

## NETLINKS

*A Quarterly Publication of Ruotolo Associates Inc.*

**September 2004**

*"A Full Service Fundraising and Public Relations Firm, Celebrating 25 Years of Service to the Nonprofit World"*

[www.ruotoloassoc.com](http://www.ruotoloassoc.com)

### **AN OVERVIEW OF PHILANTHROPIC GIVING IN 2003**

*Presented by: Jay Caporale, CFRE, President and COO*



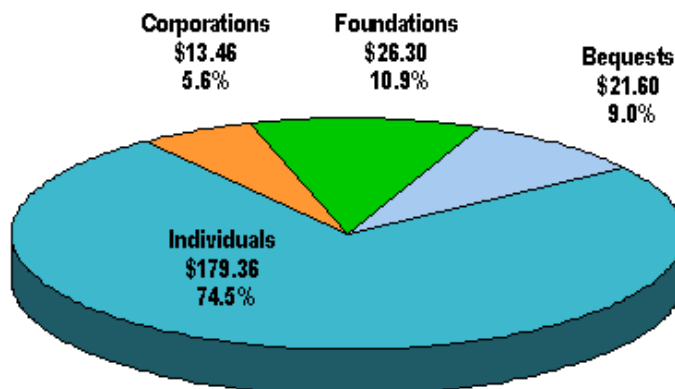
The American Association of Fundraising Counsel (AAFRC), established in 1935, is intended to enhance the visibility, utilization, professionalism, growth and effectiveness of its member firms. AAFRC member firms adhere to a strict code of ethics, and represent a high standard in fundraising consulting today. Ruotolo Associates, as one of the AAFRC member firms, embraces the criterion imposed by the organization. As many of our readers probably know, Ruotolo Associates has been involved extensively in the Giving USA Foundation. George C. Ruotolo, Jr., CFRE, Chairman and CEO of Ruotolo Associates, served as Chair of the AAFRC Trust for Philanthropy, publishers of Giving USA, for 2000-

2001. During that time the Association and the Trust took a leadership role in providing a historical perspective of the tumultuous philanthropic climate experienced in the aftermath of 9-11.

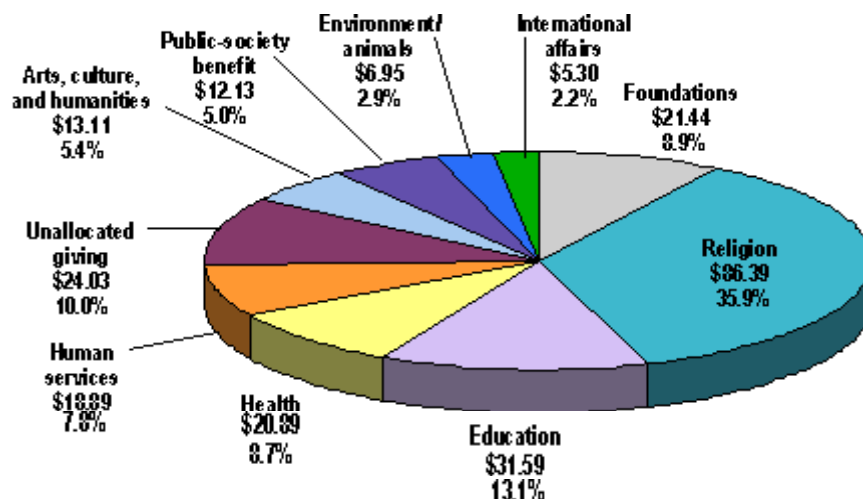
The AAFRC's annual publication, Giving USA, published in June 2004, provides an overview of philanthropy, detailing the sources of funding, the recipients and giving trends throughout the year.

The following charts from Giving USA represent 2003 giving trends. This information is pertinent to all of us as we work in a changing and challenging philanthropic environment.

#### **2003 CONTRIBUTIONS: \$240.72 BILLION BY SOURCE OF CONTRIBUTIONS**



**2003 CONTRIBUTIONS: \$240.72 BILLION  
BY TYPE OF RECIPIENT ORGANIZATION**



Charitable giving rose to nearly \$241 billion in 2003, a 2.8% growth rate over the revised estimate of \$234 billion given in 2002.

**Funding Sources, as compared with 2002 figures**

- Individual giving is up by 2.5%.
- Bequest giving is up by 12.8%.
- Giving by corporations is up by 4.2%.
- Foundation giving is down by 2.5%.

**Funding Recipients, as compared with 2002 figures**

- Giving to religion remains the largest portion of charitable giving with over \$86 billion, representing an increase of 4.3%.
- Giving to International Affairs was up by 14.8%.
- Health organizations experienced an increase of 10.7% in giving.
- Arts, Culture, and Humanities received a substantial increase of 7.3%.
- Human services went up by 1.3% after a decrease the previous year.
- Sectors experiencing a drop in giving included: Foundations (25.4%) and Education (0.8%).

To order a copy of Giving USA 2004 online go to <http://www.givingusa.org> or call (888) 544-8464 or (412) 741-1495.

## **THE NEW JERSEY CENTER FOR VISUAL ARTS...CREATING ACCESS TO ART**

***Written by Theresa A. Shubeck, Senior Vice President***



“Making a work of visual art is the first form of invention most of us will encounter in our lives. As visionary thinkers we form an idea in our minds’ eye, otherwise known as our imagination, and create it by manipulating the elements of art.” With imagination for inspiration, Eric Pryor, President of the New Jersey Center for Visual Arts (NJCVA), along with Campaign Co-Chairs Millie Cooper and Betse Gump, and members of the Board of Trustees turned a spadeful of dirt and officially broke ground on June 15th for the expansion and renovation of the Center facilities.

The event was boosted by a recent gift of \$1 million from an anonymous donor, and the official news received by NJCVA less than 24 hours before ground breaking of notification by The Kresge Foundation of Troy, Michigan, awarding the organization a challenge grant of \$275,000 for its Access to Art campaign. The Kresge Foundation is a leading national foundation providing challenge grants for construction and renovation of facilities.

Founded in 1933 by a dedicated group of local artists, NJCVA, which serves children through seniors, has evolved into a major regional art center. It makes studio classes, exhibitions, educational outreach and professional development programs accessible to all New Jersey residents to encourage understanding and excellence in the creation and presentation of contemporary visual art.

NJCVA engaged Ruotolo Associates (RA) for a planning study conducted during the summer of 2002. The quiet phase of a capital campaign was subsequently launched that Fall for the purpose of renovation and expansion featuring four new studios. The new facilities will offer additional opportunities for public programming, a two-story gallery, and critically needed office and storage space.

In order to inspire and motivate donor prospects, the case for support needed to be framed within the core values of NJCVA. These included but were not limited to engaging underserved and economically disadvantaged communities, celebrating the diverse cultures of New Jersey, and aiding in the professional development of emerging artists, art educators, curators and arts administrators.

The campaign was galvanized by the leadership of Co-Chairs Millie Cooper and Betse Gump, individuals with a long-standing dedication to the Center, who are also known for their extraordinary commitment to change and improvement in their community. The vision and plan emerged through extensive dialogue by a core group of Board members in concert with the professional expertise of President Eric Pryor, who began his tenure at NJCVA at the launch of the campaign.

To date, the Access to Art campaign has raised over \$3.8 million and needs to raise an additional \$1,815,971, reach the challenges put forth by The Kresge Foundation, and engage widespread support in its public phase. The success to date of Access to Art is attributable to leadership support of key donors who have been loyal to NJCVA and who were involved in the critical stages of planning this initiative. Credit belongs to Board members who tenaciously advanced the project, and subsequently launched the campaign, despite the many challenges which inevitably emerged. The case is organic to the mission and vision of NJCVA and the vibrance of the proposed expansion inspires imagination and pride.

Millie Cooper described the firm's counsel thusly, "I always felt that Ruotolo Associates was right there at our side as an enthusiastic partner with strategizing and coaching every step of the way. The firm had done its homework with understanding who we were, where we wanted to go and who our friends were. The advice they gave us was always very helpful, professional and diverse. Certainly, we didn't know anything about running these campaigns. RA listened to us, made adjustments along the way, and got along with all of our various personalities. In the fund raising world you have to be broad thinking, open to ideas and ready to create and act on opportunities. Ruotolo Associates professionalized our organization."

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## **BY GEORGE**



***Written by George C. Ruotolo, Jr., CFRE, Chairman and CEO***

I am routinely asked by prospective clients and volunteers and, in some cases, personal friends why Ruotolo Associates and similar firms do not operate on a percentage of what we raise for clients. The answer, in short, is that it is best for the non-profit and best for the donor.

The history of professional fundraising counsel goes back to post World War I and it has always been felt by the leaders of this profession that it is inappropriate and unethical to charge on the basis of what is raised.

With the founding of the American Association of Fundraising Counsel in 1935, this industry standard bearer of which Ruotolo Associates has been a member since 1986, has always stood fast in supporting this principle. Today this position of not permitting percentage based compensation for fundraising professionals is affirmed by the Association of Fundraising Professionals (AFP), the Counsel for the Advancement in Support of Education (CASE), the Association of Healthcare Philanthropy (AHP), and the Independent Sector, to name a select few.

The reason for this position is that individuals and consultants that are either employed or retained by non-profit organizations need to function as advocates for the non-profit, but simultaneously need to be able to discuss considerations of giving on the part of individuals, foundations and corporations in an unencumbered manner. As fundraising professionals advise potential donors on how best to support a charity, the prospective donor needs to believe that these discussions have at their root what is best for the donor and the charity and not what is best for the fundraising professional. Clearly, if fundraising professionals' compensation was tied to the amount of a person's donation, a question of confidence, candor and honesty could be raised on the part of the prospective donor. Additionally, the professional fundraiser's strategic thinking needs to be prospect/donor focused and unencumbered by calculations of their own relative compensation. This issue has been reviewed in recent past by the AAFRC and the AFP, and in both cases the decision to reject percentage fundraising was affirmed.

## STAFF HIGHLIGHTS

### MILISSA ELSE, ASSOCIATE



As an Associate with RA for seven years, Milissa Else has partnered with several clients on a variety of projects during her tenure. In addition to working with clients in conducting studies, capital campaigns, strategic planning and grant writing, she is also skilled in database management and has created prospect identification and tracking systems for clients, as well as a client database for Ruotolo Associates. Milissa Else stands as a credit to the profession of philanthropic consulting and Ruotolo Associates Inc. During her time with our firm, she has demonstrated intelligence, creativity, compassion and

a work ethic that makes all of us at RA proud to have her as part of our team.

When asked about a project of great significance in her career, Milissa discussed St. John Villa Academy, a private Catholic school in Staten Island, NY, as one client that stands out in her mind. Milissa wrote the final report for the first of two feasibility studies, helped establish their development program, was involved in hiring a Director of Development and continues to work with the school conducting a capital campaign. "I have invested a great deal in Villa; we have grown their entire program and it has been incredible to be a part of the progress they've made in the last six years."

Milissa volunteers much of her time by serving on the Board of Directors of her alma mater's Mt. Holyoke College Alumni Association as the newsletter editor. In addition, she volunteers one day per month assisting and providing rides to elderly and disabled residents through Starfish, a community organization she learned of through her church.

Milissa and her husband Bert, along with their 6-year old daughter Natalie, live in Rutherford, New Jersey.

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## UPCOMING EVENTS

### **International Catholic Stewardship Council Annual Conference**

September 12-14, 2004

Hyatt Regency, New Orleans, LA

Ruotolo Associates is sponsoring the tote bags.

### **National Catholic Development Conference and Exposition Celebrate the Magic of Catholic Philanthropy**

September 16-18, 2004

The Peabody Orlando, Orlando, FL

Ruotolo Associates is a partial sponsor for the awards luncheon.

### **Archdiocese of Newark Stewardship Day**

October 2, 2004

Felician College, Lodi, NJ

Ruotolo Associates is the primary sponsor.



### **AFP New Jersey Chapter**

#### **Charting Your Course: 2004 Conference on Philanthropy**

November 4, 2004

Hanover Marriott, Whippany, NJ

Theresa Shubeck, Senior Vice President, serves as Board Member and Chair of the chapter's Job Bank.

### **AFP Massachusetts Chapter**

2004 Conference on Philanthropy

Bringing Donors Closer: Building Philanthropic Communities

November 30, 2004

Marriott Copley Place, Boston, MA

Ruotolo Associates is a Benefactor Level sponsor.

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## **CURRENT CLIENT LISTING**

- Aljira
- Newark, NJ
- Blessed Stephen Bellesini, O.S.A. Academy
- Lawrence, MA
- Brooklyn Friends School
- Brooklyn, NY
- Cathedral High School / John XXIII Middle School
- St. Cloud, MN
- Cathedral Preparatory Seminary
- Elmhurst, NY
- Children's Therapy Center
- Fair Lawn, NJ
- CLASS, Inc.
- Lawrence, MA
- Diocese of Camden, Camden, NJ
- Glastonbury Abbey
- Hingham, MA
- Greater Lawrence Family Health Center, Lawrence, MA
- Greater Trenton Area YMCA, Trenton, NJ
- Green-Wood Cemetery Foundation, Brooklyn, NY
- Mercymount Country Day School, Cumberland, RI
- 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
- Niagara University, Niagara University, NY
- NJ World Trade Center Scholarship Fund, Trenton, NJ
- Notre Dame High School, West Haven, CT
- North Shore Community College, Danvers, MA
- Operation Hope, Fairfield, CT
- Our Lady of Perpetual Help Parish, Oakland, NJ
- Prevention First, Oakhurst, NJ
- Salem Mission, Salem, MA



**Client list continued...**

- Shepherds of Youth, Florham Park, NJ
- Sisters of the Blessed Sacrament, Bensalem, PA
- Summit Speech School, New Providence, NJ
- Springfield Catholic Schools, Springfield, MO
- St. Agnes Parish, Clark, NJ
- St. Ann Parish, Raritan, NJ
- St. Bernard's Parish, Kingstown, RI
- St. John Villa Academy, Staten Island, NY
- Sts. Joseph and Michael Parish, Union City, NJ
- St. Paul's Memorial Church, Staten Island, NY
- St. Paul Catholic High School, Bristol, CT
- St. Paul Parish, Ramsey, NJ
- St. Patrick Parish, Providence, RI
- St. Patrick Parish, Stoneham, MA
- Walnut Park Montessori School, Newton, MA
- YMCA Northeast Family - Haverhill / Newburyport, Haverhill, MA
- YWCA of Haverhill, Haverhill, MA
- Ruotolo Associates, Inc. Headquarters

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For more information about our services to religious organizations,  
visit us at [www.churchdivision.com](http://www.churchdivision.com)

For a complete listing of services to all non-profits,  
visit our main site at [www.ruotoloassoc.com](http://www.ruotoloassoc.com)

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