**Centering Community – A Practical on Operationalizing DEI in Pro Bono Programming with Blue Cross Blue Shield of North Carolina**

Speakers:

• Soyini T. Abdul-Mateen, Principal Product Developer at Blue Cross Blue Shield of North Carolina

• Sophie McMillian, Sr Program Manager, Corporate Social Responsibility, Blue Cross NC

• Marquita Mbonu, Program Officer, Blue Cross and Blue Shield of North Carolina Foundation

• Sivi Ananthasingam, Consultant, Taproot Foundation

• Nora Walls, Associate Consultant, Taproot Foundation

Good afternoon. Can y'all hear us again? Awesome. Well, we're excited to be here and get started with our conversation today. I'm joined today by my colleague Mark Keita. And we're going to start you off with just a quick overview of our pro bono programming here, lead you through five key questions on how you can operationalize Di. And that is through our kind of lessons learned ups and downs through our programming. And then we'll move into a panel conversation that goes a little bit deeper into the nitty gritty of our design and intentional thinking, and includes two of our participants, both from the nonprofit organization, as well as one of our Blue Cross North Carolina employees who served as a team lead. I'm Sophie McMillan, I'm a part of the Blue Cross North Carolina Community and diversity engagement team. I serve on the corporate side of the house, I use she her pronouns. And for those of you who might not be able to see me, I have medium reddish wavy hair. I am a white woman with a blinking nose ring. So I am going to pass it over to my esteemed colleague, Mark kina. And then we'll get rockin.

13:20:53

Perfect. Thank you so much, Sophie. And good afternoon, everyone. I am excited to be here Markita info new program officer with BlueCross BlueShield foundation of North Carolina. And we're a health, a health funder throughout the state of North Carolina. My pronouns are she her. And I love the descriptions. I'm black female with a say what kind of jacket do I have on a gray jacket. And I'm also the CO lead of Blue Cross North Carolina's pro bono volunteer opportunity opportunities and programs that we offer. And I'm happy to start us off with a little history and context of how we got here and our why behind the work and why we're here today. So Blue Cross Blue Shield, North Carolina, the company and the foundation has partnered with Taproot Foundation since 2017, to offer opportunities for Blue Cross employees to work alongside our nonprofit partners to address those critical organizational challenges. And in 2020, the infamous 2020, we began to deepen our commitment to dei goals by integrating a racial equity lens across our programming. And based on that, that review and assessment, we realized a majority of our organizations we support it, were white LED and already a part of our existing network. And so based on that information, we intentionally redesigned our pro bono programs to support nonprofit organizations that promote health equity, and are led by and explicitly serving Black, Latino, American, Indian, and other communities of color. We know and I'm sure that everyone in this space that we know that these communities have historically been underfunded, and systemically faced in justices that, among other things result in health inequities. And at Blue Cross, we have had firm commitment to increasing our relationships to address structural racism and create more equitable health outcomes for everyone. And so through our new focus around our pro bono work, we're expanding our network of nonprofits. And we're working alongside of partners on the ground who are doing fantastic work and necessary work in our communities. And I'll pass it back to Sophie to give you some descriptions on the three pro bono programs that we offer.

We offer three different types of nonprofit pro bono programming. There is and some of that is based on you meeting our employees where they are along with offering opportunities that help nonprofit organizations meet their needs. So we have three different programs. Each of them are kind of designed around time based commitment. So our first one is called Speed consulting. And it is a half day session, where groups small teams of employees partner with nonprofit organizations to provide a 90 minute consulting session. So for those of us in a corporate setting, think of this as your phone a friend when you're trying to review a software and you really just need to call up your friend and it that IT department to talk about what kind of software should you be thinking about what would be the best use for housing this data, something like that, that is a question that you can have an open conversation with, and get a strong recommendation walking away from those of us in a corporate setting have the ability to phone a friend. And this feed consulting opportunity is a way for us to provide that to nonprofit organizations who might have smaller teams, or not have that same ability to be able to call a friend within their company.

We also offer what we call pro bono day, which is where teams of employees will help about six to eight nonprofit organizations to look at a challenge and a project, they can pretty much solve within a day. So these are really concrete, time based programs and projects, think database creation of a small type of inventory type database, or maybe it's the nonprofit organization presenting a marketing and brand plan, and going through it with detail with a team of employees to talk about where their strengths and places to pull out or change or something like that. So something that can be generally accomplished within a day. And then the last program that we launched and piloted two years ago, is our long term pro bono program. And that is a 10 to 12 week program that we match nonprofits, with teams of Blue Cross employees for that full engagement. Typically, these are deeper, more meaningful projects, because they take up more time, things like a strategic plan, or maybe it's a full financial analysis. Sometimes it is in integration into a new database platform. It's something that is going to take 10 to 12 weeks, and sometimes a little bit longer based on the employees, and nonprofits if they want to keep working together. So those are the three promo offerings that we have here. And will primarily focus on how we integrate diversity, equity and inclusion within all three of those. But one of the ones we'll highlight is our longer term engagement. Markita.

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Perfect, thank you so much for going through that. So being explaining our programming. And so here on this screen, you'll see some practical steps to operationalizing, the E O to your your pro bono programming. And as the Blue Cross team we were talking about, okay, what can we offer a share that would be useful to the group. And out of the conversation came five key questions that we used to redesign our program to really help create those outcomes that we're hoping for. And so Sophie and I are going to go through each of these questions, and hopefully through that, it will spark some ideas, or have you all do some self reflecting flexion on your own programming. And so I'll start with the first one, the first question is around nonprofit recruitment. And the question is, Who are you recruiting? So we want here, we want you to think about your dei statement, especially in 2020. A lot of organizations created the statement, racial equity goals and values. And so think about how does that tie into your pro bono work? Or how does your pro bono work or program tie into your organization's overall mission, around diversity around racial equity around addressing and meeting communities where they are. And so we think about the nonprofit focus, what worked for us that Blue Cross is that we increased our diversity of organizations that we support it overall, because we recognize recognize that we had a racially homogenous network, right. And because of our organizational goals, we were able to shift our focus to recruit new and diverse nonprofits. And so this was not just something that happened within our pro bono work, but the because of our organization, more strategic dei racial equity focus, it was happening happening across the organization.

And so that posed the opportunity for our pro bono team to be more strategic and be more explicit in who we want it to serve, and the why behind it. And in addition to thinking about your nonprofit recruitment, you also should think about your employer employee recruitment. So You want to make sure that you're recruiting diverse employees who have lived experiences who have diverse skill sets, right? So when you're thinking about, we want to divert, you know, crease diversity in the nonprofits we work with, you also have to think about increasing the diversity of the employees that who, who will be part of these teams. And so one strategy around that is to tap into and utilize your existing employee resource groups. So what are those groups that are coming together and based on different identities, and groups, tap into those be intentional, also add a sentence for employees to participate later, we'll get get into more detail around that'll provide some more ideas, and then offer a range of pro bono opportunities. Sophie went through our different three different pro bono opportunities that we offer, because they have different time commitments and different expectations. So this way, it's a way it's hopefully a way for more employees to become engaged in it, and then I'll pass it back to Sophie.

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Yeah, and I think one thing we really spend a lot of time on and would encourage you to as well is once you have nonprofits, in a recruitment standpoint, and now you've scrolled around with your employee recruitment, it is how are you matching those teams together? What is your thought process behind that? How are you keeping at the forefront skill sets, but not just hard skills that we talked about, but those softer skills, and more importantly, in some cases, is lived experience that could be matching with the nonprofit organization's mission, culture, vision and leadership? So it is how are you taking the time to do some frontline matching through, you know, some obvious kind of skill set, but really deepening your understanding with some of those key roles, especially in team lead roles with your employees, and your project manager roles? The other bit to that is the program oversight. So how are you setting your teams up for success? So now you have your nonprofits intentionally recruited, you've got employees thoughtfully matched to those teams. Now what now you've got to be able to set them up for success. It starts with training.

And so we talk a lot about setting time for cultural context, making sure that nonprofit organizations have the time to talk to their employee teams about the context of their community, and why their programs exist. Taking that time in space helps build trust, and it helps build the reasoning why any of y'all are in the room together. There's also things like checking in through surveys and phone calls, and maybe aside pinger to, on making sure your teams feel good and set up for success. And if there are moments, because let's be honest, there will be moments when things don't feel successful. And it feels messy, that you've created systems for feedback to come in and be able to pivot if you need to.

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Absolutely, thank you, Sophie and building on that. So you have your tools together. Everyone's been, you know, trained, and they're beginning to work together. So the next step is intentionality. You know, are you centering community? And that's the question we have to ask ourselves. And the question, we would recommend everyone reflect on that doing pro bono work in this room today. So in addition to recruiting diverse organizations, you want to go deeper and think strategically about providing that Pope pro bono support to build that authentic, and trusting community relationships, right. So how do you do that, and through some of our work, in our experience, leading with listening is the number one principle leading yet leading with listening, and you build time, like Sophie was saying, to learn the community context, and you show up and we encourage employees to show up not with a solution, which is so easy to do, because you've already read the scope of work. And you may have done some Google searching about the organization and you may show up thinking you have a solution, but pause and take time to listen to the organization and learn about the context and learn about the assets and the skills that are there because there's wisdom in that space is wisdom in the community and often will say that those who are most proximate to the problem on the issue, know the best solution. So show up trusting the organization to have though the expertise right so trust goes both ways. Next is meeting the community where they are so take time to learn about the organization's assets. If what they're bringing to the table, check your biases. And that comes from, you know, part of our training, we talk about that. But don't assume, ask the organization, what do they need? How was what's the best way for us to meet what's the best time, right? Be flexible, be open to pivot, because as you learn, sometimes scope and deliverables may shift and change.

So that initial scope of work or plan you had may change over time. So don't show up and be rigid, be flexible, and it's okay. Because ultimately, the goal and the purpose is creating a final product that the nonprofit team can use, right to meet their needs to do their mission. And then lastly, under this same vein, it's showing up differently. We want as employees as partners in this work to show up authentically, show with humility, show up ready to listen and learn and share the power because we acknowledge that there are power dynamics in the room. And we're not the only we're not. And I say only experts, because someone may be an expert in it, or maybe expert in data analysis. However, the nonprofit partners are experts in their community experts in the work that they're doing. And so we want to make sure that we're managing for that. And ask yourself, if you're, you know, planning and planning these projects. Are you creating a supportive space for nonprofits to show up authentically? And if so, how to, you know, track on that capture that? And if not, what are some things you can change? And just some reflection around that? And the last piece to this work, or the fifth question is around sustainable implemental implementable program outcomes. So are you providing ongoing support, and Sophie, in her piece mentioned about frequent touch points, ways to check in with the groups and I will say this, when you have more frequent touch points, be prepared for some uncomfortable conversations, because you will begin to catch some things that may not be working well in a group earlier on, right. And remember that each team member or person, a part of this team brings their own background, their own culture, their own dynamic to the space. And from that there will be conflict, there are various dynamics that are at play at play, and conflict will arise. But our role as program leads are to be facilitators to show up. So when you have feedback from a survey or feedback from a checking call, that we address it very similar, it's that routine, the type routine has been excellent and very helpful to helping myself with making sure that we address these, you know, conflicts that are that arose that may have started small and may have extra, you know, if we caught it before, it could have escalated, caught it caught it before, the very last week of what's the long term programming. So you want to make sure that you're having those check ins.

And lastly, building trust is really important and want to rely on building trust. And know that it takes time to build trust between employees and nonprofits. But the best way, one of the best ways to do that is to do what you say you're going to do. So if we say we're going to show up with humility and show up authentically do that if we say we're going to center the community, let's do that. If we say we're going to hold a meeting at a certain time, and we're going to start with listening and not show up with solutions. Let's do that. And that through that process, you begin to build trust with community, which will ultimately provide the best product right the best end result, and ultimately, lasting relationships between your organization and the community. And we had a lot of aha moments throughout, especially in particularly this last year, we had a lot of aha moments. But a few of the learnings that we had along the way that we want to share with you all is that pro bono work should only be shipping one piece of your investment pie, but not the whole picture. So at Blue Cross, we use the pro bono programming to establish new relationships. Remember, I told you

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Okay, sorry about that. So I told you that we had a homogenous racial, racially homogenous group, right. So one of our goals was to expand our relationship as fans of diversity and get to know more nonprofits and communities, nonprofits on the ground who worked with communities of color and led by communities of color. And so through this work, we establish the relationships and then we deepen current relationships, and use our current relationships to support the nonprofit's that we're already supporting by strengthening their work and to strengthen their capacity through the pro bono work. So this expanded our networks, our funding relationships, especially coming from the foundation side and the corporate side through their grant making. And then this is the opportunity again for new relationships, and pro bono is a way to increase A diverse pipeline, right? Sometimes nonprofits organizations don't even know how to get to the table where it is, or how do we build relationships, or who are the people we should be talking to telling them about the great work that we're doing? Well, pro bono work is one way of building that pipeline and begin to have that engagement with community. And I will say, I don't, we don't recommend that this is a one and done model, where you just engage through pro bono work with your new partners in the net said, this is just one, or the first, if you don't know these partners, the first touchpoint can be through our pro bono work. And then the last piece, and Sophie alluded to this, a little bit of talking about it, but this work will get messy. Okay, you may hear us talk about that throughout the panel discussion, but it can get messy. But it's worth it. It's about progress, not perfection, as we build trust, organizations will open up to you more. And that's something we saw on this last year is that as we had, these weren't the first touch points. We already had some of these nonprofits were partners of ours are part of cohorts that we were investing in, and they begin to build trust in us. So they spoke up about what's working for them and what was not working for them. Whereas in the past, we did just really have the everyone's like, Oh, everything is perfect, when it may not have been perfect. But the good thing about organizations trusting us and being able to speak their truth to power is it only makes us better partners. It only helps us to refine our programming, it allows us to learn, it allows us to have those tough conversations with team members about how they're showing up because they may not know right, because a lot of people who sign up I think most employees who signed up for this care about the word care about the mission and care about giving back. But sometimes people show up with their person, different personalities, cultural differences of backgrounds are at play workstyles. And then considering that we work within white supremacy culture, like all these things show up. And so we have the opportunity to address those and have those tough conversations. But embrace the mess, hashtag embrace the mess, it will not be part it would not be perfect. And that's okay. Because that's a part of the process. That's the part of the work where you begin to get deeper, it will get a little messy. But if you have a strong team around you, so that you can talk it through and then reach out and allow us to be learning opportunities for all the partners involved. It will benefit the community at the end. And that's our ultimate goal. Thank you. And now I think that we think I know that we're going to have some conversation around what that look like for our team and then our community partners in the work and so I'll pass it to Sydney.

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All right, small technical issue. Thank you so much, Sophia Markita. for setting the stage. I'm really excited to move us into the panel portion of the session to really dig into those five questions a little bit more and give you more specific examples of how we operationalize dei and those five questions. In a recent 12 week long term pro bono program that we ran with Blue Cross North Carolina I should introduce myself my name is civvy on in the signum pronouns are she her hers? I'm a consultant with the Taproot Foundation and the moderator for today's panel. For those who can't see me, I'm a South Asian woman with shoulder length black hair and a tan tan blazer. You've already met Sophia and Markita. So we'd love to give them the floor to our other panelists. And here, what brought them to this panel today. So Nora in the room today, we'll start with you.

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Thanks, Debbie. Um, so those of you who are in the room already heard me say my name is Nora walls. And I'm an associate consultant on the advisory services team at taproot. So I had the pleasure of working with civvy and Sophie and Markita on that 12 week program that she just referenced. My pronouns are she her, and for anyone who can't see me, I am a white woman. Shoka medium ish brown hair, black turtleneck, and very excited to be here because I think this is a really special program that we get to talk about. So I will now hand it over to Sony.

13:44:00

Hello everyone. I am Sweeney Abdul Mateen, a principal product developer with Blue Cross and Blue Shield of North Carolina. My pronouns are she her is those that cannot see me I am a black woman with a brush cut very, very low and a hoop glasses in No hoop earring in my news. I was the team lead for our program for the the longtime Pro Bowl Bronto program with wounded healers. And I it was the most inspiring work but I'm sure we'll dig into that, but I love being here.

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Thank you. Thank you so uni, and next I'll pass over to Terrance. Hello,

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my name is Terrence Johnson, he him his pronouns. And I serve as the Interim Executive Director of wounded healers of North Carolina, and I am wearing blue and white shirt but now shirt have about shoulder length locks. And I'm an African American male. And what we do at Windy hills and our clients, we provide peer support. So one on one mentoring to individuals being released from incarceration in orange and Durham County, North Carolina. And what makes our organization unique is that it's led by people with lived experience of organization. And that is the model that we're using is that our one on one mentoring is provided by people who live support, with lived experience of incarceration, coupled with certified peer support specialist training as well. So definitely appreciate the intentionality of Blue Cross Blue Shield who designed this program and had a great experience working with Salini on this project as well. So I'm happy to share my experience as well.

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Excellent, thank you so much, panelists. So let's dive right in. I wanted to highlight first one of the most. The one of the things that I loved most about working on these programs with Blue Cross is the intentionality behind the nonprofits that are selected. So supporting nonprofits that are led by and explicitly serving Black, Latino, American Indian and other communities of color. as well as the other side of that and taking the time to educate Blue Cross employees to create a supportive space for these nonprofits to participate. And Margarita you highlighted this earlier, but we know that nonprofits already faced challenges in needing to keep overhead costs low, but program impact high. And for nonprofits led by in serving communities of color, those disparities are even greater, so less access to funding and pro bono opportunities, which means smaller teams and fewer resources. And so I'd like to start the conversation first by turning it to you, Sophia and Markita. Again to tell us a little bit more about how you selected the organizations that you wanted to support this year in this year's pro bono programs. And how blue Cross's dei statement and racial equity values helped guide the intentionality behind that selection.

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We'll all start with it. It was hard, it was hard to select organizations, because we had a strong group of organizations, which to me felt like a marker of success to some degree. We had an incredible group. And for us here on the corporate side of Blue Cross our purpose statement is to improve the health and well being of our customers and communities. And then we have a little tagline that says we won't stop until healthcare is better for all. And that for better for all is where we ladder up all of our diversity, equity and inclusion goals and work but also unlocks for me and my team and the community and diversity engagement side, deep understanding and commitment to health equity. So that means recruiting organizations working in communities that have been historically marginalized intentionally, in order to increase the health outcomes because we believe that we won't stop until healthcare is better for

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all. Absolutely, in a lot of what Sophie said, I echo that for the foundation. Same, you know, some of the same organization or same umbrella. And our mission is to improve the health and wellbeing for everyone in North Carolina. Right. So very similar to the corporates. And with that focus. We have more if we began to do more of funding, provide more funding opportunities and trending in the right way to say it will provide more funding opportunities to identity based groups or those groups that have been underserved or underfunded rather. And with this election process this year, we wanted to invest or provide that pro bono support to those organizations, newly established relationships that we've had with him particularly to You know, organizations and American Indian organizations, but as we increase in this patch, you have done some significant grant making in those two areas. And so we saw that this pro bono program and opportunities would align greatly with the work that the ongoing investments and work that we're we're doing to support our Latino grantees. And not just the grantees that we have, but also their networks. So we utilize them as a way to share with some of their networks that they're a part of like some smaller nonprofits that may not even know that we offer this type of service or the services available today. So we were able to do that I echo what Sophie said, it was very difficult because we have a limited, we have limited space. But I would say that it was successful. And we had some great partners that showed up and participated in the program.

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Thank you, Markita. And an echoing that I really appreciated that even though it was a smaller program, there was the opportunity to reach some organizations that weren't necessarily grantees of Blue Cross to continue to expand those opportunities within North Carolina and across it. And so with that, I also want to turn it over to Terence, curious as one of the nonprofit's that participated in this year's long term program. How did you feel when you heard about this opportunity? And was it your first time participating in a pro bono program?

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Yes, so it was my first time participate in a pro bono program. And it was shared to us to the strength in Quantico, or another initiative of Blue Cross Blue Shield of North Carolina. And what I saw this as an opportunity, what made me interested in flying is that it as a small nonprofit that's just getting off the ground is that we are kind of we definitely need additional resources. And the staff cannot do all the work that needs to be done. So it's a great opportunity to get external support for an important initiative we need to achieve to build a more sustainable organization. So that was a great opportunity to get some external support, where the staff doesn't have to lead a big initiative for the organization as well.

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Thanks, Terrance. And as a nonprofit staff member, I understand completely we're small we work small and mighty, absolutely. And wearing multiple hats. So understand the opportunity for reaching out to different resources. And looking at the other side of this, of course, we have the nonprofits that were intentionally selected for the program, as well as looking at the employees that are intentionally recruited to support these nonprofits. And so Nora in there, I'd like to turn it over to you to speak a little bit more about how we match teams. So thinking about when you're approaching matching teams together to support nonprofit participants, what do you look for in an application? And what questions should we be asking employee applicants?

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Thanks, me. So with employee matching, it, of course starts with sort of the skills based matching that probably a lot of you are already very familiar with. So we meet with the nonprofits to figure out exactly what skills are going to be most useful in supporting their projects. So that's where we start, but it's certainly not where it ends. And we definitely want to look at soft skills as well, which can be a challenge, because at taproot, we do almost all of this via survey. And of course, those are surveys that are going to people who are already really busy with full time jobs on top of volunteering to do this pro bono work. So we want to think about keeping those surveys as short as possible, while also also asking some really meaningful questions. And I think that this year's program really highlighted the value of looking out for those soft skills. So things like who has, you know, that leadership ability, who's comfortable diving into some of those more potentially uncomfortable conversations around these dei goals and cultural differences. So incorporating things like that into the way that you're matching employees, and being really thoughtful about that, I think added a lot of value to this program. And I know that we are short on time, because the six of us could talk about this all day. But want to make sure that we highlight that one of the things that Sophia and Markita made sure we did with this program, which was really special and really beneficial was incorporate lived experience into the employee survey. So with the nonprofits that we got to work with this year, we were supporting groups who work with people who have been incarcerated people experiencing homelessness, black, maternal health, all these different issues, that there really is no substitute for having a personal connection to those things. And so something that Sophie and Markita made sure we did, that was really, I think, changed the program entirely, was made sure that we made space for employees to share that information about some of their personal connection and lived experience so that we could take that into consideration

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when we were matching those teams. Thanks, Tara. And I will also highlight that part of all of your roles as the employee engagement, folks, as the CSR folks is providing insights that we not, we might not be able to get directly from that application. So something that Sophia Markita, both did really well was providing insights into employees that shared more with us about those soft skills, things like internal team dynamics, that Blue Cross that we might not know about that could affect how employees show up, and how team members work together. And of course, you know, your colleagues more personally. So those those lived experiences that might not come across in applications, and the connection that they might have to the nonprofit that they they're assigned to support. And so with that, that thought about lived experiences, Sweeney and Terrence want to ask you both how the skills match as well as that lived experience and perspectives of the individual team members tied into the success of your project and your work together.

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Oh, it doesn't matter. I'm giving out initial thoughts. So you can go. Alright, so I will say that what is important to us and being led by people with lived experience of incarceration is a true commitment and passion and understanding that each one person we work with has for the community that we hope to serve. This isn't kind of a, this is a very personal issue mean that all of us who have had loved ones impacted by the criminal justice system, and it has taken away many years from our loved ones and time we could spend with them, because of either health issues or something. So that commitment, and that determination is very important. So when we had people with chronic BlueCross BlueShield team, that also has been impacted by justice upon Hallett live experience, have loved ones that in experience that really shaped that kind of initial meeting and the framing of that conversation would have been, they are not going in kind of asking, or they're not going in with the solutions and forcing the solution and listening and building common understanding about this impact as well. So definitely appreciate that. And one thing that Billy may have that live experience, and having that shared passion, determination, and personal spans really helped build that connection, that trust that bond, and made the work. Fun and compelling to do together.

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I think he explained it perfectly. But I would say, not knowing that there was an organization that existed, I didn't know that this was the experience I needed. Until I you know, we talked with Terence and a number of the founders and the board members with wounded healers of North Carolina. And I think just as my experience of implementing programs within healthcare that our benefit all of North Carolina, you know, all North Carolinians, you know, 100 counties, we had to take the same approach, we had to understand the why. And so we asked a lot of questions over and over again. Because, you know, sometimes folks say this is what I want. But that doesn't necessarily mean that's what they want. You have to kind of keep asking those questions, deepening those questions. You know, and Terence, you know, and a lot of the other members, they made themselves available at all times, like, you know, can we talk through this, what is your experience here? And then we were also able to share our, you know, our experiences our family members and the things that they struggled with as well. So it made it very real. And, you know, yes, it was 12 weeks, but we aren't stopping, we actually have a meeting on Thursday to continue having the conversations because, yes, we wanted a strategic plan. But I think it's a little bit more than that, like, you know, we have the draft, but I think we have to go even deeper and have those hard conversations, which I'm, I'm ready for.

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Thank you both. And I think you too, are an example of a an amazing team that has continued forward. And on the other side of it, we have employees who are able to participate in just the 12 weeks but not able to participate beyond that. And so, Sophie wanted to ask you in terms of we know employees want to participate in this. They might not necessarily have the lived experiences that they want to connect, but we'll have the skills match. And we know that employees are busy, especially at Blue Cross when open enrollment hits, so So what recognition recommendations do you have in terms of incentivizing employees to participate and really prioritize and dig into this work?

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Yeah, I think to your point on matching lived experience, I think it's a thoughtful approach of key roles and making sure that is on the team. But you're probably not going to get everyone on that team that has deep lived experience. But Sweeney is team lead, that's a key role to have that understanding, and leading with empathy. First. I think from a busy standpoint, we are busy, it is open enrollment, I hope y'all are signing up for your own health benefits, or reminder from all of your companies here. But we use a combination of incentives to help employees be able to take the time and wants to take the time. So we use institution incentives like a dollars for Dewar's program, where we have $10 per hour for volunteering, we offer eight hours of PTO for folks to volunteer, you have support from the community and diversity engagement team. So all of this work, helps employees feel supported in doing a complex project like this. And then some of we're very open about some of the benefits that employees can have in participating in this program. So you just got chicken skin, when you said, this was a program that you didn't know you needed, but you really needed. And that's the kind of thing that if you could jar it up and tell people about you should. And so we tried to incorporate those experiences in our recruitment materials. And in our trainings, we also encourage people to update their LinkedIn profiles, their workday profiles for internal mobility opportunities. This is an incredible networking opportunity. There are multiple teams that have directors, vice presidents, as part of them, that employees might not be able to work with in other ways. We also encourage folks like Sweeney to share with their manager and put this on their their work plan and say, This is what I'm working on to increase my professional and personal development skills.

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Thanks, okay, then starting to think a little bit more about. Now we've have all of these pluses. We've done all the planning, we get to the time of the program. Of course, these things will vary between programs between companies. But Sophie Markita, Nora, for you all, as you know, we've faced some hurdles along the way, between needing to adjust the scope of a project halfway through the program and managing varying personalities. So we'd love to hear from the three of you in terms of challenges that come with this work, and what other program leaders should keep in mind as they navigate similar challenges in their pro bono programs. Yeah, I think

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one thing I keep in the forefront as a program administrator is whenever you cultivate a space for other humans to interact with each other, you have a responsibility to that space. So that responsibility is if something does go awry, and we had one team who had a very strong mismatch from their team leader who experienced micro aggressions to the point that they felt disrespected, that we immediately intervened, had a pretty difficult conversation with that employee team lead to talk about the micro aggressions, how his identities, were creating bias in those situations, naming what those biases were. And then we asked him to step down from that project. And part of that is, I would offer to y'all to flip the script on what the success outcome is here. Often these employee programs, we put the employees first and the experience of the employee first. And we flipped the script, and made sure that our nonprofit success was first in at the forefront, which led to a difficult conversation with this team lead, ultimately asking him to get off of the project. But what happened was our nonprofit was successful. And that team leader got an experience of calm concrete feedback that he might not have otherwise. And my hope is that he's grown from that experience as well.

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I would add to that, I think where a lot of the challenges that we faced came from, is the fact that a lot of what Sophia and Markita are focused on with centering community and trying to create more equity in the nonprofit space, those things aren't necessarily standard practice in this work yet. And so people aren't always used to it. So in the incident that Sophie just referenced, where we did have that team lead mismatch, when we met with him, we could tell we could understand his frustration, because he was saying to us, well, I've sent the agendas, I've created the spreadsheet, I've done XYZ. And so he was coming at it from a place of I have the technical expertise and skills that goes into that skills match that we talked about. So I don't understand what's missing. And so we sort of had to, in that conversation, talk a little bit about what really the goals of this program were, and that it is about really nonprofit impact first, which maybe isn't always the way that things have been done. So I think part of it to Sophie's point about flipping the script is about pushing your volunteers a little bit to think differently about why they're doing this work.

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Absolutely. And I wanted to add your a receipt, exactly what I was thinking is, we have to continue to ground ourselves in the why behind why the why we're doing this work, and if not, and again to center our community. And I like the way Sophie said it to flip the flip the script, to not do business as usual, to do it differently. And this also continues on with us building trust, with community members showing up and doing the things that we say that we're going to do. And so how the team responded immediately, when they got received feedback from the nonprofit in this particular scenario, we told the nonprofit in the very beginning that we will be there to support them. And we're going to show up in a different way. So when we got wind of this was something was was was was offered this this or this particular team, then our leadership team immediately jumped in and had a common beginning to have those conversations and showed up differently, which ultimately, will build continue with building that trust with that nonprofit, as we continue to do this great work.

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Thank you so much all and so you need Terrance anything you wanted to add in terms of any challenge that challenges that you both faced in working together throughout the long term program?

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I would say just the only challenge it wasn't so much with wounded healers at all, I would say it was my own work. Trying to kind of prioritize. You know, I think we've talked briefly just internally that we have a lot of meetings all the time. And meetings come up all the time. And so when you plan that, you know, ordinarily on Fridays, like we are to have light meetings or no meetings, and then four or five are added over my meeting my standing meeting with my nonprofit. It is what do I do? Right like that? Because we have something I need to write a status we need to touch you know, just touch bases with terrorists and see where they're going, what they're doing. And, and Terrance was wonderful at all times it was yep, I can I can meet later in the day, I can do this. Hey, let's talk on Monday instead early. It is there's that that pivoting and adjusting that. I think everyone on our team had even our in person sessions that we've had everybody kind of gave their insight. Yep, I can do this. I can be there. We like I said we met last week. We have a meeting on two on Thursday. And it was always this is when I'm available. I might be late, but there's always I think it's the continuous communicating. I respect you you respect me. And so it was never an issue. So I wouldn't say it was an issue. It was more of I have a lot on my plate. Let's figure out how to balance this.

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And I definitely kind of we had the greatest fans of the work working with Salinas team, but I will say the one thing I was kind of as organizations decide whether they want to pursue this finding is that the hardest challenge being a nonprofit, especially someone that's a person of color is that when you work in this area, you kind of are have to be the final say about when something isn't working. And that is a big burden is placed on nonprofit organizations think that that is great to know that when you need support is there. But I think that's important that organizations notice that you that is a big ask of nonprofit organizations to be the accountability person to say, this isn't right, I need to say something. And that is something that is important to acknowledge and provide support. And also just say that, because that is the important message that the nonprofit leaders need to hear, because the goal isn't to have everything go perfect. The goal is to learn and work together. And they look, any challenge I've had with Blue Cross Blue Shield is that I use it as a learning opportunity to learn and grow and to build that trust and that shared support for one another and caring for one another.

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Yeah, absolutely.

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I think that flexibility that the pivoting the adjusting, it all takes time to get to a point where you're comfortable being able to do that. It could be frustrating if you're moving meetings around if you're not communicating it early enough. And so it takes time to build that relationship together to be able to communicate and say, Hey, I'm so sorry, something came up, we have to shift and for both parties to be okay with that and move it forward. And I think that ties well into my next question in terms of as program facilitators, Sophie Markita. Nora, how can we make sure that we're building that community and fostering that community amongst our volunteers and nonprofits?

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We'll say just starting with kind of going off what Tears was sharing, starting with being open and transparent, from the very beginning, showing up authentically, the team members and us as well, I think it starts with us, right? Being program leaders, because we set the tone for the entire program, by encouraging the employees to show up as their authentic self. So if you don't have that lived experience, like we were talking about earlier, but you're willing to learn, you're willing to share the power and the dynamics and build a relationship, because ultimately, the purpose for this work is to create something that supports the nonprofit. And also for facilitators of the program, being willing and open, as you heard earlier, having those hard conversations, but pulling in extracting those valuable lessons learning, and through those difficult conversations, seeing how we can refine and revise our program. So the program next year that we're going to have a look a little bit different because of the learnings that we've had over this past year. So being open, like we I said earlier with the employees, don't be rigid and be flexible, but also as facilitators, the leaders of this work, be flexible and be open to pivoting your program as well, so that it fits in that you show up as the best partner for your community. Yeah, I think

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I think I was just gonna echo Markita and say that humility is one of the most valuable skills as program leaders here. And Terrance just charged us all of he can't be the only person in the room Colin and raising the flag if something's going wrong. So how are you as leaders? How are you empowering your employees to do the same, helping them understand those situations and those dynamics, because the burden should not just be solely on our nonprofits. So I think it's those things of when you hear feedback, pivot, be humble in that know that you're probably going to be wrong first. And be excited when you're not. And be open to learning and actually take the actions to learn.

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I think one of the biggest ways that Sophie and Markita were able to really build trust with both employee participants and nonprofits in this program where through those frequent touch points that they've mentioned. And I think it's important to note that there were midpoint calls where you actually get on a zoom and talk to them, but also surveys, which I think are a good way to be mindful of the fact that you're working with often already stretched thin nonprofits, they don't have time to jump on a call with you and explain everything that's going on. But in both cases of these conflicts we've referenced that we had to sort of jump in and address. We first found out about those because of survey feedback. And I think those are really important ways to at least a little bit acknowledge what Terence was highlighting which is we know that things might come up and it shouldn't be on the nose. on profit to have to call that out every time. It's not a perfect solution, but at the very least you can use those touch points to make it clear that you want to hear the feedback and that if they're willing to share it with us, we will shoulder some of that burden of having to have those conversations.

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Well, as we know, the work doesn't stop just because the program is over the the flexibility, adapting continuing that that trusted relationship. We know that all of the challenges for nonprofits won't be solved in a 12 week pro bono program. And so final question for you Markita, how does Blue Cross work to continue to build those lasting relationships with nonprofits, especially those that might not be current grantees of your your program, or current grantees of your organization?

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Right, so our work is driven by community, our work is driven by our and I was able to look across foundation were solely a great funding organization and our investments are interested always be driven by community input driven by the need, and how it feeds into a larger strategy. And through pro bono work. And being a part of this. We we offer the opportunities for nonprofits, to have one on one conversations with myself also with Sophie, because they have their strategic priorities as well. And learn more about these organizations. What what are they currently working on? What are some of their future goals aspirations have made, they may want to expand or deepen their work and community. And it helps us to see how they're connected to our current focus areas. I will say personally, with the foundation through some of these conversations, for example, it was a organization that went to longterm last year that had a focus on food. And in the foundation, we were doing some strategy around food as medicine and investing in nonprofits in that space. So I was able to connect that nonprofit with some of my colleagues to get them tapped into some of this food as medicine initiative, we're in kind of first ground on the ground level work in investment. So I see that as having these conversations and learning more about these new partners through our pro bono work, we're creating that diversity pipeline into future funding, because we understand nonprofits have to, they need resources, ie dollars to support the work that they're doing that ongoing work. But also, with us having a connection, we're able to connect them to other foundations and other partners in philanthropy, who have, who they're really aligned with their strategic areas. So I see that also as a way of opening doors and making connections outside of Blue Cross with other partners in this space to support their work. Thank you so

14:17:21

much. Makita, Sophie Soini, Terence and Nora, I know we're running short on time. So I just want to leave you all in the room with the responsibility of pausing to examine your current and future programming. And ask yourself the five questions that we highlighted today. Who are you recruiting for these programs? How are you matching? Are you setting your teams up for success? Are you centering community? And are you providing ongoing support, the work doesn't stop after 12 week programs and after one day programs and and it's up to all of us as people who are working in this space to continue expanding these programs. So use those questions to enhance the impact of your programs, shift yourselves from business as usual and commit to accelerating trust, connection and impact by centering community in your pro bono approach. And so with that, we'll open the floor for q&a for I think we have two minutes. I know there was one question here on how do nonprofits get involved with Taproot Foundation to be considered for pro bono support from taproots network of partners? And are there any upcoming events? So I think with that one, check out taproot plus.org, that is where you can find out, you can submit your projects for pro bono support to receive support from our community of consultants. And if Lindsey is still in the room and wants to come off and answer that question a little bit further, we can turn it over to you.

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Or I'll use this as a little twofer. excuse to get over here near Nora and wrapping up in just a moment. That's a great place to start tech plus.org. Prepaid is open and accessible to every nonprofit organization. Also small businesses, educators and a few others. So for folks who are asking that question, that's always a great place to start. And we always really try to nurture and foster that broader Community of organizations and leaders. So that is we have the chance to partner with wonderful partners like Blue Cross Blue Shield, North Carolina foundation. We're aware of organizations out there who are interested in and seeking and working with us to engage in this support. So get your eyes on your inbox, because we'll be following up for everyone who's participated and registered for the pro bono Summit. And we really invite you to be a part of our broader community. And we'll be following up in that way as well. I think we're supposed to be at wrap up time, I'm going to cheat. This is my one cheat. I think I'm allowed. I know that there were a number of questions that came up. So I thought I would just pause for a moment to throw it back to a monitor to see is Do we have time for one more question directly related to this topic?

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I would say yes, because I love hearing from the Blue Cross team.

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I'm a fast talker. I promised my closing remarks to five minutes. I'm playing my one cheat card. And I know it's gonna be hard to pick but why don't we bring one question in from the q&a to our panelists. And then I'll wrap this up for

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the day. Oh, my cheat card might have just bulldoze right over.

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Alright, I'm gonna put my cheat card back in my pocket. For the record, I did not spend it, I get to use it tomorrow, I just want to extend a huge thank you to our panelists are part of this session. I so appreciate you digging into all of the insights, thought learning work that went into conceptualizing everything that you brought to life to this program, and what you've been open and willing to share. I know I was taking a lot of notes, and I'm familiar with this program. So I hope all of our attendees in the room and virtually are walking away with a lot of nuggets and ideas in addition to these incredibly important questions that you share it for us all to pose to ourselves, regardless of where we are in this ecosystem of this work to be able to bring thoughtful programming to life. So with that, this session also wraps up day one of the US pro bono summit, I hope that you've had the chance to bring into this and it take away from this, even just a nugget already of what we're aspiring to do. And really focusing this your summit on accelerating trust and connection and impact. That's really the through line with all of the sessions and all of the topics and attendees that we've had the chance to bring together today, digging in on pushing a bit on poking on some of these big conversations, questions and topics in order to really understand and advance us all forward and what can really accelerate those four pieces. So tomorrow, we have some incredible sessions, speakers and participants lined up as well. I'm looking forward to bringing this conversation back into the mix. They're bringing in some of the key themes from today really demystifying, and naming what those core areas of focus, how we define success, and how we're going to be signing programs should really be considered through and what lens, being able to be intentional about the way that we partner and bring all the assets to the table so that one plus one can make five as we heard from earlier. And then being especially intentional. I don't want to paraphrase all five questions, and then we'll share them out. But being especially intentional, then in how we can operationalize those learnings and bring them in to thoughtful program design. And not be scared to have the hard questions, ask the hard questions and have the hard conversations. And I hope that's the spirit we can all continue to bring back into day two of our US pro bono summit tomorrow, and ensuring that everyone who's a part of this conversation is bringing those insights and thoughts and their full selves to the table. So with that, I also want to say a huge thank you again to our sponsors and making sure that we could all be here today, whether in the room or online and making sure that we keep this conversation as open and inclusive as possible. So thank you again to 3am to Johnson and Johnson and Prudential to Comcast, NBC Universal, and to AIG for being able to help make all this technology and connection happen. For our folks online. This is where we leave you. I hope you have a pleasant end here afternoon or evening, depending where you're at in your day. And looking forward to seeing you tomorrow. For folks in the room. Please join us for a little toast to probono out in the other room as thanks for being here with us as a part of this conversation today. And I look forward to seeing or hearing all of you virtually tomorrow for day two of the program. Thank you