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RUOTOLO ELECTED CHAIR OF GIVING INSTITUTE: LEADING CONSULTANTS TO NON-PROFITS

By Joseph (Jay) Caporale, CFRE, president and chief operating officer

I am pleased to announce that George C. Ruotolo, Jr., CFRE, chairman and chief executive officer of Ruotolo Associates Inc., has been elected chair of the Giving Institute: Leading Consultants to Non-Profits, formerly the American Association of Fundraising Counsel (AAFRC).



When George founded the firm in 1979, his goal was to provide the highest quality consulting service to address the challenges of non-profit clients. He is committed to providing our staff members with the resources and enrichment opportunities that allow them to realize their own capacity and to succeed both personally and professionally. Additionally, George has volunteered his time with various non-profit organizations, including the American Red Cross, Bergen-Crossroads, NJ Chapter, and the Ridgewood Educational Foundation.

Through his vision, RA has successfully served more than 800 clients throughout the United States and abroad.

Please join me in congratulating George on his appointment to chair of the Giving Institute: Leading Consultants to Non-Profits. The text of the press release announcing his tenure follows:

George C. Ruotolo, Jr., CFRE, chair and CEO of Ruotolo Associates Inc., Cresskill, NJ, has been elected chair of Giving Institute: Leading Consultants to Non-Profits. His two-year term continues through November 2008. The Institute is the former American Association of Fundraising Counsel.

Ruotolo, a fundraising consultant and expert in the field of philanthropic giving, also previously served as chair of the Institute's research arm, Giving USA Foundation™. Ruotolo follows Ray C. Clements of The Clements Group in the role of chair. Richard T. Jolly, vice president of Marts & Lundy, Lyndhurst, NJ, was elected to another one-year term as chair of the Foundation.

Also elected to the Giving Institute board, for one-year terms, were:

Nancy L. Raybin, First Vice Chairman
Thomas W. Mesaros, CFRE, Second Vice Chairman
David H. King, CFRE, Treasurer
Aggie Sweeney, CFRE, Secretary

Raybin is managing partner of Raybin Associates in New York City and also is a past chair of the Foundation. Mesaros, based in Seattle, is president and CEO of The Alford Group. King, of Atlanta, is managing partner and president of Alexander Haas Martin & Partners. Sweeney, also of Seattle, is CEO of The Collins Group.

Officers were elected at a recent Board meeting in New York.

“I am greatly honored to have been selected to lead this group, which has gone through tremendous change and growth in its 70-plus years of existence,” Ruotolo said. “It is my hope that through the collective leadership of the officers and directors, we will continue to serve well the philanthropic community through the wise counsel and standards of practice we developed long ago.”

The former AAFRC changed its name after a historic 70 years in existence to more accurately reflect the scope and breadth of work its member firms provide to the philanthropic community. While fundraising still remains an integral part of the Institute and its firms, the services they provide are extremely diverse and expansive. Additionally, many member firms work extensively outside the United States.

Giving Institute: Leading Consultants to Non-Profits, an international association of leaders in the philanthropic consulting field, is headquartered in Glenview, IL. Its 38 member firms have specialties in all areas of philanthropic consulting, including fundraising, executive search, capital campaigns, feasibility studies and marketing communications. Its mission is to advance the practice of philanthropy through research, education and best practices. For more information, visit www.givinginstitute.org.

FIRM APPOINTS DIRECTOR OF THE CHURCH DIVISION



Ruotolo Associates Inc. is pleased to announce that Todd R. Gibbs has been appointed director of the Church Division.

“We are very excited to announce the appointment of Todd, a uniquely talented individual who possesses the personal and professional characteristics that will provide the Church Division and our clients the necessary leadership to fulfill their diverse philanthropic and stewardship education needs,” said George C. Ruotolo, Jr., CFRE, chairman and chief executive officer of Ruotolo Associates. “Todd’s extensive fundraising and management experience, specifically with faith-based organizations, coupled with his educational background and ability to collaborate with staff, clients and volunteers alike, makes him ultimately qualified to serve as Director of the Church Division. In this position, Todd is charged with developing and implementing creative strategies and solutions to achieve the specific goals of our religious clients while setting the comprehensive direction for the continued growth of the Church Division.”

For more than 27 years, Ruotolo Associates has served to propagate the faith and mission of more than 500 individual churches, dioceses, religious orders and affiliated organizations throughout the United

States. As the needs of these faith communities have evolved, so too have the range and depth of the Church Division's services. A highly experienced, credentialed and dedicated team, sensitive to the distinct charism of each faith community, forms working partnerships with our clients and provides the highest quality counsel in the areas of capital campaigns, stewardship, fund development, strategic planning, public relations and related management services.

Todd, the 2006 recipient of the firm's Tim Manning Culture of Excellence Award, joined Ruotolo Associates in September 2004 and has since worked with a diverse group of institutions and parishes on complex projects. He has provided distinguished counsel to clients in the areas of feasibility and planning studies, capital campaigns, major gifts, stewardship, development office operations, strategic planning, volunteer management, board development, special events and public relations. Todd recently completed a successful debt-reduction campaign for St. Mary's Parish in Holliston, MA, and is providing comprehensive capital campaign counsel for St. Joseph Parish in North Plainfield, NJ; Grace Church in Millbrook, NY; First Congregational Church in Dudley, MA; and The Friendship Service Center in New Britain, CT. Todd also provides strategic development counsel to the Carmelite Nuns at Carmel of the Incarnation in Beacon, NY.

Todd first worked with RA while serving as the associate director of development and director of alumni affairs at Holy Cross High School in Waterbury, CT. At Holy Cross, Todd developed the school's alumni program and worked closely with Ruotolo Associates to plan and execute the school's first major capital initiative to construct a new arts and technology center. Todd was recruited by his alma mater, Quinnipiac University in Hamden, CT, where prior to joining Ruotolo Associates, he managed all aspects of the University's 25,000 member alumni association and a parent program that served 6,500 families.

Todd transcends Ruotolo Associates' commitment to community service and volunteer activity. He is a member of St. Francis of Assisi Parish in Naugatuck, CT, and recently established a development program for the parish's elementary school. He is a board member-elect for the independent St. Francis School Association Foundation, remains very active at his high school, LaSalle Institute in Troy, NY, and serves on the Board for Kangaroo's Corner Children's Learning Center.

Todd graduated with honors from Quinnipiac University, where he competed as a member of the men's basketball team. He lives in Oakville, CT, with his wife, Carrie, and daughters, Taylor and Madison.

RESHAPING THE FUTURE OF CATHOLIC SCHOOLS IN BROOKLYN DIOCESE

By Doug Held, associate

One of the largest challenges for any non-profit is to build and maintain a strong board. While leaders of organizations know that boards are critical to their long-term success, it can be daunting to find people who believe in their mission, possess a variety of personal and professional skills and are willing and able to contribute philanthropically to the cause.



That challenge was multiplied significantly when the Diocese of Brooklyn retained Ruotolo Associates to help establish boards that would provide governance for its approximately 120 elementary schools. Faced with changing demographics and accompanying budget pressures, Bishop DiMarzio convened a task force to recommend proactive solutions to ensure the continuation of Catholic elementary education in as many areas of the Diocese as possible. One key recommendation was for schools to recruit lay member expertise and assistance through the creation of a new governance model. Eighteen months ago, the Diocese engaged RA to work in concert with Dr. Thomas Chadzutko, Superintendent for Catholic

Schools Support Services, and his staff to help recruit volunteer leadership and train and support boards through their initial development.

To recruit prospective board members, RA and Dr. Chadzutko's office helped pastors and principals identify potential volunteer leadership from the parishes, local business community and, most especially, alumni of the schools. Because the vision is that boards will provide oversight and actively support the schools' missions through committee work, RA encouraged the seeking of professionals with experience in business, marketing, sales and education. Comprehensive training includes orientation detailing roles and responsibilities of new board members and in-services designed to help pastors and principals adapt to the new model.

The Diocese also asked RA to include development programs within this initiative. Because most people are accustomed to thinking of their college and even high school alma maters in a philanthropic light, the firm has encouraged boards of these elementary schools to recognize that their alumni are also their most likely donors and prospective volunteer leadership. To this end, RA has helped new boards build alumni databases, begin communications and plan receptions with prominent, local graduates.

Certainly a challenge inherent within this initiative has been how to manage a process so large in scope and ensure consistency. The neighborhoods and parishes in the Diocese of Brooklyn are especially diverse in every respect, and what works in Canarsie might not be effective in Park Slope. RA helped the Superintendent's Office design and then disseminate specific criteria of a fully operational board, including bylaws and record keeping, effective committees, board evaluation and written plans with annual goals. Not only does this support management efforts, it also provides pastors, principals and emerging boards a benchmark to strive towards.

To communicate the progress and successes of the schools throughout the Brooklyn Diocese, RA also assisted in the creation of a quarterly newsletter, *The Board Journal*, which is distributed to all pastors, principals and lay board members. Regular sections include "Here and There," which profiles a board success in Brooklyn and one elsewhere in the country; reviews and updates on training; best practices; a Principal's Corner; an updated list of schools with boards; and a letter from the superintendent.

Rather than simply engage in an effort to address immediate needs, boards are being asked to plan for the school's growth and future through real business and development strategies and to work to ensure the delivery of Catholic education throughout the Diocese. In the first half of 2007, Ruotolo Associates, representatives from the Superintendent's Office and select board members with related expertise will meet to develop the materials and training that will allow each board and school to craft their own business plan.

This plan—to grow the business of Catholic education—along with all the other work RA has facilitated in the Diocese has been closely coordinated with the superintendent and his field staff, as well as the pastors and principals. "The assistance of RA has been invaluable in our efforts these past few years," said Rev. Msgr. Michael Hardiman, Vicar for Education for the Diocese of Brooklyn. "The sage advice and sound guidance from all those involved, but especially from [Chairman and CEO] George Ruotolo and [Senior Vice President] Theresa Shubeck, along with the hands-on work of [Associate] Doug Held have made my life as a Vicar so much easier."

CONGRATULATIONS TO OUR CLIENT

The New Jersey SEEDS Scholars Program recently received the Mutual of America 2006 Community Partnership Award. The award honors the contributions that non-profits—working in partnership



with public, private and other social service organizations—make to society. In cooperation with more than 100 independent secondary schools, the New Jersey SEEDS Scholars Program provides a private school education for academically talented but economically disadvantaged students. Ruotolo Associates conducted SEEDS' first campaign, which raised \$6 million, and is currently supplying strategic counsel for a \$7 million campaign. Additionally, the firm has provided interim director of development services and conducted a search for a new director of development.

NEWS TO NOTE

With the explosion of information available through both electronic and print publications, it can be difficult to keep up with all that is going on in the philanthropic community. In this new section of *Netlinks*, we will provide links to some articles that we have found informative and useful in our work. If you come across any information you would like to share with our readers, please e-mail them to info@ruotoloassoc.com.

- *Exempt*, a new magazine from the publisher of *The Nonprofit Times*, is for CEOs, CFOs, Development Officers and board members responsible for the endowment, asset and financial management of the nation's largest nonprofits. In-depth articles focus on high-end thinking regarding asset management, planned-giving, donor-advised funds, banking, risk management, investments, insurance, trusts, financial software and technology. For more information, visit <http://www.exemptmagazine.com>.
- Public Libraries Contribute to Local Economic Development, Study Finds, from *Philanthropy News Digest* (<http://foundationcenter.org/pnd/news/story.jhtml?id=167100004>)
- Record-Breaking Giving: More than 20 Americans contributed at least \$100-million to charity last year, a Chronicle survey finds, from the *Chronicle of Philanthropy* (<http://philanthropy.com/free/articles/v19/i09/09000601.htm>)

STAFF HIGHLIGHTS

Todd Gibbs Receives Tim Manning Culture of Excellence Award

Each year, Ruotolo Associates bestows upon one of its employees the Tim Manning Culture of Excellence Award for outstanding professional practice on behalf of the firm. The award is named for our late and dear friend, Tim Manning, who demonstrated an outstanding commitment to philanthropy.

At the firm's December 2006 holiday party, President and Chief Executive Officer George C. Ruotolo, Jr., CFRE, presented the 18th annual award to Todd Gibbs, who joined the firm in 2004. "I am pleased to present this award to Todd, who has helped a variety of non-profits exceed their goals during his tenure with RA," said Mr. Ruotolo.

When presenting the award, Mr. Ruotolo also announced Todd's appointment as head of the firm's Church Division. See article above for more details.

Welcome to our Newest Associate

Jason Etheridge has joined the firm's New England Division. His fundraising experience includes directing capital campaigns, developing strategic plans, coordinating events and working with fundraising software and analyzing complex databases to define appropriate fundraising practices. He has managed and participated in numerous feasibility studies and several multi-million dollar fundraising efforts. His experience includes educational institutions, hospitals, churches, shelters and historical societies. Jason attended St. John's Seminary and Boston College. He resides in East Boston.

Publications and Presentations by Ruotolo Associates' Staff

An article about strategic planning, penned by Senior Associate Audrey DeLoffi, was published in the December 2006 *Dimensions*, a publication of the National Catholic Development Conference.

Senior Vice President Theresa Shubeck had two pieces in the January 2007 *Dimensions*. The first, "From Data Mining to Cultivation," was based on a presentation that Theresa and Susan E. Boyette, president of MaGIC, Inc., made at the NCDC Greater New York Regional in Sparkill, NY, in May 2006. The other was the answer to the Question of the Month: What does data mining mean to your organization?



Last year, Senior Associate Pam DeLuca spoke at the Diocese of Cleveland's Partners for Sacred Places gathering. Ruotolo Associates has joined with Partners for Sacred Places, a national, non-profit organization headquartered in Philadelphia, to train clusters of congregations on how to broaden their sources of funding for capital repairs and community programs. The training program is called New Dollars/New Partners, and it focuses on congregations with older or historic properties. Pam also attended the Episcopal Diocese of New Jersey Annual Convention on March 2 and 3 in Cherry Hill, NJ.



UPCOMING EVENTS

April 26, 2007

Gift Planning Conference of New Jersey
Sheraton at Woodbridge Place
Iselin, NJ

April 29-May 1, 2007

Association for Healthcare Philanthropy
The Westin St. Louis
St. Louis, MO

July 12-15, 2007

Giving Institute
Summer Institute
Marriott Hilton Head Beach and Resort
Hilton Head, SC

September 13-16, 2007

National Catholic Development Conference
Annual Conference
Arizona Biltmore Resort & Spa
Phoenix, AZ

September 23-26, 2007

International Catholic Stewardship Council
Annual Conference
Miami Beach Conference Center
Miami Beach, FL



CURRENT CLIENT LISTING

- Archbishop Stepinac High School, White Plains, NY
- Bishop McNamara High School, Forestville, MD
- Blessed Stephen Bellesini, O.S.A. Academy, Lawrence, MA
- Carmel of the Incarnation, Beacon, NY
- 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
- First Congregational Church, Dudley, MA
- Flint Public Library, Middleton, MA
- Freedom House Foundation, Glen Gardner, NJ
- Gloucester Lyceum and Sawyer Free Library, Gloucester, MA
- Grace Episcopal Church, Millbrook, NY
- Great Falls Central Catholic High School, Great Falls, MT
- Great Swamp Watershed Association, Morristown, NJ
- Help for Abused Women and Their Children, Inc., Salem, MA
- Islamic Society of Central Jersey, Monmouth Junction, NJ
- 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
- New Jersey SEEDS, Newark, NJ
- Niagara University, Niagara, 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
- Queen of Peace High School, North Arlington, NJ
- St. Francis Parish, Nixa, MO
- St. Helena Parish, Edison, NJ
- St. John the Evangelist Parish, North Chelmsford, MA
- St. John's Health System, Springfield, MO
- St. Joseph Parish, North Plainfield, NJ
- St. Mary's Parish, Holliston, MA
- St. Paul's Memorial Church, Staten Island, NY
- St. Thomas Aquinas High School, Dover, NH
- The Friendship Service Center, Inc., New Britain, CT
- The Thursday Morning Club, Madison, NJ
- Union County Arts Center, Rahway, NJ
- Warren County Community College Foundation, Washington, NJ
- Woods Services Foundation, Langhorne, PA
- YMCA of the North Shore, Beverly, MA

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