a conference room and an elevator to ensure accessibility to all parishioners. A portion of the second floor would be dedicated to priests' living quarters. This plan would

essentially convert and expand the building from a private residence for the priests to a public space, which represents the most cost-efficient alternative.

Cabinet members were trained by RA staff to make personal, one-on-one solicitations. The parish held receptions and phone-a-thons, mailed personalized solicitation packets, made presentations from the pulpit and utilized RealCall, an automated phone messaging system that can simultaneously place calls to all parishioners. Two distinct personal phone messages from Monsignor Marucci went out thanking those who already contributed, as well as soliciting those who had not yet pledged.

Post-campaign follow-up is another important element in the continuing support of the parish. A newly-formed committee will monitor pledge payments, report to parishioners on the progress of the campaign, continue to solicit additional gifts and, most importantly, thank those who have contributed to the campaign through letters and after-Mass receptions.

A successful campaign not only provides a one-time injection of needed funds, but benefits a parish for years to come by educating the community on the importance of giving and being actively involved in the parish. It is our sincere hope that St. Vincent Pallotti will continue to grow as one community and that the parish family will continue to be blessed by parishioners' generous sharing of their time, talent and treasure.

CATHOLIC GIVING ROSE IN 2002



In its November 2003 issue, *The Chronicle of Philanthropy* revealed that giving in the Catholic Church rose 4.9% in 2002. It is important to note that this occurred in the midst of the most significant scandal to impact the Church in modern times. At its height, front page articles ran in *The New York Times* and other publications for at least 10 successive days, describing in great detail the charges being brought against Catholic dioceses and their clergy. In spite of grave accusations, the Center for Applied Research in the Apostolate at Georgetown University, which studies the finances of the country's Catholic dioceses, reported that 2002 giving rose 4.9%. Joseph Claude Harris, an independent researcher, analyzed the center's most recent information to examine philanthropic trends in the Church. Mr. Harris determined that, while parish collections increased, giving to special appeals by bishops and other Church officials declined 2.3%. These appeals were for such causes as social service programs and funding for retired priests. The study reported that the reasons for this downturn might be the economic climate and/or the backlash over the sex scandal. Mr. Harris said, "Members of the parish know their pastor and want to fund the cost of a parish sacramental program and/or educate their children." RA has had similar results in that its parish campaigns have, for the most part, reached their goals with very little backlash toward the individual parish leadership. However, there has been concern expressed about the direction of diocesan finances towards legal costs and settlement of lawsuits in light of the scandal.

NATIONAL ASSOCIATION OF CORPORATE DIRECTORS



The American Association of Fundraising Counsel (AAFRC) recently joined the National Association of Corporate Directors (NACD). George Ruotolo has taken advantage of this new alliance by attending the NACD annual conference in Washington and a one-day workshop in New York to receive the latest information on issues of governance that affect both the for-profit and the not-for-profit sectors. In light of the Sarbanes-Oxley legislation, Ruotolo Associates recognizes a responsibility and an opportunity to provide counsel to its clients on governance issues to enhance the efficiency and effectiveness of boards of directors and trustees, thereby

improving their missions. As we all know, endemic in institutional challenges and shortcomings are oftentimes the ability, or lack thereof, of boards to function at the highest level.

STAFF HIGHLIGHTS

PAM DELUCA RECEIVES MANNING AWARD



Each year, Ruotolo Associates bestows upon one of its employees its Tim Manning Culture of Excellence Award* for outstanding professional practice on behalf of the firm.

The 2003 award was given to Senior Associate Pam DeLuca of Glen Ridge, NJ. In his own words, George Ruotolo described Pam's tenure with the firm as "full of successes and challenges. She has served her clients with distinction and professionalism, including Grace Church in New York, which has just exceeded its goal – no small feat."

Pam has been with Ruotolo Associates for the past three years. She has worked with several nonprofits in New York and New Jersey, both as a consultant and a volunteer, and continues her work with Jersey Cares and the Community FoodBank of New Jersey. She is very active in her parish where she is a Teen Youth Group advisor and Board Member.

*This award was renamed in 2001 as a tribute to the late Tim Manning whose work ethic, creativity, character and professional standards are attributes to which the RA staff members aspire.

ANNOUNCEMENTS

New Address for New England Office

Joseph J. Caporale, CFRE, President and COO
Ruotolo Associates Inc.
2 Dundee Park, Suite 205A
Andover, MA 01810

Telephone, Fax and Email remain the same:
Tel: 978-475-6890
Fax: 978-475-7797
Email: jay@ruotoloassoc.com



February 6, 2004

New Jersey Library Association Building Fair
Caldwell College, Caldwell, NJ

Our President and COO, Jay Caporale will speak on Library Fundraising and RA will be exhibiting at the fair.

February 28, 2004

Archdiocese of Philadelphia, Annual Stewardship Day
Saint Charles Borromeo Seminary, Philadelphia, PA
9:00 AM - 2:00 PM

RA's Church Division will be sponsoring breakfast and exhibiting at this event.
Please contact Kathleen Dongiven, Director of Stewardship, to register.

March 20, 2004

Massachusetts Board of Library Commissioners Annual Library Trustee Symposium

Holiday Inn, Boxborough, MA

Our President and COO, Jay Caporale will present a workshop, "Building a Library Endowment."

CONGRATULATIONS TO OUR CLIENTS!

The following highlights represent some of our clients' recent accomplishments.

Blessed John XXIII University Center, Fort Collins, CO, Rev. Don Willette, Pastor: Serving Colorado State University, this parish plans to build a new facility that would house classrooms and meeting spaces, as well as to renovate the sanctuary, parish offices and rectory. The parish has raised more than \$1.17 million in commitments toward its goal of \$1.3 million.

Brooklyn Friends School, Brooklyn, NY, an independent Quaker institution, completed a mid-campaign evaluation to determine the strategy for support for further renovations and additional space. The school is preparing to launch the next phase of its capital campaign under the leadership of Michael Nill, Head of School.

Cathedral Preparatory Seminary, Elmhurst Queens, NY, celebrating its 90th Anniversary in 2004, has completed a feasibility study and is going forward with the quiet phase of a capital campaign. The campaign is under the leadership of Father Joseph Calise '72, Rector/Principal; Louis D'Amico '82, Business Manager; Jim Dilg, Alumni Director; and Sister Mary Ann Tirelli, Director of Development.

DePaul Catholic High School, Wayne, NJ, has been retained by RA to conduct a confidential feasibility study for a comprehensive capital campaign. A number of recent initiatives have realized positive and significant results for the school, under the leadership of Father Geno Sylva, President.

Glastonbury Abbey, Hingham, MA, has begun soliciting members of their community for its capital campaign to cover the building costs of the new conference center that was completed in 2001. To date the Abbey has raised \$409,000. Robert and Denise DiCenso, campaign co-chairs, have been working actively with Fr. Nick Morcone, Abbott; Chris Nagle, Business Manager; and Carol Stanton, Development Director, to ensure the campaign's success.

Greater Lawrence Family Health Center (GLFHC), Lawrence, MA, has completed its planning study and has retained RA to initiate a major gifts program and design a comprehensive development plan. RA has been working with Bob Ingala who serves as CEO.

Trenton Area YMCA, Trenton, NJ, is continuing on a campaign initiative to raise support for the building of a new full-service, 70,000 square foot, \$10 million facility for which half of the funds they seek to raise philanthropically. Campaign co-chairs recruited for the effort are Doug Palmer, Trenton's mayor, and Mercer County executive Bob Prunetti. Mel Hill serves as executive director.

Harvard Public Library, Harvard, MA – Ruotolo Associates helped raise \$1.2 million during Phase I of its campaign. RA is now working with the library to coordinate a communication effort as it approaches town meeting in late March.

Jackson School and Walnut Park Montessori School, Newton, MA – RA has been retained to facilitate the strategic planning process for the two schools which are part of the Sisters of St. Joseph of Boston. Susan Niden and Sr. Mary Ann Connolly serve as principals, respectively.

Mercymount Country Day School, Cumberland, RI, is in the organizational stage of a capital campaign to build an addition which will provide more classroom space and a library for the school. The campaign goal is \$750,000 - \$1,000,000. Sr. Martha Mulligan, R.S.M., is principal at Mercymount.

Merrimack Montessori School, Haverhill, MA has retained Ruotolo Associates to conduct a feasibility study, as well as facilitate a strategic planning process at the school which is part of the Sisters of St. Joseph of Boston. Ronni George serves as principal.

Morris Catholic High School, Denville, NJ - RA completed a planning study and development program assessment, and they have recently begun the quiet phase of their capital campaign.

Mount Saint John Home and School for Boys, Deep River, CT - RA is conducting a planning/image study. Cathi Coridan serves as executive director.

New Jersey Center for Visual Arts (NJCVA), Summit, NJ, has met two \$250,000 challenge grants issued by a local philanthropist and family members during the quiet phase of a \$5 million campaign to raise funds for building expansion and renovations, and an endowment to develop and support educational programs and professional development. Eric Pryor serves as President and Betsy Smith is the director of development.

North Shore Community College, Danvers, MA, has retained RA for a second year of managing a major gifts initiative, partnering with Wayne Burton, President, and Sandy Edwards, Vice President for Institutional Advancement.

Our Lady of Perpetual Help, Oakland, NJ, has recently completed its planning study as part of a capital campaign to renovate their church and make capital improvements to the grounds. Father Thomas Paul Lipnicki serves as pastor.

Sisters of the Blessed Sacrament, Bensalem, PA -- This order, founded by Mother Katharine Drexel, has retained the services of the Church Division to raise \$3.5 million towards to the building of the new St. Katharine Drexel Mission Center and Shrine. Sister Juliana Haynes, SBS, Director of Public Affairs, oversees this campaign along with MaryAnn Piccioni, Director of Development.

South Church in Andover, MA – RA has completed its work with South Church having helped the parish raise \$1.7 million. Rev. Cal Mutti, Senior Pastor, and the campaign co-chairs are continuing with the campaign and are confident they will reach their goal of \$2 million.

Springfield Catholic Schools, Springfield, MO, is conducting a \$1.6 million endowment campaign. They have raised \$700,000 to date in the Advanced Gift Phase of the campaign. Ann Meese is director of the school system and Mick Denniston serves as the director of development.

St. Agnes, Clark, NJ – RA completed a planning study, and a capital campaign is anticipated to address the needs articulated in a Ten Year Master Plan. Rev. Msgr. James S. Choma serves as pastor.

St. Ann, Raritan, NJ – RA's Church Division is moving forward with a Stewardship Initiative within the parish. Father Kenneth D. Brighenti, Ph.D. serves as pastor.

St. Barnabas, Portsmouth, RI is in Phase II of a campaign to build a new rectory, which will include an office for the pastor, Fr. Kevin Brassil. Campaign Chair, Kevin McCarthy, has been an active leader in the campaign.

St. Joseph High School in Hammonton, NJ, celebrated the opening of its newly renovated building in September. Formerly a public middle school, the building was purchased and renovated to include a state-of-the

art library/media center. Paul Ordille and James Rodio are co-chairs of the steering committee for a major gifts initiative that has raised nearly \$1.3 million to date.

St. Paul's Memorial Church, Staten Island, NY, an Episcopal Church located in the Greenville section of Staten Island, has completed a feasibility study for a capital campaign that will be directed to renovations, repairs and historic preservation for the church and rectory. Father William A.F. Blasingame is the Rector.

St. Peter the Fisherman Parish, Mountain Home, AR, has now raised \$1.73 million toward its \$2 million capital campaign to build a new parish hall/educational building. The parish has received generous donations from the Knights of Columbus in Mountain Home. Rev. Jim Fanrak is pastor.

St. Philomena School, Portsmouth, RI, is concluding its general phase of a campaign to construct a new building for grades 6 – 8. Funding from area banks and a family foundation has helped the school raise \$930,000 to date. Sr. Ann Marie Walsh, FCJ is principal at St. Philomena.

CURRENT CLIENT LISTING

- Aljira Newark, NJ
- Assumption Parish, Atco, NJ
- Blessed John XXIII University Center Fort Collins, CO
- Brooklyn Friends School Brooklyn, NY
- Children's Therapy Center Fair Lawn, NJ
- Cathedral Preparatory Seminary Elmhurst, NY
- DePaul Catholic High School Wayne, NJ
- Diocese of Camden Camden, NJ
- Glastonbury Abbey Hingham, MA
- Grace Church in New York New York, NY
- Greater Lawrence Family Health Center Lawrence, MA
- Harvard Public Library Harvard, MA
- Hospices of the National Capital Region Fairfax, VA
- Jackson School Newton, MA
- Library of the Mendhams Mendham, NJ
- Mercymount Country Day School Cumberland, RI
- Merrimack Montessori School Haverhill, MA
- Morris Catholic High School Denville, NJ
- Mount St. John Home and School for Boys Deep River, CT
- Nazareth Regional High School Brooklyn, NY
- New Jersey Center for Visual Arts Summit, NJ
- NJ World Trade Center Scholarship Fund Trenton, NJ
- North Shore Community College Danvers, MA
- Oak Bluffs Public Library Oak Bluffs, MA
- Our Lady of Good Counsel High School Wheaton, MD
- Our Lady of Perpetual Help Parish Oakland, NJ
- Prevention First Oakhurst, NJ
- Shepherds of Youth Florham Park, NJ
- Sisters of the Blessed Sacrament Bensalem, PA
- South Church in Andover Andover, MA
- Summit Speech School New Providence, NJ

- Springfield Catholic Schools Springfield, MO
 - St. Agnes Parish Atlantic Highlands, NJ
 - St. Agnes Parish Clark, NJ
 - St. Anne Parish Raritan, NJ
 - St. Barnabas Parish Portsmouth, RI
 - St. John Villa Academy Staten Island, NY
 - St. Joseph High School Hammonton, NJ
 - St. Paul's Memorial Church Staten Island, NY
 - St. Peter the Fisherman Parish Mountain Home, AR
 - St. Philomena School Portsmouth, RI
 - St. Vincent Pallotti Parish Haddon Township, NJ
 - Trenton Area YMCA Trenton, NJ
 - Walnut Park Montessori School Newton, MA
-

Copyright 2004 Ruotolo Associates Inc.

www.ruotoloassoc.com