



To: RoadMap members, funders and other colleagues
Fr: Emily Goldfarb, Michelle Foy
Re: Making referrals to RoadMap
Da: January 28, 2015

Colleagues, funders, and social justice organizations frequently ask us about the criteria we use to determine if a grantee or organization is a good fit for capacity building support from RoadMap. Below are the general guidelines that we follow in order to determine whether an organization or alliance is a fit for RoadMap as well as a list of the services that we provide.

- **Type of organization or alliance.** RoadMap consultants bring years of expertise, perspective and skills specific to serving the needs of social justice, grassroots, community-based social, economic and environmental justice organizations, alliances and leaders. Many of the social justice organizations we work with also have a social service strategy, integrated and connected to organizing and advocacy, as well as an electoral/civic engagement component. We prioritize work with these organizations and alliances as opposed to other non-profits based in other areas of work, issues or sectors.
- **Size of organization and/or budget for capacity building support.** RoadMap typically provides support to organizations that have a **minimum of \$15,000 available for capacity building work**. Anything under this amount generally does not make sense for RoadMap, given the time and costs required to provide assessment and quality back up to all of our engagements. More importantly, this minimum allows us to prioritize work that contributes to more lasting transformational change through in-depth support over a more extended period of time (12-18 months). This is the role where we can be most effective, and also often utilizes an integrated team approach. **A more realistic budget range for this kind of work is \$25,000-\$75,000.**

There are some exceptions to this minimum, including former clients, which we will determine on a case-by-case basis. If an organization's needs and budget do not fit RoadMap's criteria, we refer them directly to consultants (inside and outside of our network), other intermediaries, or send them to our website where they can view the [bios and contact information](#) for all 65+ RoadMap consultants, in order to contact consultants directly.

- **Organizational readiness.** In our initial intake with groups that are interested in working with RoadMap, we consider organizational readiness, and whether the timing is right for an organization and its staff to realistically commit to and follow through on a significant capacity building project. Our approach will usually include conducting an assessment before developing a proposed scope of services. This process enables us to determine organizational readiness, to create alignment with our clients and to develop shared evaluation measures by which to assess successful completion of the work and client satisfaction.

If you or someone you know would like to set up an initial request for services conversation please e-mail michelle@roadmapconsulting.org or [go to the RoadMap website](#), in order to schedule a 30-45 minute phone call.

RoadMap Services Include:

- Organizational Assessment
- Strategic Planning and Program Development
- Coaching for Executive Directors and Secondary Leaders
- Financial Assessment and Planning/Financial Literacy Training for Staff
- Fundraising and Capital Campaign Development
- Leadership Transition Planning
- Programmatic and Organizational Evaluation
- Board Development and Governance
- Team Building and Leadership Development
- Support for 501(c)(3) and (c)(4) Organizational Structures
- Strategic Communications
- Human Resources
- Crisis Preparedness and Response