



The Nonprofit Toolkit: Communication and Cultivation

At Rodman & Associates we have worked with, and served, many deserving and visionary nonprofit organizations. While representing varied sectors—the arts, health and human services, education and the environment—we find they have in common a passionate belief in the need for their work, a deep understanding of their organization’s purpose and a team of staff and volunteers working tirelessly for the cause.

Often, they also have in common a restricted budget, inadequate staffing and a lack of effective communication tools to draw support to their mission. To meet this need, and based on prior client experience, Rodman & Associates has developed a **Nonprofit Toolkit for Communication and Cultivation**. It includes materials that can be easily updated, printed in house and used for multiple purposes including donor cultivation, grant requests, annual or seasonal appeals, press communications as well as content for newsletters, brochures and web sites. The Toolkit can be customized to the needs of the client, but will typically serve two main functions:

- Tools for Communications and Grant Applications
- Tools for Individual and Small Group Solicitations

At the heart of our process is making **The Case for Support**. This is a well-researched document that lays out critical elements of the organization history, purpose and structure, aligned to the information needed for effective public communications, successful donor solicitations and grant applications. To prepare, we first engage in discussions and surveys with stakeholders and review all communications materials that are, or have been, used by the nonprofit. This review, combined with a knowledge of funder priorities is the basis of **The Case for Support** and using this tool as a foundation, we will develop a portfolio of deliverables to be used for individual or small group cultivation, direct solicitations and donor retention. Finally, we will develop a recommended annual calendar of activities aligned with the organization’s capacity.

Upon request, Rodman & Associates will provide a proposal to the prospective nonprofit client that includes an itemized list of deliverables and a calendar timeline with pricing for each phase of work. Note that we will begin the process by having conversations with staff and leadership and completing a deep study of the organization. This initial investigative phase will inform the content for all elements of the Toolkit.

About Rodman & Associates

Rodman & Associates are seasoned professional philanthropic advisors dedicated to helping clients, large and small, engage in effective philanthropy. We are committed to the development and support of philanthropic leadership through our work with organizations, financial advisors and community philanthropists.

Rodman & Associates professionalize the process through in-depth interviews, thorough research and investigation, wise counsel and careful assessments. We customize every element of our work to the needs of our clients. To learn more, visit RodmanAssociates.com.

About Joy H. Selak, PhD, CAP®

Joy Selak joined Rodman & Associates in 2017 to assist organizations, advisors and donors in identifying philanthropic priorities, assessing community needs and establishing giving structures for greatest benefit and effect. She is certified as a Chartered Advisor in Philanthropy® (CAP), by the American College of Financial Services, joining a network of top planners working to make philanthropy more effective and dynamic for generations to come. The robust, graduate level curriculum is designed to build expertise in areas including board and non-profit effectiveness, strategic fundraising and legacy giving.

Joy brings to Rodman & Associates more than 20 years in nonprofit leadership at organizations including Austin's ZACH Theatre, MINDPOP and A Legacy of Giving. Nationally, she served on the board of the Interstitial Cystitis Association in Washington, DC and was a founder of the San Juan Island Community Foundation in Washington State. Selak was board president of ZACH Theatre during construction of the Topfer Theatre, and chair of the organization's 5-year strategic planning effort. In over 13 years on the ZACH board, she has served as chair of the Education, Membership and Executive Committees and led task force groups to develop a vision for ZACH's education programs and create a board policy manual. In 3 years as MINDPOP's Director of Development, she doubled contributed income and raised nearly \$850,000 in grant awards.

Joy earned a Ph.D. in Language Arts Curriculum and Instruction at Arizona State University. In addition to teaching in the English Department, Joy consulted with schools and districts statewide in the design and adoption of developmental learning plans. In 1980, Joy became an Investment Advisor and was named Vice President of investments at Morgan Stanley-Smith Barney. During her 14-year career she, with her husband, managed over \$100 million in client assets and opened an office for the firm on San Juan Island in the Pacific Northwest.