



Giving Forward: Planning Today for Opportunities Tomorrow

Presented by:

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Our Presenters



George C. Ruotolo, Jr., CFRE
Chair & CEO
RUOTOLO ASSOCIATES INC.

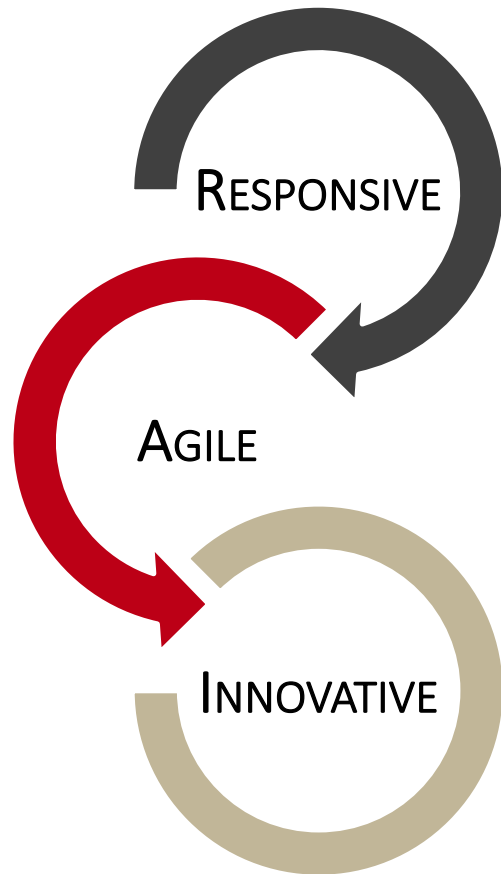


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*Vice President &
Director of Church Division*
RUOTOLO ASSOCIATES INC.



Thomas J. Smith
*Director of the Office of
Stewardship and Development*
DIOCESE OF METUCHEN

Ruotolo Associates Inc.



- Since 1979 RA has been privileged to work with Catholic parishes, dioceses, educational institutions, and religious orders located throughout the United States.
- RA has partnered with over 500 parishes, 30 religious organizations, and 22 dioceses/archdioceses
- Scope of work includes church campaigns, diocesan campaigns/appeals, stewardship initiatives, increased offertory, development assessments, feasibility studies, executive search, development counsel

Diocese of Metuchen



Represents four counties in Central New Jersey



90 Parishes with over 600,000 Catholics



Four High Schools; 23 Elementary/Middle Schools



DIOCESE OF
METUCHEN

Three Keys to Our Conversation



Timing

The When



Transparency

The Why



Tactics

The How

Three Areas to Address



Offertory



Appeals



Campaigns

The past six weeks...



**CRISIS MODE
VS. CRISIS MINDSET**



**STRESS
& CREATIVITY**

Offertory Essentials

■ Timing: Immediate call to action

- No hesitation necessary
- Website
- Social Media
- Emails



■ Transparency: Candor is King

- Be upfront about money
- Put it in writing
- Positive outlook

■ Tactics: Regular updates from leadership

- What are the needs?
- Budget updates – good and/or bad
- Video has been extremely effective

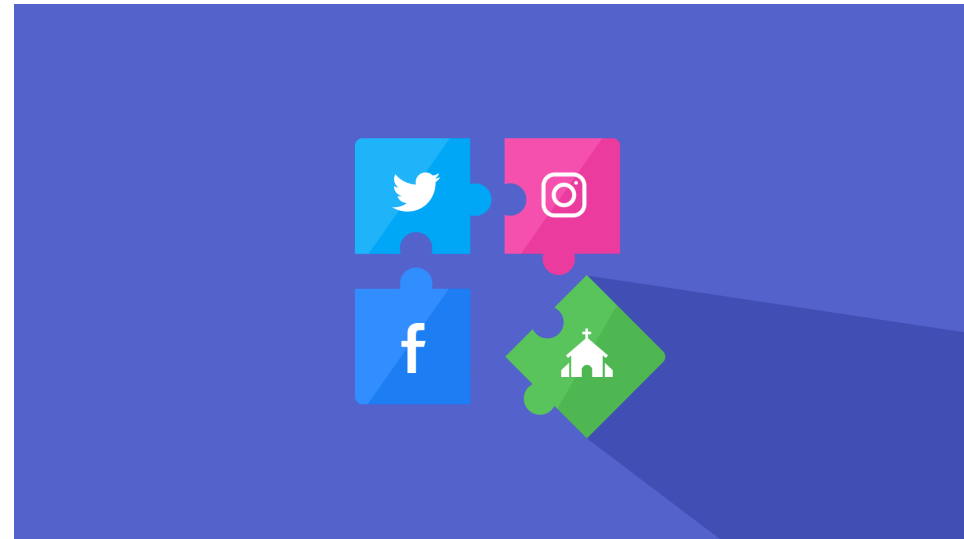
Embracing Social Media and Video

■ Facebook

- 71% of US adults log on daily
- 50% log on multiple times daily
- Seniors have doubled since 2012
- Seniors use more than other platforms

■ Instagram

- Fastest growing platform
- Age 18-24 (75%)
- Age 25-29 (57%)
- Age 30-49 (47%)



■ Video Content

- Up 258% on Facebook and 99% on YouTube since 2017
- Videos generate 1200% more "shares" than text or images
- Mobile devices causing increase

Appeals Essentials



■ Transparency: Expectations

- What has been completed?
- Comparison to 2019
- Needs for 2020

■ Timing: Staying Connected

- Parish updates
- Direct donor updates

■ Tactics: Commitment to Completion

- Potential timeline(s)
- Activities remaining
- Adjustment to messaging

Campaign Essentials (Studies)

■ Timing: Sense of urgency

- Attentive audience
- Expanded question opportunities
- Welcome distraction



■ Transparency: Moving forward

- Specify the needs
- We will be back
- Proactive approach

■ Tactics: Get it done

- 100% virtual
- Increased participation
- Use of video

Campaign Essentials (Capital Campaign)

■ Timing: Motivation and Momentum

- Dependent on timeline
- How much?
- What are the priorities?

■ Transparency: Donor-centric

- Three Tiers
- Optimism
- Organizational outlook

■ Tactics: Engagement

- Expanded timetable
- Major donors
- Technology



Keys for Communication



Acknowledge

Acknowledge the Situation

- Impact in message and tone
- Context of uncertainty, but be optimistic

Manage

Manage the Message

- Internal staff/team coordination
- Ways connection is taking place

Reframe

Reframe Opportunity

- Seek out advice from top supporters
- Demonstrate leadership

Empathy and Priority

Empathy

- Acknowledgement
- Share stories
- Careful language
- Avoid platitudes
- Don't underestimate

Priority

- Articulate needs
- Reinforce timing
- Be realistic
- Be optimistic
- Don't underestimate

Q&A

Contact Info



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Thank You!

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For the greater good.