**Volunteer Your Skills to Great Causes**

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**SPEAKERS**

Kimberly Swartz

**Kimberly Swartz**

Hi everyone. I'm going to go ahead and kick off our event officially, I know we've already got some great conversations and introductions flowing in the chat box. And that definitely should not stop. So let's keep that going. But I want to take this opportunity to welcome everyone. If you are here for the taproot webinar, volunteer your skills to great causes, you are in the right place. We're so excited to have you join us today, during pro bono week. In case you're new to taproot, or you just haven't heard us talk about pro bono week before. It's an annual celebration of the impact of pro bono, the impact of this really impactful form of, of community service on communities and societies across the globe. So I'm really excited to share information about our nonprofit profits, and information about pro bono consulting and giving back in this way, so you can start to get involved or continue your involvement during this special week of service.

So I know this is a busy time for everyone, we're going to try and keep this event to an hour. So we can get you out of here on time. And we just want to say how much we appreciate you hopping on sharing your time sharing your brain space with us today. Because I know we all have a lot going on. And so really appreciate everyone here who's ready to step up and help communities rebuild, recover, strengthen and become more kind. So it's all your time and attention is really appreciated. All right. So I'm going to get us going by sharing a little bit more about taproot and the agenda that we're going to be covering today. And so, as I introduce myself in the organization, I'd love for you to continue introducing yourself. So use that chat box, tell us where you're joining from the organization that you're with. And feel free to include your LinkedIn profile information as well. So my name is Kimberly Swartz pronouns are she her hers. I'm located in Charlotte, North Carolina. So let me know if there's anyone else in the area who's who's joined us today. I am taproots, director of community engagement, which really just means that I hit up efforts on the taproot Plus program side, to engage you all in service with our nonprofit partners. And make sure that that engagement, that connection that you're making is a really successful and enriching one for both parties.

I'm also joined by my taproot colleague, Megan Gillette, who is a program associate at taproot plus, and she's going to be covering the chatbox throughout today's presentation. So attendees will be muted. But please don't let that stop you from asking questions, making comments using that chat box. Megan might handle some of those questions throughout. But will she will also direct some to me during our q&a portion at the end of the webinar.

So a little bit more about what we do here at taproot, the Taproot Foundation, we're actually a nonprofit ourselves. We're a nonprofit that serves our fellow nonprofits. And we do that by leading mobilizing engaging professionals in pro bono service. So since the early 2000s, when our nonprofit was formed, we've partnered with over 8000, social change organizations and over 25,000 volunteers, totaling around 260 million and donate it professional services. So in addition to our own pro bono programs, and the consultancy work we do with companies to help them build out their own employee volunteerism programs. We also lead a global NGO network and are really committed to advancing this movement, this movement of service and impact through further research, education and events.

So during today's event, specifically, we're going to be covering why your skills matter to the social sector, especially now in this moment, we're going to be having a conversation with an experienced taproot volunteer, although shell tips, pro bono consulting, so everyone can leave a virtual hello to Jim, who you might see on your screen right now. We're going to be hearing from Jim in just a few moments. He's one of our really talented committed taproot plus volunteers and has a lot of advice to share with all of you. Then I'm going to share a quick step by step guide to how you You can sign up and actually start participating in taproots programs. And then of course, at the end of the event, we will save time, a healthy amount of time to do some q&a. All right, so with all of that said, I'm going to go ahead and dive right in to the heart of our content. So, as some of you might be aware, this year, as is, as in the previous two years, nonprofits have really had to operate more leanly than ever before. They're meeting rising community needs, while dealing with decreased access to hands on volunteer support, cancelled fundraising events, having to switch their programs to virtual and having to invest in that infrastructure and technology that they might not have had the budget for previously. taproot conducted us a widespread survey of our nonprofit partners at the end of 2020. And we found that 63% of respondents were still reporting a decrease in funding, specifically due to the COVID 19 pandemic, meaning that these really small and scrappy nonprofit organizations are still making do with even smaller budgets and less bandwidth than they were previously.

And it goes without saying what a vital role social good organizations play in keeping our communities safe, strong, healthy and kind. Nonprofits are being looked to more and more for vital services. But at the same time, their traditional funding and volunteer sources have shifted quite dramatically. And so it's even more reason that your virtual pro bono support is going to be all the more vital in the months and, and year ahead. And so really, to put it super plain lame, most organizations tackling social problems across our communities. I know we have folks on the east coast, the West Coast, we have folks from Canada, the US maybe a few other countries, I haven't even noticed in the chat yet. But organizations tackling these issues across all of our disparate communities, they don't have the full access to the resources, funding or staff expertise needed to fully accomplish those vital missions. And that lack of ability to invest in their internal operation. it saps their ability to help us all create and develop and maintain strong, resilient and sustainable organizations and communities that those organizations are serving. And due to current global crises, these charitable organizations are feeling this capacity gap this resource gap more strongly than ever. And that's really where you come in.

So Taproot Foundation bridges the nonprofit resource gap through connections with skilled volunteers, like you all, who provide your tech marketing, HR strategy, operations data, or finance experience pro bono. So I know I've found myself using the phrase pro bono already a few times in today's presentation. So I do just want to take a moment to take a step back and pause because often when people hear the phrase turn pro bono, their minds immediately go to the legal space. And that's totally natural. But it really is so much more than that. So when we talk about pro bono service, we're actually talking about donated professional services benefiting organizations working to improve society in some way. And so taproots programs specifically focus on the areas of marketing, advertising, communications, HR, leadership, development, tech, it finance data operations and strategy. So if your skills or your experience falls under those categories, you're absolutely in the right place. Pro bono does not just mean giving back through donated legal services.

**Kimberly Swartz** 15:43:55

So let's talk more about the actual value of business pro bono. So in 2019, taproot and CCP, we updated the findings around the actual financial impact of an hour of pro bono volunteering in key areas like PR, legal, financial services, design, etc. And through this study, we determined that the average value of an hour of pro bono is worth $195. And so we're happy to share a link to that study if folks are interested in digging in more. But as you can see here, that's that's quite a big difference between a typical hour of traditional volunteering, going to a soup kitchen and going to a house build site and picking up a hammer. Those tasks are also incredibly important hands on volunteering, financial donations, and pro bono service. They all play really key roles in strengthening a nonprofit and helping it achieve its mission. But at the end of the day, when you look at the value of what you're donating, with that hour of your time, you do have an opportunity by doing pro bono consulting, to really get a high return on investment with the donations you're able to make to causes that you care about.

So I can share a personal example, I do not have 1000s of dollars available in my home budget or in my family's budget, to donate to causes that I'm really passionate about. However, by doing a pro bono project, maybe donating 15 to 30 hours of my time, that equates to 1000s of dollars in value that I am donating to nonprofit organizations that I really care about, I wouldn't be able to make that financial gift. But I can make that in kind a service gift instead. So it allows me to feel really connected to community causes that I care about, while also not completely breaking my family's budget. So like I said, hands on volunteering, donations pro bono service are all really key. And one form of engagement should not fully replace another. But pro bono service offers a really great option for professionals who might not have 1000s of dollars to donate to still make a massive difference in their community just by using the things that you're already great at. So on that note, there's also a ton of other benefits that come by giving back in this way. And so I just want to talk about a few of them. Now. You know, one of them and the top one really is to make a substantial impact on causes near and dear to your heart while learning about challenges impacting communities around the globe. Right above all, above all the other great benefits to you as a person from entering into these really impactful relationships. At the end of the day, it is all about you helping this organization that is helping community members. And so really wanted to make that clear and and have it at the top of the list. But also pro bono is a great way to build out your professional network. If you're in the process of making a career change. Maybe you're interviewing for additional positions, maybe you're just trying to build a network in a new community, if you recently moved, whatever the reason, doing pro bono is a great way to build more network connections. It's also a great way to flex existing talents, existing expert expertise in new environments, right experiential learning is a huge thing. And definitely something that folks look for. It gives you a great opportunity to developed, quote, unquote soft skills don't necessarily agree that they should be labeled soft in any way. But things like empathy, or leadership, and collaboration, all of those things are items that hiring managers, and folks at your own internal company are really going to be looking for key examples of how you've demonstrated this. And pro bono is a great example to point to.

And then finally, it's of course, a great way to strengthen your resume and build out your portfolio with really tactical examples of experience, and how connected you are to the community. Right. And so my colleague, Megan is actually going to drop a link to a blog in the chat, I believe at the moment, which kind of has a guide to including volunteering, including pro bono consulting on your resume, which has a lot of other helpful tips and ideas in there as well. But really, to put it simply, pro bono can demonstrate your ability to collaborate with others. I can really showcase how you're able to manage projects outside of your professional role and demonstrate your core values as a person what you care about outside of work. And then want to quickly touch on the types of causes you can work with because I think I've seen a few chats I'm just scrolling through the chat box here from Folks, feel free to call out if there's a social issue you're particularly passionate about and, and wondering if there's opportunities to give back to I'd love to hear that from folks. taproot works with a huge range of nonprofits.

And like we spoke about, just now, at the end of the day, the biggest benefit of pro bono is the support that you're able to offer the nonprofits, you're assisting a great mission, you get to know that your work matters, your time, your experience, it matters. And that in turn, supports community members. And so when you give back through taproot, you have the opportunity to support organizations working in civil rights, legal services, is housing and homelessness, environmental causes, and many more, which means that you can really align your professional talents with a cause area that you're uniquely passionate about. And I'm seeing a lot of folks calling out skills that they're really great at, oh my goodness, web design, PR, HR policies, newsletters, copywriting, program designs, risk analysis, program evaluation, all of these are huge areas of nonprofit need. And so you're absolutely in the right place. You have incredibly valuable skills to share. And I just saw a chat from someone who's retired. Yes, you are absolutely welcome. Here we have a huge contingent of retired professionals involved in our programs.

And, you know, just going back to this benefits of pro bono volunteerism slide, something that I've heard a lot from the retirees who engage in our programs, is that I'm doing pro bono consulting, giving back to nonprofits in this way is a great way to keep their skills sharp. They spent decades being experts in these areas. And now they might not get the chance to use those those same professional skills every day. And so working with nonprofits volunteering in this way, is is a way for them to funnel those skills and make sure that they're not getting too rusty from disuse. So yes, retirees absolutely welcomed and appreciated. But just going back quickly, to our slides here, as I hope you can see from the quote on this slide from an Holcomb, of the nonprofit unity parenting, parenting and counseling, your efforts as a volunteer really pay off for the nonprofits at the end of the day. A nonprofits bottom line is their mission. And you can help them get there when your skills are paired with the right nonprofit need.

So, with that in mind, I do want to switch gears a little bit because I want to make sure we have plenty of time to benefit from our conversation with one of our really experienced, talented pro bono consultants, Jim Johnson. So Jim, if you're able to jump on camera. And as you do that, just a quick intro, Jim is a longtime taproot volunteer and really a leader within our pro bono consultant community. He's been a strategy leader for decades. And he's lent his skills to nonprofits through dozens of consultation calls and longer term projects. And so Jim, I think I heard you jump on. So I'm going to take that as a sign we're ready to kick things off.

15:53:29

Okay, can you hear me? All right? Yes,

**Kimberly Swartz** 15:53:31

I can hear you. But let's get a quick confirmation in the chat if we can, if you're able to hear Jim and I, that would be great. So Jim, I would love for you to introduce yourself to the audience we have with us. And maybe tell us a little bit about how you first became involved with pro bono consulting, what what pulled you into this space?

15:53:57

Well, thanks very much for the introduction. I appreciate that. So I I've been my career is about 50 years long. And I don't expect it to end really soon. So I'm still going ahead. And what happened with me is my spouse and I and developed a methodology back in the 80s and 90s, for running group meetings. And over the last many years, we've converted it into a piece of software. So it's my life's work to make that methodology is broadly available as possible. And part of that is getting it out into use. So we did probably 100 engagements using flip charts. And I needed to Don't go out and use it in, use it as a software tool to demonstrate that it will produce the same type of value. So I assumed all along that it would work in a pro bono space. And I was very fortunate to find taproot as an opportunity to do that in a way that's amazingly straightforward. And so using the taproot platform, I'm able to very easily find people that have the type of need that I can provide service to, and connect with them and start a relationship and then go ahead and provide the engagement.

So I've done approximately 30, I can't, I've lost count, I've done 30 engagements over the last three years, over half of them would tap root. And so it's really, it's incredibly rewarding. So some of the specific benefits that I was hoping for and received is that it was practice. It was practice in exercising my consulting and sales skills. There's a certain amount of selling and certain amount of having that conversation with the nonprofit and saying, Are we a good fit? Can I help you out? What are your needs, so there's a there's a relationship development phase, I had been geeking out writing code for eight years and could barely speak English. So it was really important for me to get my sales hat back on and learn how to talk to people again, and talk about the value that I was offering, which is a standard thing for anybody offering any kind of consulting services at all. So doing this pro bono course, you know, it's all it's free, what's the big problem, you still have to talk people into, into having that relationship, and you want to have a relationship building opportunities, the other opportunity for me was to re re develop my consulting skills, which I had not done much of for good while and particularly using my product. So those were tremendous boost to my ability to move forward in my, in my personal professional strategy. I don't know how I could have done it otherwise. So I can add about that last night, it was like, we just don't know how we could have done it without having done this pro bono work. So at this point, I have a huge amount of confidence. I have started professionally selling, which took me a long time to get geared up for it, but I really could not have done it if I had not had the confidence in my own ability to deliver and in the confidence in talking to people and talking about my what I can help them with, and learning their, what their needs are.

So yeah, it's been a real boost. I'm gonna see if I wrote some other notes here. The other thing about it, I was pretty clear I wanted was to get testimonials. And that's been mentioned. And it's, it's really important that you're able to be able to put things on your website and get people to say, Hey, I worked with Bob, or Fred or Jane and they were good. And they helped me out in this way. And so I have collected, I've got a dozen testimonials on my website that I'm very proud of, and I feel very good about. Of course, the do good aspect of it is I can't describe it. It's like, I gotta be careful here. I was working with a nonprofit earlier last week, and I had, I was in tears. Because when you're at the point of understanding the not their work, but the people that they are trying to help, right. And the small nonprofits at the ground, root neighborhood level, are reaching out to people that you know, I've had a privilege life, it's to be able to see into the level of need of these community organizations and the services they're providing is really heart rending at some level, but it's the greatest feeling in the world, to know that you're able to help them. And so I it's a crazy thing. It's painful in one way, but at the same time, it really opens your heart to be able to to see that you're providing that value and to be able to say to yourself, Wow, I did some good I affected the lives of you know, 100 people, or more. And there's I don't to me, there's nothing that compares to that. So that's kind of what it's been like for me and what what pulls me forward. And it has changed my outlook so much that I am now basically going to be marketing and working exclusively with nonprofits. It's not to say that I won't go back to doing commercial work for people, you know that they're in profit companies. But I just want to work with nonprofits, I want to do good. I think it's a great market for me for my services. So just a little bit about what I do is I do I've focused on. So I've got this tool. And this methodology, it can still be done in flip charts, basically models business process. I put some I put my website in there and there's a set of examples in there too in the chat. But there's also the thing about the business model is it can be used in a lot of different ways. And so I been addressing clients on tap root that say I need business planning. So my point of view is like you need to have a business plan. But you need to start with where you are now, most nonprofits are doing incremental strategic growth, they're not going out to acquire a subsidiary or have some kind of radical change. Yeah, and actually,

**Kimberly Swartz** 16:00:02

I want to jump in there for a second, because I think this is a good context moment for folks on the line, many of the nonprofits that you're going to meet through taproot plants are going to be very small organizations, we're talking about a lot of startups, a lot of organizations that are completely volunteer led. So it's people who found founded this organization, because they saw a need for it, and there wasn't anyone else working on it. So they are now doing this off the side of their desk. And they're also working a nine to five job otherwise. And so that's a really important piece to keep in mind. as you think about transferring your skills from a corporate space where there may be a lot of resources present, and a lot of structure present to these really young or startup s or small organizations where the infrastructure just doesn't exist yet at all. So with that said, back to you, Jim,that's a very good point. That's exactly been my experience, I've been working with a lot of people that are basically solopreneurs in the nonprofit space, they're basically, I mean, I've worked with three organizations over the last week, that basically, it's a single person with maybe one or two volunteers, and they're helping children in need out of their own pockets. And what they need is structure.

So I'm providing that structure. But let me speak to all the other folks that are offering other skill sets, they need everything. When they when you look at an organization, that's one person trying to be helpful to help, you know, 100 100 people, they need a website, you know, they need marketing messages, they need their program reviewed. And I'm doing program review, in a sense, because the modeling, however, it doesn't matter how you come at it, they just need a lot of structure, they need a lot of support, everything you do for them amplifies their ability very quickly. So it's it's one of those things where you may enter into the relationship to provide a specific service and find yourself saying, Well, gee, you know, I've got a whole bunch of business expertise. These people just need to know some business advice. And just you're in a, you're in an informal mentoring relationship and able to support them, and help them think about what their next steps are, and help to think about, you know, well, gee, you asked me for some web design support. It sounds like you really need to get some support over here and your funding, why don't you do another project, we'll tap root and ask for somebody who can give us his funding support. So you're able to be a source of value to that organization in many different ways beyond your initial approach. And I don't, I have not developed too many long term relationships with these folks. Because the way I do the work, I drink, create the models and they're done. They move on. However, there's an opportunity to stay in touch with them. And it's always getting the testimonials and having them thank you for it is like really? What do you compare that to in life? It's the greatest thing.

**Kimberly Swartz** 16:02:58

Yeah, I think it's important to just underline highlight, exclamation point, this idea of referrals and references and testimonials. It's a huge, huge value add to your own career path, whether you're an entrepreneurial spirit like Jim, and you're starting up a new business or expanding a business or you're you're just potentially looking for a new job or going down a new career path. I also want to touch on something you mentioned before, which was around, it allowed you to brush up on your consulting skills, because that's not something that you just because of how you've moved through your career that there had been a bit of a gap for you in terms of sales in terms of consulting. And I think we have a fair bit of folks on the line who maybe have never worked with a nonprofit before, or maybe at their current roles don't work in a consultant capacity. And so I'd be curious to hear from your end gym, lessons learned or maybe any tips you have for people who are new to consulting with nonprofits. Is there anything that will help set them up for success as they enter into that?

16:04:12

Well, I think that I think that a lot of it has to do with listening and being open minded. Because I, I've made a post in here because as I said, there's so many stakeholders, a nonprofit is in the middle of the space, and they're surrounded by stakeholders. They've got volunteers, they got donors, they have their onboard staff. They've got you know, they need they've got partners that they work with. They have all these interfaces and and going in with a mindset of kind of understanding them as their little business operations or their organizational business operations. And having an open mind about where can you help, because that sense of wanting to be helpful to them in a broader sense, is what makes you a good consultant. It's, they definitely want help with something like you know, a website, or they want help with a marketing message, or they went up with a funding plan. And to the extent that they want your expertise for that, that's great. They also want people that are able to talk to them, I mean, just be friendly, and, and also talk about what their needs are. So listening and getting them to talk about their stuff is like the number one skill you can have in any kind of consulting relationship.

Otherwise, I think it's really a matter of going at the value getting to the point about what value you're going to deliver and how you're going to do it and, and making it clear to them that you have a plan that you're professionally competent, and that you want to help them between being friendly and open and listening a lot. And then you know, going right after their value, that's what makes them want to work with you. So I think there's two best things I could come up with there.

**Kimberly Swartz** 16:05:56

Yeah, push them to be very clear about the outcome they're looking for at the end of our partnership together. How will I know that I've been successful in my work with you? That's absolutely something you should feel comfortable pushing the nonprofit for.

16:06:11

Yes. And I think that you should also be always working against a written plan. It's as much as it's just because your nonprofit doesn't mean they're nonprofit. Yes, they are. They are process oriented. They need to be process oriented. They they need plans. The solopreneur entrepreneur, solopreneur nonprofit person, the single person running the organization, is typically doing out of their heads, they really value plants, to the extent that you can write them a written plan is a big help to them. It saves them having to remember that stuff, it keeps you on track, and helps you make sure the project is a success. So always start off with it always start off with a plan. I have a an agreement that I don't always ask him to sign but I ask them to acknowledge that we've got an agreement, and it's kind of a little contract. I think that's something to consider. But I think that you need to have at least an exchange of email that describes this is what we're intending to do. Here's our timeframe. And of course, it's flexible. It's really important, though, to get that expectation. They're busy people, they they're distracted. They've got their own personal lives, they're running a complex little operation. And so you're giving them a great assistance by helping them be structured. And having a plan is a great way to start that out.

**Kimberly Swartz** 16:07:31

Yeah, I totally agree. And if you choose to volunteer through tapper, and I say that very intentionally, because this event is really meant to set you up to go and do pro bono consulting. We would love if you found opportunities to work with taproot, nonprofit partners. But these tips that Jim is sharing that we shared earlier in the presentation and will continue to this should support you doing pro bono anywhere, right? We want to just build this ethic build your ability to do this successfully, no matter where you're finding opportunities. And so starting with a scoping worksheet, starting with an agreement of what's going to be completed milestones that you're going to look to complete things by its complete, completely acceptable, and encouraged for you to work with the nonprofit and push them to get structured in this way. And they'll probably appreciate you project managing and assisting them with that structure. So don't be scared to ask for it. taproot provides a scoping worksheet in your account once you're matched on a project with a nonprofit. And of course, our staff members are always here to assist with that process as well. All right, so I'm just keeping my eye on the clock. I want to make sure that we have a chance to talk through how to actually engage in taproot programs. So I think, Jim, I'll do one last question. And then I'll ask you to stick around for q&a. Because it looks like we've got some good questions from audience members that will loop back to at the end. So my last question for you at this time, is, is there anything that you've particularly like learned or really gained from working with nonprofits in this way, going back to this idea of benefits of doing this type of service?

16:09:29

I think the thing I learned, I think I learned and this is sort of a general it's an addition to my work that I've done before is to see a whole organization and to see what I call the energy or the pole. So a nonprofit organization is basically, they're basically, they need donations, they're working on the basis of donations, and volunteer time. And so what attracts the volunteer, what attracts the donation is basically the opportunity to do good. So the donor is basically saying, I will give you some money, and you can do good. And so, but there's always like, well, what is how does it actually work? You know, so you've got one person in a downtown, you know, poor neighborhood downtown. And they're basically saying, I've got this network of kids that are need help after school, I'm helping them on a one off basis. What's the poll? Why should that person be given money, because if we can give that person a little bit of help, they're going to be able to help more kids. And so there's a there's a poll of, of how things work in an organization, it's like, maybe they're taking advantage of a great candidates available in the city, maybe there's a state regulation that supports their work, understanding that, to me has been a real boost. I think the other thing is that to understand if you live in a province community, everything's taken care of, you know, the schools work, there's after school programs, you go down to the store, it's safe. You can spend money got stuff to me, if you're in a if you're in a marginalized community, the communities that are being served by these nonprofits, you can't take anything for granted.

**Kimberly Swartz** 16:11:07

Infrastructure doesn't exist, the safety nets don't exist, except for what the nonprofit is providing these little nonprofits, network like crazy with each other there, they're in touch with all the community organizations, they're in touch with the cities, they're in touch with the grant providers, or they're not in the sense that to the extent that they network together, starts to perform, create more and more value. So seeing that, to me was a real eye opener, because, you know, if you if you got money to operate, you operate independently, if you don't have money, you really depend on the social network to help you out. And so by contributing these nonprofits, we are firming up that social network and supporting all those people that just don't have that kind of security in the world. And it's a it's like, while they need it.

**Kimberly Swartz** 16:11:59

It's taking an active role in this redistribution of resources across communities, redistribution of wealth, and, and power and experience. And a really kind of coalition building kind of way

16:12:14

is this a collaborative does it that there's a valued network of people, hearing about opportunities and understanding where sources or resources are available, and knitting that together. And you cannot do that if you're a city offering grants, you cannot do that. If you're a city with budget, overworked caseworkers, we're extending the capacity of local government to support these people through these little nonprofits. And so every little bit that you can plug in there to make that work better is going to help out those people on the ground that are saying, what about me? I got left out, you know, can I have some help here?

**Kimberly Swartz** 16:12:50

Yeah, absolutely. All right. So I'm going to quickly switch gears a little bit, because I know we've gotten some questions about how to even get involved with these different taproot programs that Jim and I have referenced. So I'm going to touch quickly on that. But then I'm going to loop back. And Jim, I'm gonna bring you back on because we've gotten some some great questions from audience members. And I want to make sure we have time to address them during q&a. So for now, I will say thank you for all of the wonderful insights, tips, knowledge that you've shared so far. And we're going to bring you back in a couple of minutes. So, audience members, if you do have any questions for Jim, or thoughts or musings, please throw them in the chat so we can address those during q&a time. All right, I'm going back to the presentation. Bear with me as I switch things over. Okay, I'll zoom through this. But of course, always happy to answer your questions on the process, or give more detail if it's needed.

But now that we've covered how critical capacity building support is for nonprofits, especially in this moment, I want to talk about how you can actually get involved through taproot if that's something that folks are interested in. So we've tried to make it really simple and straightforward through our online, nonprofit and volunteer matching platform taproot plus, so we've designed taproot plus to be really flexible and nimble so that any nonprofit can get skilled volunteers no matter how big they are. So we don't have any budget requirement. We don't have any requirement on how long the nonprofit has been around for there's no requirement on who their leader is or what their leader looks like. We're open to all nonprofits regardless of mission as long as they're located in one of them. eligible countries, so the US, the UK, the EU, India and Canada. And so we're also completely free. So these nonprofits are never paying a fee to use taproot resources or to get connected with volunteers like you all. as I mentioned early on in the presentation. taproot is a nonprofit. And we exist to help other nonprofits. And so we believe in open access to resources, and this taproot plus platform is a big way that we're making that happen. And so, if you are located in any of the eligible countries that I just mentioned, you are also able to use this platform for free and use it as a tool to help you easily get connected with a cause that you care about. So it's a way for us to scale up the pro bono movement, and making sure that all those who want to give back through pro bono have a way to make an impact from the safety and comfort of their own home. Alright, so I'm going to zoom through the signup process, it's a pretty simple one, we're going to ask you for a few pieces of information.

If you sign up as a volunteer, you'll have to have some sort of resume or portfolio if you have an online version have that link handy. If you have a LinkedIn profile that can speed up your signup process as well. And then most importantly, we're going to ask you about the skills that you are looking to share are looking to donate with nonprofits. And so I think I saw Megan mentioned this a little earlier in the chat, we do recommend that volunteers have around three years of professional experience in a skill set that they're flagging themselves for. And the reason that we provide this guideline is that when nonprofits reach out to taproot for pro bono support, it's because they're understaffed. They're under resourced, and they might not have anyone in house with knowledge in that area. So for folks who are looking to learn a completely new skill, that nonprofit likely will not have anyone who can train you on that skill, or provide that really detailed oversight. And so that's why we really, we think that like two or three year cut off is an important one, because pro bono projects are generally not good places to learn or pick things up for the first time. But they're a great way to practice existing experience in new environments. So only five soft skills that you feel comfortable executing independently, without direct management or direct training from a nonprofit. And then, really quickly, I just want to show you what the interface will look like. We have when you're on the Browse opportunities page, you're going to see options to volunteer with organizations through projects, which are in depth partnerships that can last several weeks, you'll also have the opportunity to volunteer through one hour consultation sessions. So you can kind of see the breakdown here. consultation sessions are one time 60 Minute Calls, they do not commit you to any further work with that organization. But they're a great way to brainstorm, troubleshoot, troubleshoot solutions, or plan help the nonprofit plan for future in depth projects.

And so if you're new to pro bono consulting, I definitely recommend consultation sessions is a great avenue to really dip your toes into it. And then, of course, just a quick look at your user dashboard. After you've started signing up for opportunities through taproot, you'll have a built in this is just a mock up Dashboard right now. So it'll look a little differently for you depending on the actual opportunities you sign up for. But you'll be able to manage all of your engagements through this page, get in touch with the nonprofit point people see the status of your application, see the status of upcoming interviews or conversations. So it's a it's a, it can be a powerful tool for helping you manage those relationships. All right. So like I said, I really just wanted to zoom through that I'm happy to provide more context about the application process or the interview process, anything that you're curious about, but I do want to make sure that we have a healthy amount of time for q&a. So for now, I'm going to switch us over to our questions section. And I'm going to check out our chat to see if we Have any open ones ready to go? So as I'm doing that, if you have any other questions, make sure to drop them in so we can address.

Okay, so I see a question came in a little earlier about a written agreement put in place outlining expectations for the organization and the volunteer. Are there legal liability considerations that volunteers need to take into account? So it's a really good question. And I feel like Jim, you spoke about this a bit, when you were outlining, you actually have a written template that you typically ask the nonprofit to acknowledge before entering into work with them. So tapper does provide a standard, like volunteer agreement template, when you're matched together with a nonprofit on a project. And so definitely recommend checking that out, I would say, especially if you're handing over some sort of design collateral, this is where I would really encourage you to align with the nonprofit on how they are going to be using your designs, how you expect to be credited for those designs, etc. So I know the AIGA has some really great templates on the legality of that. And we provide links to those templates, when match on those types of projects. So it really recommends that it's an association for graphic artists. Sorry, I use an acronym and I shouldn't have. Thanks for the clarifying question, Andrea. So yes, there are lots of templates out there. But really, really encouraged and want to empower all of you on the line to lean in to ask these questions of your potential nonprofit partner. When you apply to a project, you submit your statement of interest, it's kind of like a mini cover letter telling the nonprofit why you want to work with them. The nonprofit will get to see your taproot plus profile, your statement of interest, your LinkedIn profile, if you've chosen to connect it, and so they'll have some details about you. And they'll tell us whether they want to move forward with an interview. It's during that interview process that I strongly recommend that you vet the nonprofit to see if they are going to be a viable partner for you as well. So ask them questions about the use of the intellectual property that you provide them with, how they intend to implement the outcomes, or the deliverables that you create as part of the project. Align with them during that interview. So you can tell if you're comfortable moving forward with that organization, or not. I saw a really quick question about recording. Yes, we are recording this event, we will send that out to everyone following the event. Hopefully today, if not today, tomorrow morning.

**Kimberly Swartz** 16:22:45

All right. Jim, I have a question specifically for you. Someone was wondering if you could tell us a little bit more about action map and how it works.

16:22:56

Oh, thank you for the question. Action map, basically, is a methodology on creating diagrams of business operations. And it's a special type of diagram. It's based on a technology is called data flow diagrams that I learned when I was back in the computer days. And we gradually and my spouse and I were using it sort of model. We noticed that people reacted well to it, who knows that people liked seeing the diagrams, they don't get to see their business at that level of operation. So we kind of follow that energy and ended up doing meetings with big companies in Silicon Valley, like Hewlett Packard, Intel National Semiconductor, we did work with Chevron, we did work for Pacific Gas Electric Company. And over that time, and then I documented all that and put it in a safe place. So I made sure I own the intellectual property. Later on, though, I kept saying to myself, this has got to be software, because I'm just up here doing the same thing over and over again. So we found a process that basically is very straightforward, and can generate these models by just asking people questions like a giant TurboTax. But you create the very interesting graphic diagrams. And at the same time you capture the subjective information, what do people care about? So you get a good balance, that subjective energy that drives things forward and the objective reality of the diagram. So this is all described on my website, that action map.com And I would invite anybody to go take a look there. And if you're interested in more detail, let me know because I'm looking for people to help me distribute the software who would like to use the software, I'm offering a certain amount of damage to people who want to become early adopters. So please contact me via the web. website or my LinkedIn, LinkedIn address, and I'd be happy to talk to you about in more detail

**Kimberly Swartz** 16:24:45

we can include, since it seems like you're comfortable with it, and our follow up note to the event will include your LinkedIn profile. So folks are able to connect with you after I would enjoy that. Yeah. And I'd be happy to support anybody working in the nonprofit pro bono space.

**Kimberly Swartz** 16:25:00

Great. All right. So I want to make sure we have time to address something Andrea put in the chat around, you know, being open and approaching these opportunities with empathy at the forefront and listening at the forefront. And, Jim, I know this is something that you really highlighted when we first started speaking, that's a it's a best practice for any consulting relationship, but especially when going in and working with these smaller organizations. And I really do want to take the time to mention here that this relationship is it's not going to be a one way learning street, you are going to gain as much from the nonprofit as the nonprofit gains from you, you are going to learn and benefit from their rich understanding of a social issue that impacts hundreds 1000s, potentially millions of people. And that is a massive opportunity for you to break down walls of ignorance and increase your understanding of the world and the society that you're a part of. And so there's a huge amount of education that you're going to take away from this experience as well, as well as all of these other benefits that we talked about earlier on, you know, like empathy, leadership, collaboration, project management, etc. Something else that I want to take a moment to mention here as well is,

16:26:34

Could I add some to that I'm gonna add, I think there's a view into other worlds that regardless of whether it's profit, nonprofit, I think the more that you can look into other organizations and look around and understand what they're doing better is going to be your professional career. There's just no substitute for because it's like having a bunch of jobs, bam, bam, bam, bam, bam, bam, you're just going to learn a whole lot about organizations, how they operate how people work in organizations. Just wanted to add that,

**Kimberly Swartz** 16:27:00

no, I'm glad that you did. And I was just gonna say one other thing around, you know, capacity building pro bono consulting, the whole benefit of this for a nonprofit is they are freeing up their time, instead of having to worry about marketing or strategy, or these pieces that maybe they're not an expert in, they can bring in an expert to be the leader in those spaces instead. And that's going to free up the nonprofit leader or the Nonprofit Professionals time to do the things that they are better at than anyone else in the world. Right? It's freeing up us all to lean into our specialty areas. And so you have the opportunity to take extraneous items off of a nonprofit leaders plate and allow them to lean into the items that they're uniquely talented at, which is then going to allow that nonprofit to accomplish more good for our communities.

16:27:59

That's a really great point. I hadn't seen it that way. But that's a really great point.

**Kimberly Swartz** 16:28:03

Yeah, we we should all be allowed to do the things that we're most comfortable, confident and skilled at and the world will only benefit from from that happening, right. So I see a question that just came in about liability emerging from consulting services. By signing up on the tap root plus platform, the nonprofit and the volunteer, both have to agree to the terms of conditions, and of engaging in our program, part of those terms and conditions free, the non free the volunteer, ie the pro bono consultant, and tapper from any liability. So that's not something you need to be worried about. That's something that taproot takes care of just in the legal space of anyone participating in our programs. All right. And then I saw a few questions earlier on come in around getting involved with causes in your local community. So I think Megan mentioned, we are currently working on making that a filter on the Browse opportunities page. I hope to have a positive update for you all on that front in just like a couple of months. It's something I have a meeting later today to look at the designs for that. So I do think it's coming soon. We have a little bit more power in the back end of our program. So I think I saw someone who's from Baltimore specifically. If if there's a special request and you want to see if there's anything specific to your community, just message us at the help desk and we'll see See if there's something we can do for you, we might be able to pull less just from the back end and email it over to you with some potential options. So let us now the filter is coming. In the meantime, we may have some workarounds that we can we can work with you on. All right, and I see some causes. I'm passionate about building equity, social justice, racial justice, dei work preserving democracy. There's some really amazing organizations working on these issues, and many more through taproot plus, I'd actually really recommend and Megan, if it's okay to put you on the spot. If we could share the link to the panel on voting rights that happened earlier this month, we featured or we were able to learn and hear from three voting rights, social justice organizations working in the taproot plus community, and where they specifically talked about the needs that they have right now, and how people can get involved with that work in and out of pro bono. So I'd highly recommend check out that recording. And there's many open opportunities to work with those three organizations specifically, but also many more who exist in our community. All right.

And then I think one last question, because I know we're coming up on time. How often are volunteers approached by people who need their services? Or do we have to go find projects? So right now, taproot plus is set up as a way for you to go and find the opportunities to get back. However, we do, occasionally, taproot classes, not the only program that tapper runs. So occasionally, we will reach out to you through email with other opportunities to work on teams to participate in events to participate as a speaker. And so whatever email you use to sign up for your taproot Plus account, make sure that's an account that you check regularly, because that's how you're going to hear about the other Taproot Foundation opportunities as they come available. And those might those are a little bit more flexible and far reaching. But through taproot plus, you as the volunteer seek out opportunities with nonprofits. All right. So if you dropped a question in the chat, and we didn't get to it during this event, like I said, you're going to hear from us either later today or tomorrow with a follow up email, which has the recording some of the resources that we mentioned, as well as Jim's contact information, so you can keep that connection going. And so that's an opportunity for you to connect one on one with myself or another taproot plus staff member. So we can keep the conversation going. Unfortunately, we have reached the end of this webinar time. But again, we're looking forward to connecting with you offline through email through future calls, future events, etc. So really looking forward to hopefully all of you finding a great nonprofit match after this event and getting involved with a cause that you really care about. So with that, I want to get a round of thank you. Thank you thank yous going for Jim, we so appreciate you taking the time and sharing your thoughts with us today. And it sounds like people really benefited from what you had to say. So really appreciate you, Jim. My pleasure. Right. And so appreciate everybody who who gave an hour of your time to us today. Like I said, we're going to be in touch soon and we hope to keep the conversation going. Alright, I'm gonna go ahead and close up shop. I hope everyone has a great rest of their day. Bye now.