

Netlinks

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Team Work Triumphs In Hard Times Trinity Montessori School, Rochester, NY



In the midst of this historic economic recession, Trinity Montessori School in Rochester, NY, recently completed a successful \$1.8M Capital Campaign and broke ground in June to build its beautiful new school on a 7.5-acre land parcel purchased

from the Sisters of Saint Joseph of Rochester. Its 220 students and 38 staff plan to move in after the winter break.

When asked why the campaign was so successful, Lorraine Scarafile, Trinity's Head of School, said there were two reasons. The first is that they intentionally created a strong collaboration

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among all of the expert partners. She wanted, and says she got, "the best Campaign Consultant, Campaign Cabinet, designers, architects and contractor. They were like a dream team, tireless in their efforts for success."

Second, they connected the campaign to the mission of the school in as many ways as possible. "Our students are going to make a difference in our world! What we give them now as a holistic education needs to be at the center and drive all we do - including our fundraising!" The spirit of the campaign was kept fresh and in focus by involving the students and ensuring that events reflected a child-like spirit.



The children brought their own shovels and tool belts to the ground breaking and participated in a day long "Cinderella's Missing Slipper" fundraiser. This creative event was sponsored by a local shoe store, owned by parents of one of the children, which donated proceeds from a one day sale. "Sales were great," says Scarafile, "but the success was measured not just in money made, but parts of our school

community connected with each other and the larger community in a way that celebrated our children."

"This campaign succeeded because of leadership," says Doug Held, Vice President of Ruotolo Associates who worked with the school on the project as the Campaign Consultant. "We often talk about needing one dynamic person to drive staff and volunteers but here we had a high level of commitment and leadership from Lorraine and John, but also amongst the cabinet. Whenever we hit a rough spot - and they always happen - someone stepped forward, took on more, and inspired others to do the same."

Ms. Scarafile says that she cannot emphasize strongly enough that "everyone needs to have campaign specialists come in and guide the leadership through the entire process." Chrissie Cottier, parent, Board member and member of the Campaign Cabinet added, "Doug pulled us all together, providing strategy, structure and direction, and kept us motivated to put in the extra



Ruotolo Associates Inc. is a working partner with non-profit organizations, providing them with the highest quality consulting for fundraising, stewardship, public relations and related management services through individualized creative strategies and solutions.

To learn more about the firm, visit our Web site at [Ruotolo Associates](http://www.ruotoloassociates.com).

Staff News

Milissa Else Promoted to Senior Associate

Ruotolo Associates is pleased to announce that Milissa Else has been promoted to Senior Associate.

Milissa has been a member of the RA team since 1997. She has worked with a variety of clients conducting planning studies, consulting on capital campaigns

hours to reach an aggressive goal in a short period of time."

At Trinity, they were challenged by having a very small constituency from which to draw. Ms. Scarafile says that even with that small number, the giving was generous: parents of alumni gave on a personal and generous level; 100% of the teachers and 100% of the Board contributed; and 85% of current parents made donations, "which says a lot about belief in this project and their commitment to quality education for their kids and children of the future."

After spending 40 years renting space that was not truly suited to their needs, this campaign has allowed Trinity to move into the only building in Western New York designed and built specifically for Montessori programming, with "green design" elements throughout. Board and Campaign Chair John Anderson encourages other nonprofit leaders "to be optimistic, even in these tough economic times because people will continue to support high quality programs that benefit their community."

Looking To The Future

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

Many are familiar with the ancient Chinese proverb that says "may you live in interesting times." The current economic situation certainly makes this an interesting time in our industry and for the nonprofit community that we serve: a time to stay true to our core values and mission and to build from positions of strength. At RA, our strength for over 30 years has been in our dynamic, team-based approach to excellence in services for our clients. We pride ourselves in the diversity of education, skills and backgrounds of our associates - bringing individuals from the nonprofit, corporate, philanthropic, and education fields together to consistently provide innovative and exceptional consulting services.



and directing strategic planning efforts. She has also designed and installed campaign database software programs for many of Ruotolo Associates' clients.

"Milissa's diverse development background and her intelligent and thoughtful approach to the individual needs of our clients make her an increasingly valuable asset to our team," noted Chairman and CEO George Ruotolo. Her focus is going to remain on the faith community and church related development.

Milissa graduated Magna Cum Laude with a BA in Spanish from Mount Holyoke College, and is a member of Phi Beta Kappa. She is news-letter editor and membership coordinator of Mount Holyoke Club of Bergen-Passaic. Milissa and her husband, Bert, along

As CEO, I am delighted to announce that we recently named Doug Held as Vice President. As a member of the Executive Team, Doug will work with Theresa Shubeck, Executive Vice President and me to ensure the ongoing high quality of RA services and the strategic growth of the company. Doug will be responsible for marketing efforts and supervising staff while continuing to provide a full array of development services to RA clients.



Doug has been a valuable member of the RA team since 2005. His work in our Mid-Atlantic Division has included capital campaigns, planning/feasibility studies, major gift initiatives, volunteer training and development assessments for libraries, alumni associations, schools, churches and social service agencies across the Northeast.

His diverse work experience in the nonprofit sector is complemented by his solid leadership skills and easy interpersonal style.

Doug, a resident of Morris Township, is a graduate of the University of Scranton, where he was a four-year recipient of a Presidential scholarship for the debate team. In 2008, Doug received Ruotolo Associates' Tim Manning Culture of Excellence Award. If you want to learn more about Doug's work, it is spotlighted in the article above about Trinity Montessori School.

Benjamin Franklin stated that "without continual growth and progress, such words as improvement, achievement, and success have no meaning." Growth in the months ahead is going to look different from what we have been used to in the past. New public-private partnerships and collaborative teams will emerge to strengthen the communities across the country. RA intends to have a strong presence alongside our nonprofit partners in building a future filled with achievement and success.

with their two children, live in Rutherford, New Jersey.

Ned Hogan, CFRE Joins RA as Associate

Edward T. (Ned) Hogan joined the Ruotolo Team this summer. For the past 13 years, Ned has held Development Director positions at affordable housing, education, and child welfare organizations in Washington, D.C. and New England.

He is Past Chair of the Association of Fundraising Professionals (AFP) of CT, and serves on AFP International's Committee on Directorship.

Ned is a seasoned trainer and presenter at local and regional fundraising conferences and educational sessions, speaking on Starting a Development Program, Prioritizing Development Activities in a One

The Strength of the Nonprofit Sector in the "New Economy"

Many are trying to forecast the future. The economy is being shaped by the experiences of the last two years, the lessons learned during the hardest times in the recession. This "new economy" is based on assumptions of long-term at-or-near double digit unemployment, a continued increase in need for services that nonprofits provide, and an inability for nonprofits to rely on traditional revenue sources, such as foundations and government funding to keep them solvent.

Pat Nichols of Transition Leadership International advises nonprofit CEOs, "Emerging from the recession should be a time of revival, not of reversion, of leading your organization - leaner, harder, sharper, more rigorous - into a new era. Don't try to return to normal. Your organization, like the macro-economy, is entering a new normal." (Chronicle for Philanthropy, 11/12/09) Nonprofit leaders, like their for-profit counterparts are well advised to understand the critical roles of the nonprofit sector and importance of novel partnerships and innovations in defining this "new normal."

Over the past few years, there has been a shift in perception of the nonprofit sector from being a collection of "charities that do good work in the community" to critical players that employ, support and educate the community. An often overlooked factor is the nonprofit sector's sheer size. Philanthropy Reports has issued an insightful new report including these powerful statistics:

- There are 2 million nonprofits in the U.S.; that is double what it was 15 years ago.
- There are 70,000 foundations in the U.S.; five of the ten largest ones did not exist 50 years ago.
- Nonprofits in the U.S. generate \$1.1 trillion every year, more than the entire economies of Saudi Arabia and Sweden combined.
- One in ten workers is employed by a nonprofit organization, the majority in healthcare and education.
- Over \$300 billion is donated to nonprofits and

Person Shop, and Ethics in Fundraising. He is a former member of the Society of Jesus (Jesuits) where he served in parishes and schools as priest and educator. Ned holds a BA in History from Georgetown and MA degrees from Providence College and Weston School of Theology. He lives in Springfield, MA, with his wife Cathi.

Nancy Kennedy Joins RA as Associate

Nancy Karole Kennedy has joined RA as an Associate, bringing a unique blend of experience in corporate executive leadership, non-profit volunteerism and financial development. Nancy has worked on campaigns for local, national and international disaster relief as well as major gifts campaigns for local operational funding.

foundations each year.

Philanthropy Report's website presents an engaging YouTube video that can be used to educate local and regional communities about the nonprofit sector's impact - and its potential. (www.philanthropyreports.org)

Another model that is disappearing is the silo approach to funding and services, replaced with more opportunities for innovative alliances between sectors. These new collaboratives provide the opportunity for nonprofit leaders to initiate - rather than wait to be included - new joint ventures, focused on building local and regional economies via work force development. This is especially important, because while trends in individual, corporate and foundation giving are beginning to increase in some areas, growth is projected to be uneven, localized and more modest than in previous years.

Finally, the increasing demand in many areas for nonprofit services provides a platform of growth and leadership for nonprofits in their communities. The combination of high rates of unemployment and advances in technology means that employment training will be a critical need in the months to come. Another area of projected growth is in healthcare delivery, with the sheer number of aging baby boomers who will require services and with it, the increase in the need for trained workers in the applications of medical technology. And the recent move to allow nonprofits increased access to homes in foreclosure for affordable housing creates expanded opportunities for public-private partnerships.

The quality and increasing number of the new collaborative partnerships among foundations, nonprofits, higher education institutions, health care providers and businesses - large and small - will refine and redefine the workforce and the health of our communities, and ultimately shape this next, "new economy."

How is your nonprofit positioned as a collaborator and partner within your community? Who are the five most important people with whom you need to collaborate in the next six months? As the new economy unfolds, it will be the

She brings her expertise in running successful events and strong skills for building effective relationships with board members, donors and constituents for cultivating, sustaining and growing financial support.

Nancy is a graduate of Quinnipiac University with a BS in Human Resources Management, is a member of the Bergen County Executive Fundraisers and a Fellow of Leadership New Jersey, Class of 2009. She lives in Ridgewood, NJ, with her husband Dave.

Upcoming Events:
AFP, New Jersey Chapter, 30th Annual Conference on Philanthropy November 10 & 11, 2010, Hilton Parsippany, Parsippany, NJ
Theresa Shubeck, RA's Executive VP to moderate a panel on Board-Staff

organizations which ask - and answer - these critical questions that will be in a position to assume new leadership roles.

Ruotolo Associates has worked with over 1,000 clients and we look forward to partnering with you so that your nonprofit is ready to function in this emerging economic environment.

Social Media: 5 Rules for Success

Social media has exploded around us with Facebook, Twitter, websites, email newsletters (like this one), blogs, webinars, YouTube, phone apps, etc. Social media is no longer an add-on or an accessory; it is an integral part of communication for all organizations, for profit and nonprofit alike. Facebook now has 500 million users; Twitter has 100 million; 55 million Tweets cross the airwaves every day, 37% of them from phones. And it continues to grow on an hourly basis!

Social media apps are often free, but social media itself is not free: it requires paid or volunteer hours to research emerging best practices and get enough quality input to make good decisions. It's flashy, it's fun and it can be overwhelming to sort through the "what's new" to find "what's best and what works" for a specific organization. For nonprofits with limited budgets and even more limited time, this presents a real challenge. Ruotolo Associates offers five recommendations to help you make effective social media decisions for your organization.

- 1. Know what you are trying to achieve and use objectives to drive your strategy.** Having a blog, Facebook page or Twitter account for the sake of being "timely" is a waste of time. Oliver Blanchard, (<http://thebrandbuilder.wordpress.com>) international brand and social marketing guru states it concisely: "Having a presence alone is worthless; social media needs to move people to engage and ultimately participate" (donate, volunteer, join), or it's a waste of valuable time and money. When asked about any differences between for profit strategy and nonprofit strategy, he sums it up by saying: "revenue is revenue; budgets are budgets; money is money." If your social media does not drive the financial outcome, it's just an activity; it can be a fun, creative and engaging activity, but it will not be a profitable one.
- 2. "Take baby steps" when starting to incorporate social media into your strategy,** encourages Linda Wood of the Evelyn and Walter Haas Jr. Fund in San Francisco, in a presentation she made in a podcast for the Chronicle of Philanthropy (<http://philanthropy.com/section/Social-Good/365/>). The Haas Foundation has a strong commitment to ongoing learning from and about its community and its grantees. They developed a pilot project to highlight the work of the foundation's grantees as their initial approach to social media. Experimentation and consistent dialogue were critical as they looked for the places with the strongest responses, talked with grantees, and built their dynamic social media presence from there.
- 3. Start with what you know and trust, and then thoughtfully integrate additional social media tools to get robust**

Relationships.

AFP, Connecticut
Philanthropy Day
Conference
November 18, 2010,
Holiday Inn, Waterbury,
CT

AFP, Mass Chapter
Annual Conference
December 3, 2010,
Boston Marriott-Copley

outcomes. Kivi Leroux Miller, national marketing consultant to nonprofits (www.nonprofitmarketingguide.com), strongly recommends email to start. "Email is the killer app for nonprofits! It is the single best way to communicate when you have a small staff and a limited budget." From the email newsletter platform, it is easy to add a Facebook page or Twitter account to cultivate new readership, and perhaps use one of the newsletter articles as a Blog posting. With new technology, tracking, targeting and segmenting is critical, so Kivi recommends subscribing to an email service, and suggests checking the reviews of available services on www.idealware.org.

4. **One size does not fit all!** The best selection and use of social media applications vary dramatically - or subtly, which can be just as important - from one type of organization to another, among similar organizations, and from one season to the next. Take the time to do the research on what your constituents want and need to hear and see from you, and choose the social media strategies that best meet those needs. Segment messaging when appropriate. Be sure that someone is assigned the responsibility to set applications up, run them and effectively respond to questions and information generated from constituent feedback. Keep social media sites current; stale blogs and websites are worse than not having any. Establish the metrics to measure the outcomes, and then follow through and use that data to inform all growth or change in social media use.

5. **Before pushing the send button to launch a blog, Facebook page, etc, establish specific social media guidelines to promote your organization/brand/campaign.** Boundaries need to be clearly defined for staff and volunteers who use the organization's social media applications, as they represent the mission and the brand to the outside world. Use of personal social media accounts to friend or comment on an organizational post, e.g., an agency's Facebook Page, must be addressed as well, remembering that the Internet is forever and can be unforgiving of mistakes. Once a message, posting, blog or Tweet is sent, it becomes accessible to everyone with a computer as an enduring reflection on the mission and work of the organization.

STAFF PROFILE

In his work with RA clients, John Uzzi brings extensive experience in corporate consulting as the President of R.W. Walters Associates, where he has worked for over 30 years with leading organizations, navigating large scale "change through improvement" initiatives. He believes that the value he brings to his work for Ruotolo clients is a strategic, corporate perspective and dimension to create new synergy where "1+1=3." This impressive corporate



background is combined with generous service as a volunteer nonprofit leader that led to his being awarded the Volunteer Leader Award by the Governor of NJ in 2004.

From this unique vantage point, John observes two trends at the nexus of the for profit and nonprofit sectors. The first is a commitment by the corporate sector to be a stronger partner in support of the nonprofit organizations they fund. This is done, for example, through employee volunteer support from "done in a day" kinds of projects up through the commitment of Board service. The second is that nonprofits engage in partnerships with corporations to obtain expertise for running the business-side of the nonprofit corporation. John believes "these mutually beneficial partnerships enhance both sectors, and strengthen our communities in the process."

John is happy that he is able to "play a small part in helping people make a difference with individuals, families and in their larger communities," through the work he is currently doing with RA's clients, Morris Habitat for Humanity and Alpine Learning Group.

John is a graduate of Fordham University, has four children and three grandchildren. He and his wife Mary Ann live in Paramus, NJ.

CURRENT CLIENT LISTING AND SERVICES PROVIDED

Alpine Learning Group, Paramus, NJ: Capital Campaign
Alternatives for Battered Women, Rochester, NY: Capital Campaign

American Venous Forum, Salem, MA: Strategic Counsel

Andover Historical Society, Andover, MA: Action Study

Archbishop Stepinac High School, White Plains, NY: Capital Campaign

Bishop Loughlin Memorial High School, Brooklyn, NY: Development Program Assessment and Counsel

Diocese of Metuchen/Catholic Campus Ministry at Rutgers University, New Brunswick, NJ: Feasibility Study

Elwyn, Elwyn, PA: Development Program Counsel

Franciscan Friars, Holy Name Province, NY, NY: Major Gifts Campaign

Holy Family Parish, Gloucester, MA: Capital Campaign

La Salle Academy, New York, NY: Planning Study and Capital Campaign/Major Gifts

Leicester Public Library, Leicester, MA: Feasibility Study and Capital Campaign

Masonic Health System, Inc., Charlton, MA: Feasibility Study

Mercer Street Friends, Trenton, NJ: Feasibility Study

Morris Habitat for Humanity, Mine Hill, NJ: Development Program Assessment, Board Retreat, Executive Search, Feasibility Study, Development Program Counsel

Niagara University, Niagara, NY: Campaign Counsel

NLN Foundation for Nursing Education, New York, NY: Planning Study

Norwalk Hospital Foundation, Norwalk, CT: Development Program Assessment, Feasibility Study, Board Retreat, and Capital Campaign

Our Lady of Perpetual Help Parish, Bernardsville, NJ: Campaign Counsel

Our Lady of Victory Homes of Charity, Lackawanna, NY: Development Program Assessment

Project Morry, White Plains, NY: Feasibility Study and Capital Campaign

St. Bonaventure Parish, Manomet, MA: Feasibility Study

St. John Neumann Parish, Lancaster, PA: Feasibility Study and Capital Campaign

St. John's Episcopal Cathedral, Denver, CO: Feasibility Study and Capital Campaign

St. John the Evangelist Parish, N. Chelmsford, MA: Increased Income Program

St. Joseph the Worker Parish, Ozark, MO: Feasibility Study and Capital Campaign

St. Mary Parish, Chelmsford, MA: Planning Study

St. Raymond High School for Boys, Bronx, NY: Planning Study, Development Program Assessment and Capital Campaign

The Brothers of the Christian Schools, District of Eastern North America, Eatontown, NJ: Development Program Counsel

The Seamen's Church Institute, New York, NY: Development Program Assessment

Wareham Library Foundation, E. Wareham, MA: Annual Appeal

YMCA of the North Shore, Beverly, MA: Feasibility Study

and Campaign Counsel

YCS Foundation, Inc., Hackensack, NJ: Development
Program Assessment, Board Retreat, Development Counsel

Recent RA Presentations

Sept.20, 2010, NCDC, Chicago, IL

George C. Ruotolo, Jr., and Theresa A. Shubeck on:

1. ***Ten Steps in Strategic Planning***
2. ***Lessons Learned in the New Economy***

Feb. 2010, Christian Brothers Chief Administrators Conference, New Orleans, LA.

George C. Ruotolo, Jr. on: ***Successful Fundraising or Income
Generating Strategies***

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