



Your Critical 30/60/90 Day Development Strategy ...in these unprecedented times

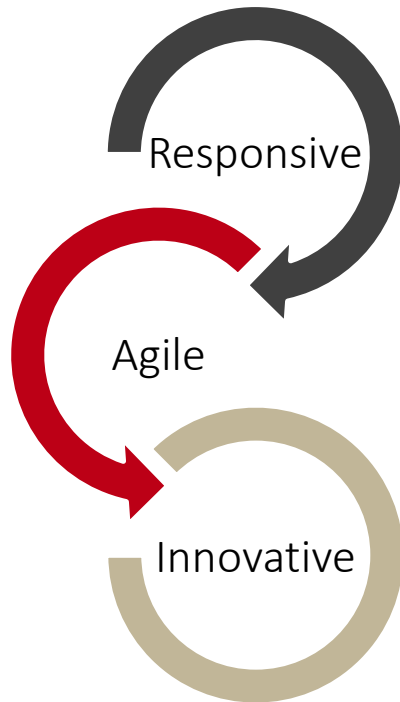
Presented by:

George C. Ruotolo, Jr., CFRE, Chair and CEO

Theresa A. Shubeck, Executive Vice President

March 26, 2020

Ruotolo Associates Inc.



- Over 40-year partnership with RA and the De La Salle Christian Brothers.
- First school client was a Lasallian HS...and have worked with 15 Lasallian institutions since then.
- Since 1979, privileged to work with Catholic educational institutions, dioceses, parishes, and religious orders located throughout the United States.
- Presently providing campaign counsel to La Salle Academy (Providence, RI), La Salle Institute (Troy, NY), and strategic planning for St. Patrick High School (Chicago, IL). We recently completed work with Christian Brothers Academy (Lincroft, NJ).

Leadership Outreach



TEMPERATURE



CONVERSATIONS



DIRECTION

Communication and Messaging



Channels

From letter to video



Who?

You?
Who else?...



Messaging – “The Power of Three”

About them
About yourself
About the Institution



Leave them with inspiration



Leadership today

When Disaster Strikes – Self-Imposed Litmus Test

December 2019

Institutions with strong relationships suffer least.

An institution may need to adjust short-term timetable (e.g. 3-4 weeks).

Most charities do not see long-term impact.

Fundraising efforts should not be stopped nor put on hold.

March 2020

Institutions with strong relationships suffer least:

- You will find out exactly the relationship you have with constituents.
- Don't sit back – you want to hear from them and vice versa.
- We want to be in relationship with them.
- During this time of strife, we can change the dynamic between our constituents and our institutions.

An institution needs to create immediate and mid-term timetable.

Immediate and near-time impact will be more profound. Proceed with fundraising with sensitivity – message and timing.

Work hard to stay among the “top 3” of charities your donors support

WHAT WE ARE HEARING FROM OUR CLIENTS

30-60-90 Days

Best practices prevail...strengthen them

- Segment
- Tailor approach and message
- Identify donors who need the most attention
- Cultivate...communicate...steward
 - TAKE THE TIME TO DO WHAT YOU “NEVER HAVE TIME FOR”
- Listen the gift

90 Days = End of fiscal year

- Review the plan – adjust for greatest impact
- LYBUNTS/SYBUNTS
- Qualify existing prospects
- Identify new major gift prospects
- Annual appeal – re-cast/re-message/new mediums

Your Capital Campaign

You are either:

- Considering
- Conducting
- Redeeming pledges – stewardship

Action depends on the stage:

- Stay the course – use time for relationship-building
- Study may or may not be delayed
- Silent phase may be extended
- Timing of public phase announcement
- Reprioritize case elements, as appropriate

Why continue?

- Your mission is relevant
- Your institution's philanthropic needs have grown

95/5 Principle – Spend Time with Impact Prospects

- Review major gift prospects/donors and segment for personal outreach
 - Calls – revolving list of names from your chief development officer – 1 or 2 calls/day
 - Quality conversation - 3 points:
 - Ask them how they're doing
 - Express gratitude – “You’ve always been there for us”
 - Transition to other topics (e.g. the school)
 - Make it personal
 - Their response matters for next steps
 - » Appropriate follow-up – style and content
 - Debrief with staff and others who are conducting outreach
 - Don’t be surprised if they ask, “Can I help?”

Outreach to Others

➤ *Message, Tone, Method will Vary*



Board members

Insiders
Frequent communication
Solicitation, *if appropriate*



Key volunteers and other supporters

Let them know they are important to you



Campaign Cabinet

Send e-mail apprising them of strategy
Check-in with a call
Some may be part of stewardship calls or hand notes

Other Operational Methods - 1



Mission and faith-focused



Institutional financial shift (e.g. student enrollment, scholarships) informs appeal



Scrub database

Conduct detailed prospect research

What new or increased donors will emerge?



Virtual or postponed special events

Other Operational Methods - 2

Monthly giving program –
difficult to “opt out”

- Sustaining support
- Younger generations

Planned Gifts

- Endowment impact
- Key component of a comprehensive development program

Do something NOW that
was scheduled for later

- Drafts of materials or publications

Review 120+ days out to
adjust plan

- Donor retention
- Counter vulnerable activities

Recommendations from Giving USA Foundation & The Lilly Family School of Philanthropy



Monitor new developments:

Short-term vs. longer-term impact



Nonprofit leaders and fundraisers:

Understand and respond to change
How do they affect your institution's giving?



Recovery and success will depend upon:

How institutions manage themselves
Strong leadership and confident implementation of new strategies and methods

Q & A

Thank You!

RUOTOLO ASSOCIATES INC.

Corporate Headquarters:

580 Sylvan Avenue, Suite M-B
Englewood Cliffs, NJ 07632

Tel: 201-568-3898 **Fax:** 201-568-8783

George C. Ruotolo, Jr., CFRE, Chair and CEO – gruotolo@ruotoloassoc.com – 201-715-8944 (cell)

Theresa A. Shubeck, Executive Vice President – tshubeck@ruotoloassoc.com – 201-665-4572 (cell)

www.ruotoloassociates.com



MEMBER

THE
Giving
Institute

Shared intelligence.
For the greater good.