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CONTENTS

- Executive Vice President Theresa Shubeck Wins Outstanding Fundraiser Award
- Merrimack Valley Hospice Breaks Ground
- The Birth of a Non-Profit
- News to Note
- Staff Highlights
- Upcoming Events
- Current Client Listing

EXECUTIVE VICE PRESIDENT THERESA SHUBECK WINS OUTSTANDING FUNDRAISER AWARD



Theresa A. Shubeck, Executive Vice President of Ruotolo Associates, recently received the Robert J. Smythe Outstanding Professional Fundraiser Award from the Association of Fundraising Professionals-New Jersey Chapter. The award was presented at the AFP-NJ Annual Awards Dinner, held May 6, 2008, at the Crystal Plaza in Livingston, NJ.

The award is named in memory of Robert J. Smythe, a longstanding member of the New Jersey Chapter of the Association of Fundraising Professionals who exemplified dedication and service to the non-profit and fundraising community. The award recognizes an individual who brings honor, distinction and a distinguished record of excellence in philanthropy.

“Theresa’s contribution to the growth of Ruotolo Associates and our collective ability to serve our clients is without peer,” said George C. Ruotolo, Jr., CFRE, Chairman and Chief Executive Officer of Ruotolo Associates. “I congratulate her on behalf of the entire Ruotolo Associates’ team and family.”

“Theresa’s commitment and dedication to her clients earned her this prestigious AFP award,” said Jay Caporale, CFRE, President and Chief Operating Officer of Ruotolo Associates. “Each non-profit that Theresa has worked with has benefited from her insights and leadership during her 13-year tenure with our firm. Her enthusiasm and passion for philanthropy are infectious, and we are privileged to have Theresa on our

executive team.”

Theresa has 25 years of development, public relations and administrative experience in secondary schools, higher education, churches and social services organizations. Her background includes capital campaigns, planning and feasibility studies, comprehensive development programs, marketing, board development, seminars, student recruitment, annual funds, strategic planning, special events and alumni relations.

Theresa was nominated for the award by Mr. Leslie C. Quick III, Founding Partner of Massey Quick Wealth Advocates. Mr. Quick worked closely with Theresa when he chaired a debt-reduction campaign for Our Lady of Perpetual Help Parish in Bernardsville, NJ, a Ruotolo Associates’ client. Theresa oversaw the project, which exceeded goal and raised more than \$4 million.

“I greatly respect Theresa as an extraordinary fundraising executive and consultant who truly brings honor, dedication and distinction to the profession,” said Mr. Quick in his letter nominating her for the award. “What struck me above all was Theresa’s professional integrity and personal commitment to us and our campaign. She understood that we must succeed, and she worked tirelessly to counsel, advise, encourage and facilitate our success. Her extensive body of knowledge and experience was evident as she guided us in implementing best practices and positioning our parish for long-term financial health.”

In accepting the award, Theresa shared a story about her mother, who is recently deceased. “After my mother became ill, she tucked a message to us where she knew we would later find it,” Shubeck shared. “She wrote, ‘The best honor you can give me is to be good to those around you.’ With great humbleness, I suggest that is at the essence of philanthropy, simply but profoundly stated. We, as individuals, a community and a culture, should be good to those around us.”

Theresa is the second member of Ruotolo Associates to win the prestigious Robert J. Smythe Award. Mr. Ruotolo, who founded the firm in 1979, received this distinction in 2005.

Theresa resides in Linden, NJ, with her daughter. She is currently a Board member of AFP-NJ and is a former Board member of Morris Habitat for Humanity. At St. Michael’s School in Cranford, she is involved in the Children’s Liturgy program. Theresa also speaks at Families Thru International Adoption seminars for prospective adoptive parents and volunteers with Families with Children from China.

MERRIMACK VALLEY HOSPICE BREAKS GROUND

By Jay Caporale, CFRE, President and Chief Operating Officer

On April 16, 2008, Merrimack Valley Hospice broke ground for the first hospice house in the area. Currently serving more than 80 communities throughout northeastern Massachusetts, the Merrimack Valley, and southern New Hampshire, the hospice house will offer 24-hour nursing care for patients—one of only six hospices in Massachusetts to offer this level of hospice care. It is the culmination of nearly eight years of visioning and planning.



The hospice house will meet the needs of terminally ill patients who can no longer remain at home, but wish to spend their remaining days in a home-like setting surrounded by friends and family. Everyone served in the home will receive the services and support needed to be as comfortable as possible, from state-of-the-art pain management to providing for each person's spiritual needs. The house will include 14 private rooms for patients, including specially designed rooms for children. Construction has begun, and a grand opening is expected in the spring of 2009.

Ruotolo Associates conducted a feasibility study in 2005 and, after a period of cultivation and education, the campaign now is in the quiet phase. To date, the campaign has received the largest philanthropic gifts in the 103-year history of the Home Health Foundation, the parent organization. Significantly, the administration and staff have pledged \$171,000.

“When Merrimack Valley Hospice was looking for campaign counsel to lead this effort, our very first capital campaign, we interviewed several prestigious firms,” said Joan Stygles Hull, RN, MBA, President and CEO of the Home Health Foundation. “Jay Caporale and the staff of Ruotolo Associates were clearly the most knowledgeable and professional. The firm has worked well with our board of trustees, campaign volunteers and our development staff; they truly are teaching us how to raise money. We appreciate their keen understanding of philanthropy and our community.”

On behalf of Ruotolo Associates, I would like to congratulate the board of trustees, Ms. Stygles Hull, Campaign Co-Chairs Dave Nesbitt and Al Torrasi, as well as the entire development staff for their vision and leadership.

THE BIRTH OF A NON-PROFIT

By Ken Gentner, Associate

Editor's Note: Ken helped establish On Eagle's Wings and continues to work with the non-profit.

On Eagle's Wings first found life in 1999 as the outgrowth of prior work of Lutheran Pastor Lee Berry. Its mission is providing a Christian ministry of presence to people in remote and isolated areas of northern Canada. Originally from New Jersey and educated at Muhlenberg College and Lutheran Theological Seminary at Philadelphia, Pastor Berry has ministered to native communities in the Northwest Territories of Canada since the early 1980s, developing strong relationships with Dene people who had been converted to Christianity by French missionaries 150 years ago.



I first met Lee in those early days when he visited from Yellowknife. He embodied an unusual combination of ordained minister and accomplished bush pilot. Lee recalls his earliest days in the North, when he landed his airplane in a small Dogrib Indian community and approached the Catholic priest there, Father Jean Pochat. "Hi, I'm the new Lutheran pastor," said Lee, dressed in an Eddie Bauer parka and fresh clerical collar, to Father Jean. Father Jean quickly recognized a greenhorn who might not yet understand his true mission and replied, "Do you believe in Jesus Christ?" To which Lee answered "yes" and with that, Father Jean then said, "Good! Let's get to work." It began a 25-year friendship and collaboration.

On Eagle's Wings might never have come to exist had it not been that Lee was distraught in 1998. By then, the organization for which he flew from his base in Yellowknife was struggling. Doctrinaire and rigid behavior by its executive director were leading to severe trouble with board governance. The people being served, as well as many donors, had become alienated. Lee's fellow pastor-pilots were leaving their missions, seeking the solace and dependability of regular "calls" to churches elsewhere. But Lee was very troubled at the prospect of abandoning the people he had come to know and love.

He then approached me and others for help. I could certainly appreciate both the organizational challenges and daunting task of reinventing Lee's mission in a new, broader Christian context, which we envisioned would span all kinds of denominations.

The Canadian North is home to Anglican and Roman Catholic communities. With their churches struggling under severe financial burdens, they can no longer supply priests into the communities where On Eagle's Wings serves. Making our organization an ecumenical force of support for these existing churches was a paramount goal. But, Lee was a pastor, not an executive director, and he needed the talent and resources of a strong organization behind him.

Initially, we had several simultaneous goals:

- Preserve existing funding from friends—both individuals and parishes/congregations.
- Get an airplane. (Remember, there are no roads!)
- Organize quickly in the United States and Canada as recognized charities.
- Build capable boards of directors.
- Establish governance policies that would stand in good stead with supporters.
- Grow our membership to help fund our missions (and grow the “fingerprint” of our mission in more places).

These all seemed nearly insurmountable to us. At early meetings of the interim board (before the United States and Canadian charities were set up), there was always discussion about “How are we going to do this?” My mantra then was “one step at a time!”

While the organization made steady progress, it was not without some challenging hazards and setbacks along the way. Decision making about personnel and hiring, deciding whether to rent or purchase office space, obtaining and paying for aircraft, and many other choices were hard ones. But, through it all, an enduring sense of fulfilling God’s mission was pervasive.

The young life of any organization is never easy. Threats arise from all corners and, of course, the biggest challenge is money, both getting it and spending it wisely. Here are some things we learned:

- Get up and running fast: don’t allow bureaucracy and policy-setting to take precedence over mission and action.
- Build up by growing out of your core of support.
- Get the best help and counsel you can; use your network to identify those groups.
- Hire carefully, based on energy and values; it’s not about words, but deeds.
- Find strong board members as quickly as possible. Recruit them based on their skills and ability to contribute (time, talent, money) to further the health of the organization.
- Keep a keen eye on the future: where you need to go with mission, what infrastructure you need to support it and who will best help you get there (in terms of membership, significant donors and constituencies of all sorts).
- Build new and capable leaders within the organization and recruit people to the cause externally by telling the organization’s story with passion and zeal.

In the case of On Eagle’s Wings, some of these lessons were hard to learn and even required re-learning. Nevertheless, in barely nine years, we have a long list of accomplishments:

- Two strong and vital boards of directors in both the United States and Canada.
- Six Christian denominations represented among volunteers and staff.

- Two airplanes (paid-for).
- Four volunteer commercial pilots.
- Partnerships with regional air carriers.
- An office condo in Edmonton, which helps protect the organization from skyrocketing real estate costs.
- Two staffed ministry bases in Fort McMurray, Alberta, and Yellowknife, Northwest Territory.
- 32 communities served with summer Bible schools (up from 15); 1,500 children taught in the summer of 2007
- 67 native teachers participating in Bible schools this year (up from zero).
- Native lay people in a dozen communities using our year-round Sunday school curriculum to pass their faith to the next generation.
- More than 1,800 individual and 225 congregational supporters.
- 55,000 Advent devotion booklets distributed at no cost throughout the United States and Canada, and a newsletter twice yearly to more than 6,000 recipients.

As you might surmise, Lee discovered strengths he did not know he possessed. He grew into a tireless executive director who also excelled at development. This was in no small measure the result of his “on the ground” experiences and authentic, personal style. Success came from a lot of effort by everyone. So, if you are involved in the birth (or re-birth) of a non-profit, you would do well to take the lesson of Father Jean’s to heart: “Good! Let’s get to work.”

NEWS TO NOTE

We thought you might be interested in reading more about these philanthropic topics.

Ethics is Still a Hot-Button Issue in Philanthropy, New Study by Giving Institute: Leading Consultants to Non-Profits Finds

(http://www.afpnet.org/ka/ka-3.cfm?folder_id=2545&content_item_id=24432)

The IRS has begun to distribute its one-time tax rebates to eligible taxpayers. For more information about encouraging your constituents to donate some of their rebate to your organization, visit this Web site.

(<http://www.sharpenet.com/taxrebatesandgiving/>)

Survey Shows Growing Dissatisfaction among Small Colleges with Trustees' Fundraising Knowledge, Involvement

(<http://www.case.org/Content/PressRelease/Display.cfm?CONTENTITEMID=8017>)

STAFF HIGHLIGHTS

RA Welcomes New Employees

During the past several months, Ruotolo Associates has welcomed three new associates to its team.

Cathi Coridan brings more than 30 years of experience to RA. She specializes in project management, training and technical assistance for human service and education programs to enhance the effectiveness of fund development, human resource development, risk management, transition management, leadership training and Board development.



Cathi is an outspoken advocate for children and families—especially those whom the system forgets. She is a board member of the Connecticut Association of Nonprofits and a member of the Connecticut Chapter of the Association of Fundraising Professionals. Cathi and her husband, Ned Hogan, reside in Portland, CT.

Melissa Lynch has extensive experience in fundraising, events, management and marketing. Her development work includes capital campaigns, vote initiatives, annual appeals, grant research and strategic planning. As a consultant for the Gloucester Lyceum & Sawyer Free Library in Massachusetts, Melissa managed a \$15 million renovation and expansion project. In this role, she spearheaded a political campaign for the city's funding of the project, formed and advised volunteer committees, led donor cultivation and implemented the annual appeal for businesses and individuals.

Melissa has been a guest lecturer for several colleges and organizations on event management and careers in sports and currently serves on the Alumni Advisory Board for her graduate program at Ohio University. Melissa lives in Peabody, MA, with her husband, Brian.

Gaiana Swanson comes to Ruotolo Associates with a demonstrated commitment to the field of development, having served as director of development at three Catholic high schools and one religious community. In these positions, Gaiana was responsible for conducting annual funds, public relations, planned giving, alumni programs, event planning and student financial aid programs. She has established and worked closely with volunteer boards in various capacities. She was also instrumental in identifying and recruiting lay talent to serve a religious community.

Gaiana is a member of the New Jersey Chapter of the Association of Fundraising Professionals. She has also served on the Professional Development Committee of the National Catholic Development Conference. She resides in Montclair, NJ.

Other Staff News

Executive Vice President Theresa Shubeck will be the June speaker at Mercer County's Women in Development meeting.

Ruotolo Associates is seeking to hire development professionals with experience in capital campaigns and comprehensive development programs. For additional information, please e-mail info@ruotoloassoc.com.

UPCOMING EVENTS

June 13, 2008

Fund Raising Day in New York
Marriott Marquis Hotel
1535 Broadway
New York, NY

July 17-20, 2008

Giving Institute
2008 Summer Symposium
Stein Erikson Lodge
Park City, UT

September 28-October 1, 2008

40th Annual NCDC & Exposition
Walt Disney Resort
Orlando, FL

October 12-14, 2008

ICSC
Hyatt Regency
Chicago, IL

November 13, 2008

AFP-CT Philanthropy Day Conference
Trumbull Marriott
Merritt Parkway
Trumbull, CT

CURRENT CLIENT LISTING AND SERVICES PROVIDED

- Archbishop Stepinac High School, White Plains, NY: *Capital Campaign Counsel*
- Arlington Catholic High School, Arlington, MA: *Planning Study*
- Bethany Spirituality Center, Highland Mills, NY: *Feasibility Study and Market Analysis*

- ❑ Bishop Fenwick High School, Peabody, MA: *Advancement Office Management*
- ❑ Carmel of the Incarnation, Beacon, NY: *Development Counsel*
- ❑ Casita Maria, Inc., Bronx, NY: *Development Counsel*
- ❑ Cathedral High School, Springfield, MA: *Feasibility Study/Student Recruitment Assessment and Strategic Counsel*
- ❑ Catholic Network of Volunteer Services, Takoma Park, MD: *Feasibility Study*
- ❑ Clapp Memorial Library, Belchertown, MA: *Capital Campaign Training Sessions*
- ❑ Dominican Fathers, Province of St. Joseph, NY, NY: *Advancement Program Counsel*
- ❑ Dominican Nuns of Summit, Summit, NJ: *Feasibility Study and Capital Campaign Counsel*
- ❑ Dominican Sisters of Hope, Ossining, NY: *Development Program Assessment, Search for Director of Development and Development Program Counsel*
- ❑ Elizabeth Seton Pediatric Center, NY, NY: *Creation of Case Statement/Development Package and Capital Campaign Counsel*
- ❑ Father Judge High School for Boys, Philadelphia, PA: *Institutional Advancement Program Assessment*
- ❑ Franciscan Monastery of St. Clare, Greenville, SC: *Capital Campaign*
- ❑ Freedom House Foundation, Glen Gardner, NJ: *Comprehensive Development Program*
- ❑ Great Falls Central Catholic High School, Great Falls, MT: *Campaign Counsel*
- ❑ Guardian Angel Parish, Allendale, NJ: *Capital Campaign Counsel*
- ❑ Hampden-Wilbraham Regional School District, Wilbraham, MA: *Communications Initiative*
- ❑ Immaculate Conception Parish, Annandale, NJ: *Planning Study and Capital Campaign Counsel*
- ❑ Julie's Family Learning Program, Inc., South Boston, MA: *Major Gifts Program*
- ❑ Mercy Hospital of Tiffin, Tiffin, OH: *Capital Campaign Counsel*
- ❑ Merrimack Valley Hospice, Lawrence, MA: *Capital Campaign Counsel*
- ❑ Niagara Catholic High School, Niagara Falls, NY: *Planning Study/Institutional Advancement Office and Marketing/Student Recruitment Assessment*
- ❑ Niagara University, Niagara, NY: *Campaign Counsel*
- ❑ Notre Dame High School, Easton, PA: *Development Program Counsel*
- ❑ Palisades Medical Center Foundation, North Bergen, NJ: *Capital Campaign Counsel*
- ❑ Ronkonkoma Cenacle, Inc. (Cenacle Retreat House), Ronkonkoma, NY: *Planning Study*
- ❑ St. Aloysius Parish, Pottstown, PA: *Planning Study and Capital Campaign Counsel*
- ❑ St. John's Episcopal Cathedral, Denver, CO: *Feasibility Study*
- ❑ St. Helena's Parish, Edison, NJ: *Capital Campaign Counsel*
- ❑ St. Joseph's Parish, Medford, MA: *Planning Study and Capital Campaign Counsel*
- ❑ St. Raymond's High School for Boys, Bronx, NY: *Planning Study, Development Program Assessment and Capital Campaign Counsel*
- ❑ St. Theresa of Lisieux Parish, Sherborn, MA: *Planning Study and Capital Campaign Counsel*
- ❑ SMA Fathers, American Province, Tenafly, NJ: *Development Program Assessment*
- ❑ Trinity Episcopal Church, New Haven, CT: *Planning Study and Capital Campaign*
- ❑ Villa Maria Academy, Bronx, NY: *Major Gifts Program*

- VNA Care Network, Inc., Worcester, MA: *Feasibility Study*
- West Bergen Mental Healthcare, Ridgewood, NJ: *Capital Campaign Counsel*
- Westwood Public Library, Westwood, MA: *Feasibility Study*
- Woods Services Foundation, Langhorne, PA: *Campaign Counsel*
- Zion Episcopal Church, Wappingers Falls, NY: *Planning Study and Capital Campaign Counsel*

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