617-268-4960 rita@rita1st.com

Professional Experience

Charitable and Philanthropic Management Counsel

2015 – Present: President 1997-2012: President

Serving growing organizations; building affiliates of national organizations; and establishing fundraising programs.

- Creating and implementing full-range development programs. One resulted in Accelerated Cure Project for Multiple Sclerosis receiving its first \$1,000,000 gift.
- Revitalizing existing development programs.
- Establishing planned giving programs. Currently leading first endowment campaign for 100-year-old international organization of professional women who work with the United Nations on human rights issues.
- Providing management, organizational development, and fundraising counsel for charitable organizations with operating budgets of \$1,000,000 to \$50,000,000.
- Establishing organizational goals and developing strategic business plans.
- Leading development of mission and vision statements.
- Directing campaigns with goals of \$1,000,000 to \$10,000,000.

National Parents Organization, Inc.

2012-2015: National Executive Director

It is the only national organization advocating for shared parented and gender equality in family law.

- Led development of strategic plan with selected national and state volunteers that set the stage to change the organization's name; develop allies; expand media presence; and build volunteer driven affiliates.
- Developed lobbying plan, appropriate structures, and materials to build affiliates in every state.
- Expanded our work from Massachusetts to 20 affiliated states. Recruited 300 volunteers and created training program.
- Cultivated and solicited lead contributors. Made 2013 the highest revenue-producing year on record.
- Created Law Firm Network to recruit volunteer services and seek paid listings.
- Brought accounting records and reports to government agencies into compliance and up to industry standards.
- Cultivated and recruited two new members for the Board of Directors; the first additions in six years.
- Created new name, logo, tag line, brand image, and e-newsletter with a volunteer team.
- Built new website to showcase our affiliates and our national mission, vision, and core principles.
- Created virtual office environment.
- Wrote website and e-newsletter copy and all fundraising materials.
- Developed a "grade" for every state on shared parenting, based on states' statutes to use as marketing tool.
- Developed research and the case to make 2015 the year of Shared Parenting in Temporary Custody Orders. Ready to introduce in our affiliated states.

American Councils for International Education, Washington, DC 1996-1997: Director of Development

- Restructured legal organization and created Board of Trustees.
- Solicited international businesses and foundations.

The Bill Heim Company, Granville, Ohio

1981-1996: President (1994-1996); Vice President (1981-1994)

- Designed and directed contribution campaigns for operating, endowment, deferred/planned giving, and building funds.
- Conducted campaigns for goals of \$1,000,000 to \$450,000,000, often exceeding goals by as much as 30%.
- Counseled boards of trustees and senior staff on management and development, especially in their fundraising roles, for organizations with operating budgets of \$10,000 to \$1,500,000,000.
- Began new charitable and philanthropic organizations, such as AAU Foundation.
- Developed Company's feasibility study into a market research study
- Prepared public relations and marketing plans, including writing solicitation and other marketing materials.

Marketing Services, Columbus, Ohio 1976 to 1981: Independent Consultant

- Planned, budgeted, and administered the advertising, marketing, and public relations programs for retail clients.
- Managed and conducted marketing and media studies for industrial, consumer, and utility clients.

Volunteer Leadership

- Organized the South Boston Arts and Cultural Center volunteers to incorporate, raise contributions, and respond to Boston's RFP for the District 6 Police Station.
- Organized the team that led the effort to introduce a charitable contribution deduction in Massachusetts. It was signed into law in 2000. The legislature overturned it in 2002.
- Past Member, Attorney General's Advisory Committee on Public Charities, Commonwealth of Massachusetts.
- Past Chair, Government Relations Committee, Association of Fundraising Professionals, Massachusetts Chapter.
- Past Director, Association of Fundraising Professionals, Massachusetts
- Past Member of Government Affairs, International Relations, and Membership Committees of American Association of Fund Raising Counsel, Inc.
- Former Trustee, Ohio 4-H Foundation.
- Former Trustee; Big Sister, Big Brothers/Big Sisters of Licking County.
- Founding Member and Past President and Trustee, Hills of Ohio Chapter, Association of Fundraising Professionals.
- Honored by Hills of Ohio Chapter with initiation of Fuerst Award for Outstanding Community Leader, 1996.

Presentations

- Taught Entrepreneurship for Nonprofits for the masters in Organizational Leadership at Wheelock College.
- Presented workshops on planned giving for the Alliance of Resident Theatres/New York.
- Taught at the Management and Community Development Institute at Tufts University.
- Represented the Lincoln Filene Center, Tufts University, at international meeting of CIVICUS held in the Philippines.
- Spoke at the invitation-only, National Center on Nonprofit Enterprise inaugural event.

Publications

- Editor and Author, What Fundraisers Need to Know About State and Federal Regulation: How It Can Influence All Aspects of Their Work, published by the Center on Philanthropy and Jossey-Bass, 1996.
- Author, *Speaking With Your Contributors About Planned Giving*, *Wednesday Report*, published by massnonprofit.org, INFORM, SHARE, THRIVE, July 14, 2010.
- Author, Why You Should Plan Your Giving, published by The Three Tomatoes, June 4, 2010.
- Author, Why Nonprofits Should Start a Planned Giving Program Now, Wednesday Report, published by massnonprofit.org, INFORM, SHARE, THRIVE, May 27, 2010.
- Author, *After SOX. The implications of the Sarbanes-Oxley Act for institutions and affiliated foundations, CURRENTS*, published by the Council for Advancement and Support of Education, March 2004.
- Author, Advocating for Our Contributors, Journal of the DMA Nonprofit Federation, published by the Direct Marketing Association, November 2000.
- Author, A Reason to Give: Massachusetts Considers a State Tax Deduction for Charitable Gifts, CONNECTION, published by the New England Board of Higher Education, Spring 2000.
- Author, Mastering the Maze: A Guide to the Labyrinth of Laws that Regulate Campus Fund Raisers, CURRENTS, published by the Council for Advancement and Support of Education, October 1998.
- Author, Dilemma of Contingent Gifts, Exempt Organization Tax Review, January 1997.
- Co-author, Endowment Giving for Parishes of the Episcopal Church and Prospect Research and Management System: A Market Research and Management Program for Nonprofit Organizations.
- Author, States Step Up Oversight, Foundation Focus, Volume I, Number 3, Fall 1995.

Professional Affiliations

- Commission to create White House Council on Boys and Men, member
- International Council on Shared Parenting, founding member
- Massachusetts Nonprofit Network, member

Education

- Ohio University, Athens, Ohio: Bachelor of Science in Journalism, 1976.
- Capital University, Columbus, Ohio: Master of Business Administration, 1983.