Taproot Panel: A Conversation with Experienced Marketing Volunteers

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**SPEAKERS**

Kimberly Swartz

**Kimberly Swartz** 09:02:11

Okay, so with that, I'm going to officially get things rolling here. Thank you so much everyone for joining today's events conversation with experienced marketing volunteers. On behalf of the whole taproot team. We're excited to have you here for this lunch and learn or maybe it's a breakfast and learn since we've got some folks on the West Coast, West Coast to today taproot is joined by a panel of some of our most experienced pro bono consultants from the worlds of marketing and advertising and communications, AS social media, digital, etc. So this is going to be an open conversation on the ins and outs of skills based volunteerism, specifically, talking about these volunteers experience in the marketing realm, and giving back that marketing experience to nonprofit partners. So we'll be discussing the impact of giving back in this impactful way, AS well AS tips for successfully consulting with nonprofits. So I really appreciate everyone who submitted questions upon registering for this event, we're going to be using some of the most popular questions to kick off our panel.

But we also encourage you to use the q&a box, or the chat box, whatever you're more comfortable with, or familiar with using and zoom. Use those features to ask questions throughout the conversation today. And then time dependent towards the second half of the event, we're also going to invite folks to raise their hands, using the zoom raise hand feature to come off of mute, and ask questions or chat with our panelists live AS well. So a few additional logistics notes before we officially dive into things. We are recording this panel, we don't want to miss out on any of the great insights that our panelists share. And we'll share the recording with everyone who's registered for the events. And it'll also be published on the taproot site for easy viewing after the fact. We will ask folks to keep themselves muted. AS mentioned, we're going to be using the q&a box throughout the event. And then later on, we'll ask you to use the raised hand feature in the discussion if we have placed to take those live questions where of course, then you would unmute yourself. And if you need any tech assistance, please shoot a private chat to my tapper colleague on the line. Megan, if you can give a little wave, Megan is doing all of the amazing back end and logistics for this event. And she would be more than happy to assist if you're having any issues throughout. So with all of that said, I just launched a quick poll. I'd love to get a sense of the folks, folks on the line your experience with doing pro bono being a skilled volunteer for a nonprofit. And great it looks like so far we've got a good mix between some folks who do have experience and then folks who have no experience at all. This room is big enough for all parties, right? So we'll we'll make sure we share perspectives from all ends of the spectrum and answer questions for folks who are at both ends of the spectrum AS well. So let me share those results with you. So you can get a sense of who you're in the room with. We've got a good mix of of community members here, which will make for a really great discussion. All right. So with those logistics out of the way I want to get things rolling. My name is Kimberly Swartz, my pronouns are she her hers. I'm located in Charlotte, North Carolina. And I'm taproots, director of community engagement. And I'll be the moderator throughout today's panel. So we did have a few folks who signed up for this event shared during registration that they are completely new to taproots our nonprofit. So I'll just take one additional moment to introduce ourselves.

Taproot Foundation is a US based nonprofit that connects nonprofits with the business support that they need for free. So we do that by facilitating connections with talented professionals from the worlds of marketing, HR operations, finance, IT strategy and more. So to date, we've connected over 30,000 volunteers with 10,000 unique social change organizations for pro bono services totaling over 300 million. So the pathway for finding volunteer opportunities throughout organization is taproot plus, so if you're here and you don't yet have a taproot plus of account, we highly recommend that you go ahead and create one so that you're able to act on all of the really great advice and perspectives that our volunteer panelists share with you today. And I think Megan, if I could just ask you to throw a link in the chat to make it easy for folks to create their their taproot account if they haven't already. So with that said, I'm delighted to introduce our speakers for today's conversations. So I'll start with Carissa McNair. Karissa is the director of marketing for a SaaS product practice at Milliman, which is an independent risk management and benefits and technology firm that serves a spectrum of organizations which include our business but also governments and nonprofit organizations. She also currently serves AS the CO vice president of membership for the International Association of Business communicators. And with their New York chapter specifically. So Carissa channels her lifelong love of learning and passion for the arts, and education and appreciation of diverse global cultures into community service. And she really works to uplift people from marginalized communities, including military veterans and their families. Carissa is also an active longtime pro bono consultant for the Taproot Foundation. So I can share I've had the personal joy of volunteering alongside Karissa at pro bono events through taproot in the past. And so I've experienced her incredible consulting skills and commitments to nonprofits and actions. So really appreciate having her here. And we're definitely going to get some great insights from our perspective. Next, we're joined by Tom Smith. Tom is a digital analyst, marketing strategists and marketing and technology consultant who would develop stories and content to help companies use data and technology to improve user experience and the customer experience while reducing costs. So he's worked with 1000s of companies in 18 Different industries AS well AS more than two dozen nonprofits.

And in addition to that, and interviewing executives and writing articles on the current and future state of technology, he consults with companies to help them develop and implement content and marketing strategies. Tom has been a consistent taproot community member, Tom, I went and looked checked your account out right before this event, and I saw that you've donated at least one project every year over the past several years and social media strategy messaging, branding, and more. So really fortunate to have you join us AS an expert speaker today and really looking forward to hearing from you. And then last, but certainly not least, we're joined by Jessica ankus, who has been building health and pharma brands for over 10 years, AS she has experience in marketing strategy, planning, customer experience and engagement, Insight gathering and campaign execution, and really is mastered digital non-personal promotion, including US media channels of engagement and omni channel strategies, and leading sales teams. And Jessica, I will add in here to is one of taproots more prolific volunteers from 2022. I saw that she's worked with over four separate nonprofits on projects and just the last year alone in conducting audits of their organizations, marketing strategy and use of channels and then providing expert recommendations on next steps or what their strategy should look or feel like arranging to program design, helping a nonprofit pull off their Giving Tuesday campaign and more.

So really, really excited to have Jessica here with us today. And really appreciative of the knowledge that you'll share with her team, but also the community members who were able to join this panel today. So the work that taproot does, all of those impact stats that I rattled off a few minutes ago, when I was talking about our nonprofits work, they truly would not be possible without the generosity of our volunteer community members of people like Jessica and Tom and Carissa. So these three speakers really embody this pro bono ethic of kindness and service. And so I just want to start us off with a really massive thank you for not only joining us today and sharing your time with us, but also all the work that you've done for our nonprofit and our partners up until this point. Opportunity. Oh, of course. And so with all of that said, I want to start with a rapid fire question for each of our three panelists today. If you had to describe the act of doing pro bono, the act of donating your skills to a nonprofit and just one word or phrase, what would that be? Jessica, do you Mind if I start with you?

09:12:11

Sure. Fulfilling.

**Kimberly Swartz** 09:12:14

Love it. Karissa, what about you? purpose? Purpose? So true, Tom, what about from your passion for helping? That's three words. Passion. Ah, I did save race, I think it counts. And I love for folks, I know we've got people on the line who have given back your skills based volunteering themselves through your own word or phrase into the chat AS well. We'd love to hear your perspective on it. But now I want to go a little bit deeper with our panelists. So I want to hear about a particularly impactful project or engagement that you completed with a nonprofits. Tell me about what you gained from it. Tell me about what the nonprofit gained from it. I want to hear that the whole experience. And Tom, I hope you don't mind if I start with you this time,

09:13:08

no, and I'm gonna break the rules again and give you two. Because one is, it's a not nonprofit that rebranded itself, it began is home again, VR, and it rebranded itself to acquaint over the course of the engagement. And it's a neat concept that they are really trying to promote a connection among diverse humans around the world to try and break down barriers for communication. What I gained from it, I was I worked with tremendously thought provoking committed leaders and volunteers, I got to interview all of these people to help them identify their vision, mission and values. And hopefully, what I gave them was an outsider perspective on how they're volunteers. And they're the people they were helping were viewing the work they did that helped them refine their communications. The other thing that I really enjoy doing, and I've done this a couple of times, is the 30 Minute speed consulting engagements. I, I just find that tremendously rewarding. And it's a great opportunity to get some questions answered for the nonprofits who aren't sure how to even get started in this. And I think you can cover a lot in one of these speed dating events. So I've really enjoyed. I've enjoyed every project I've worked on, but acquaint is, it's the one where I feel like I've was able to help them the most. And then the speed consulting. I personally love and I think the nonprofits benefit from it AS well.

**Kimberly Swartz** 09:14:53

Yeah. No, thank you so much for sharing both of those. And I'm glad that you called out the event option too, because we actually do have some opportunities coming up. I want to flag to folks on the line. And I know, Karissa in particular has a ton of experience participating in those events. And so Chris, I would love to give the mic to you next and and hear your perspective on the same question.

09:15:16

Sure, absolutely. And, you know, like what Tom said, It is phenomenal how impactful we can be, even in a one day event, 911 Day of Service, I highly encourage anyone who has not participated in that to do so. And you know, I think Kimberly, there are so many examples of nonprofits that I've worked with over the years, AS you know, but two that really stand out were from an event that you and I worked alongside one another and just for the benefit of the room, my volunteer partner needed to deal with a family matter that day. So Kimberly, stepped in and just, you know, agreed to be my partner for the day, we developed recommendations for to nonprofits, one that was local, here in New York, working with women survivors of human trafficking, I was absolutely blown away at some of the examples that were shared with Kimberly and I in that brief session, and that this was something that even within our communities, right around us, is happening. And that we also worked with an organization that does international work for humanitarian aid. This was all in a single 911 Day of Service. And not only was it incredibly impactful for me, I shared things with Kimberly and the room about some of my own experiences with homelessness, that I've never shared with anyone before and in working with that nonprofit. Being able to provide them with recommendations and then also follow ups in terms of their social media. media opportunities, we, you know, the feedback we received is that it was helpful. And it just, I can't overemphasize the positive impact. So whether you do a taproot plus solo engagement, or whether you sign up for an event, and do a speed consulting, they're incredibly rewarding experiences.

**Kimberly Swartz** 09:17:33

I really appreciate you, you diving deeper than just our second question the panel and sharing that I think I'm pro bono and partnering with nonprofits in this really deep way. It can get emotional, right? It can, these causes, these nonprofits are working on incredibly pressing and critical challenges impacting communities that we may live in communities that may be across the globe from us. And it does get to feel very personal. And it allows you to feel connected to people and communities that you may never have expected before. So be prepared for that for sure. And Jessica, I'm sure you've had similar experiences of really diving in deep with organizations that you've worked with, through taproot and and otherwise, so we'd love to hear your perspective on this question AS well.

09:18:33

Yeah, and AS you actually mentioned, was that like this year, I've been really much more involved than in previous years. So I'm fairly new actually to the taproot volunteering taproot plus, but I really wanted to dive in and kind of do a bunch of different things, I had some time and was able to actually do that. And to your point about going to a place that maybe I wasn't experienced, or didn't have a necessarily like, reason to be there in the first place. So one of the things was, I didn't even know what Giving Tuesday was, which apparently was blasphemy. Like, I have no idea what given Tuesday is, but I did work on a GivingTuesday campaign this year, with Patrick Kids Foundation, this was a foundation that focuses on education in Haiti, and educating scholars, AS they grow up with not just the typical, like, you know, school education, but also internships, and, and training opportunities.

So to me, I was like, Oh, this, this sounds like a great idea. But I didn't have like a lot of heart for it, I have no connection there. But to be honest with you, I feel connected after. So when I was saying the word fulfillment is that you can come in with just a set of skills, like I know what I'm skilled at, but I don't know where it could be used. And in my mind, I was like, I'm open to anything. And this was an opportunity that I took on with my skills, but then felt now connected. And now I'm like, close, and I still even talk to them, they'll they'll reach out to me for a little bit of like consulting advice, and I'm happy to schedule like that hour or two, to just sit down with them and solve a problem. So I guess the biggest thing that I have learned in the past year for the volunteering that in the pro bono work that I've done is that you don't necessarily have to have a passion for a certain nonprofit, it's certainly wonderful and great, but your skills are attainable anywhere, and useful at many different places. So don't limit yourself to just a, a cause that you may or may not be, you know, like that you may be really excited about because you might open yourself up to a whole new cause that you might be excited about later. So that was like something that I learned.

**Kimberly Swartz** 09:20:53

I love that. And I love that you're opening the door to this idea that the exchange doesn't just end with you donating skills are experienced the nonprofit, but there's an equal and opposite reaction AS well, right, where you are learning so much from the nonprofit organization that you're working with, AS well. And so it's tremendous value exchange from both sides. Jessica, you also touched on this idea of like transferable skills. So thinking you're really really good at this one thing and you you know, you're you're confident about them about this one skill of yours. And I know many of the folks are coming in from the corporate space and might not have experience working in the nonprofit space yet. And so we'd be curious to hear from all of our panelists. Have you noticed any differences in doing marketing for a company or for a for profit, versus doing marketing for nonprofits? Because I know that's all advice that folks on the line would really appreciate learning from. So Jessica, I might reverse order this time. If you don't mind me putting you on the spot first.

09:22:07

I keep telling you that you Get a lot more love and gratitude from a nonprofit organization, um, you, I guess, again, it goes back to that word fulfilled like it fulfilled on one side. I personally, you know, in my mind, you get fulfilled in your own heart, your own altruistic nature, but then also, you're fulfilling some, like a need for some for somebody else for another organization, for an organization that's actually leading to a whole nother set of people. So even though like I come from a corporate marketing side of things, you know, marketing plenty of brands and, and pharmaceutical drugs to everybody. And, you know, AS much AS we AS marketers try to truly believe in our product, we're always sort of answering to the man and answering to the higher order, while here you're answering for yourself, and not only you're answering for yourself, you are helping other people in the process. So I think again, it goes back to being fulfilled, like you're, you're a lot more, you got a lot more love.

**Kimberly Swartz** 09:23:20

Yeah, Chris, I heard a lot of laughter. And I saw a lot of head nods from your end. So I know you'll have a good response here AS well.

09:23:28

Absolutely. It's so true. I mean, this sense of purpose, right? I mean, so many nonprofits are operating on very, very constrained resources, AS we all know. And so the what I have experienced is much more room for creativity. And I am forever humbled and inspired by the resourcefulness of nonprofit leaders, and in a consulting role with him bringing marketing skills, and bringing all of the knowledge of my 30 plus year career, the opportunity to get think completely outside of the box in order to come up with solutions that are readily, you know, AS Jessica said, that are very often readily accepted. And literally, the nonprofits are just looking wait looking for ways to implement your suggestions. One of the other events that I participated in was with an organization based in Florida, that provides empowerment for girls. And we needed to do a design session that typically would have been done in person. But this was during the pandemic. And just what we were able to accomplish in terms, AS you know, on during the session, because I collaborated with other volunteers and what we were able to accomplish, virtually in terms of redesigning the space, that the executive director was absolutely thrilled with the plan that we came up with, and commented and followed up afterward that she planned to implement it. So I think that that room for creativity is there. And absolutely the gratitude and being able to see the results, the results of your work is is a real positive part of the taproot experience. Yeah,

**Kimberly Swartz** 09:25:12

I think the the room for creative creativity is a really strong point for all of us to keep in minds. And oftentimes, there's not a box you're being put into, you get to explore alongside the leaders of an organization and collectively come to an idea or come to a plan together, which is maybe not an experience that you always get to have in your corporate day job. But Tom, really curious to hear from your end.

09:25:43

Everything, Teresa and Jessica said, nonprofits are so much willing to accept help and to be open to what you have to suggest and say. And that is not such a nice contrast to when you've been in a an agency client relationship. And it's almost like you're butting heads, you're never butting heads and in the pro bono world, and it's very fulfilling.

**Kimberly Swartz** 09:26:12

So I want to quickly jump, we had a really good questions submitted ahead of this event, and from someone that I see is on the line today, so I want to make sure we have time for it. We had someone ask, they're newer to their career, and they're looking to help beef up their resume or beef up their LinkedIn portfolio with recommendations from pro bono partners. So I'm curious. I mean, any I'll take a hands up from any of our panelists, if they want to jump in and address this, like how can you encourage these recommendations Tom?

09:26:52

Ask, connect with it. I'm a huge proponent of LinkedIn, connect with everybody on LinkedIn. And when you engage in a project, and the folks want to know what can we do to help you because you've helped us let them know I would love to have a recommendation for it from you. And if you're in more Could you go ahead and write the recommendation for them, and let them edit the recommendation. So it takes the work out of it for them. And that way you get a recommendation on your profile?

**Kimberly Swartz** 09:27:19

Yeah, I love that be clear and directive about what you're looking to get from the pro bono partnership. That's perfect. Jessica, I heard that you've stayed in contact with some of your pro bono partners AS well. So I'm wondering if this has come up for you.

09:27:36

So I think it's also about addressing your own brand. So it's not just about asking them, but you proactively putting it on your profile. I don't think that there's anything wrong with saying, like, I worked on this project, and this was this was the result. I think that that's important, you know, you did something so acknowledge it for yourself. So I think that that, like not just asking for that recommendation, but also like, promoting it yourself? And is the question about how to get more of the, like the resume bolstering or is it because the other thing is, too, I think it's important to also think about what you where you want to go with the skills that you have. So if you're, you're gonna throw yourself out there and just be like, Okay, I'm going to try this, I'm going to try this. I'm gonna try this. Once you've kind of honed in on what you think you're not only good at, but also like, what, what skill set you want to highlight on your resume, then look for opportunities to to actually engage on those skill sets. So I think it's important to be poignant with what you're good at and at and actually adding to your skill set in a tangible way.

**Kimberly Swartz** 09:28:55

Yeah, I love that advice. And I will say, just through taproot plus alone and tap Roots, probably not the only place that you all are looking for volunteer opportunities. But just through tapper plus alone, there are 400 Plus volunteer opportunities listed and they are updated daily. So there's no shortage of opportunities to get involved and donate your skills. So to Jessica's point, be intentional about where you're donating and where you're looking to stretch and flex and, and develop new experiences AS well. Chris, I saw you unmute jump in.

09:29:32

Sure. Yes, I would say, you know, with every project that I've worked on, it's listed on my LinkedIn profile. And what's been great about it is that I've developed lifelong friendships, maintain connections, not only with the non partners, but also with other taproot volunteers. And we're literally this little tribe that, you know, we help one another out with advice, and, you know, tips and job leads. And so when you actually participate if you participate in an event in particular, I think the last two that I did, they were both sponsored by Disney. And there were multiple creators that participated. And we're, it's right there on my LinkedIn profile and include your your partner's include, you know, get their permission and include them. And, you know, that's something that that I've found to be very valuable AS well.

**Kimberly Swartz** 09:30:24

But still, I saw you on mute yourself. Does that mean you have a question you want to jump in with?

09:30:30

You'll have a comment? Yes, please. Okay. I think first of all, I really appreciate everything that has been stated so far by Jessica, by Tom and by Carissa. But I wanted to also add, because I have probably 25 plus years experience AS a communication and corporate speech specialist. And I think the term that I haven't heard yet, but I think that Jessica, Tom and Carissa role discussing is networking. And I think it's so important to network effectively. Many people do network, but they don't know exactly how to do it. And I think it's by being bold. And by asking, I did hear that mentioned, I do think it's important to ask I'm on LinkedIn, probably at least daily. And one of the ways that I get testimonials is I ask former clients or existing clients for them. And if they don't want to do them, they don't have to. So that's one opportunity. There's so many ways of networking. And I think that that really helps to promote yourself whether you're doing pro bono or not.

**Kimberly Swartz** 09:31:39

Yeah. 100% I think one of the taproot, one of our golden rules of pro bono consulting is treat this like you would a paid engagement. Right? So you would list a paid engagement on your resume, just like Dale was sharing, and just like Jessica said, you would also do other things to ensure quality and so I want to pivot a little bit back to another question we have around managing In these types of engagements, so managing the relationship, the partnership with your nonprofit client, because pro bono project management and expectation setting, communications planning all that jazz is a tripping point, that taproot commonly see is for our nonprofit and volunteer partners. And so we'd love to get your all's expert take on kind of how you've navigated pro bono project management in the past. Jessica, do you mind if I start with you?

09:32:41

Yeah, absolutely. So I think that personally, I love doing a little bit of project management, taking a step back, mapping out those steps. But I think it's important to first and foremost find out from whatever work you're doing is know the objective, know the end goal. So you can create those steps to get to that end goal. And sometimes this is a like, for some people, it could be okay, you gave me your end goal. I'm gonna go and like think on it, and I'm going to come back to you. But sometimes it is sort of a, it's a, it's a collaborative effort, where you might need to schedule meetings. So for this Giving Tuesday event that we were doing, we had a lot of different players in it, and somebody just needs to step up and take it on and be the project manager on it. If it's not you, it could be somebody else, but at least you. It's about keeping it going.

And it could switch roles at times, depending on how the group is, but it's about addressing the objective and then mapping out those steps to that objective, and then setting the expectation AS to Okay, so this step is going to take this long, this step is going to take this long, so it's an easy way to kind of create, like, I'm a spreadsheet nerd. So I love like putting everything into a spreadsheet and pretending that I am project managing. But in reality, it's it's being open and honest. Knowing what what it takes to get to that objective, and also not over promising. So obviously, if, you know if they have like this grandiose we want, we want to do this big thing. Sure, we can do that. But let's be honest, here it we only have a month to do it. And we're probably only gonna get through a week, a week of what you really want to do. So open and honest conversations and mapping things out with an end goal in mind.

**Kimberly Swartz** 09:34:32

I love that. So I'm hearing work together to create smart, specific, measurable, actionable, realistic and time bound goals right at the outset. So you know where you're going, Chris, I saw you raise your hand earlier, and I missed you. So we'd love to hear from you. Next,

09:34:47

no problem. And with every single engagement, again, whether it's your solo consulting, whether you're collaborating with someone, this something AS simple AS setting clear communication expectations upfront. What day of week, are we going to be? What form? What channel of communication? Will we use? Do we prefer email? Do we prefer slack do Weaver every single engagement that I've worked on, we would take 15 to 20 minutes at the outset with some of that tactical planning that would just immensely help momentum. And then of course, being very, very mindful of scope creep. So you know, like Jessica said, been setting those real clear expectations up front, and managing to that. And we would actually produce a one to two page document during our Discovery sessions, which was, you know, when we would conduct open ended, interviews and et cetera, and I don't want to jump ahead in the agenda, but managing those expectations up front, and specifically setting how you will communicate and what channels and when will save you lots of heartache. Yeah,

**Kimberly Swartz** 09:35:57

Tom, I saw some pretty big head nods during the scope creep portion specifically. So I know your thoughts there.

09:36:07

And I think this may address another question you've you've got what I had what I was thinking, be very clear about what you want to accomplish with the consultant. And what, what is the ideal help that the consultant is going to provide? And if you haven't thought about that, that's something I tried to narrow in on in the initial conversation, to understand what your expectations are to ensure I can meet them and in what time period and I also think taproot provides some good guidelines for us to follow. And I find them to be very helpful.

**Kimberly Swartz** 09:36:49

Yeah, use those tools. Every every person who gets matched on a pro bono projects or taproot is going to get some some really helpful documents, so use those. And use Tommy started to touch on a question that we actually had submitted by someone this morning. And it was from a nonprofit A professional, and they are new to working with pro bono consultants. So they're new to this world. And they are wondering if we can share advice on crafting the project description that's going to pull volunteers in. So what do you three need to see in a volunteer request on taproot or through other volunteers and boards? What do you want to see from the nonprofit? That's gonna get you interested in saying, oh, yeah, I could donate that I can fulfill that successfully for them. Tom, I'm gonna go to you first, because you already started touching on this,

09:37:51

right? I really want to know. And if they don't put this in their, their brief to tap root, it's going to be the first question I asked him, What's your story? And what are you? Why are you doing this? And unlike Jessica, I look for projects in which I can feel an emotional connection, because I know if I have an emotional connection, I'm going to be more committed to helping them be successful. And so how are you going to get me emotionally committed to your project, and it's not that hard to do, I want to help people. But help me understand what the message is you're telling. And then one of the things I'm going to work with you on is refining that message so that it translates across different communications channels, and is easily communicated by you by the members of your organization and by your volunteers. Because one of the things I'm I'm a big proponent of is engaging your volunteers to help tell tell your story and give you a bigger microphone.

**Kimberly Swartz** 09:38:59

Yeah. 100% Jessica Theresa, either of you want to jump in,

09:39:05

I want to rebuttal.

**Kimberly Swartz** 09:39:08

do is I hate to say it,

09:39:10

I'm actually on the other side of it. In my mind, I'm thinking that things that are important for me is I know what skill set I have. So I'm not going to going to try to do something that I don't necessarily know at all how to do, I might stretch myself a little bit, you know, you have like the range. But I also would love to know, you know, how long is this going? How what's the time commitment. So if I know I have like x skill set, I want to know that I can dedicate 10 hours a week for for this, and this is what I'm able to do. So being a little bit more detailed with the time commitment. You know, any nonprofit I'm down for it, though.

**Kimberly Swartz** 09:39:53

I love that curry. So what about you?

09:39:56

You know, I will add that the the materials that taproot provides to nonprofits are so incredibly helpful, that when I read a brief, you know, similar to Tom, I've generally always found that the briefs contain the information that I need to pique my interest in terms of whether or not I can be an effective consultant. I will say that, upon first talking with the nonprofit, one of the first things that I asked for during discovery that's very, very helpful is having a real clear list of the stakeholders. So that is, you know, staff members, that's donors, that's any partners, governmental organizations, and absolutely their constituents, or community members. And so getting a really nice mix, from the nonprofit leadership of those individuals to speak to, and that can sometimes in some cases, nonprofits have had that at the ready. In other cases, they've had to gather it. But that's absolutely critical, because it does help to, AS Tom was saying, it helps to tell the story and get the why and hear the different perspectives that will really help you AS you begin to work on the project.

**Kimberly Swartz** 09:41:17

Yeah, I'm really glad that you mentioned that, and kind of underlines Tom's earlier point of, like, why are you doing this in the first place? Why do you want me to do this project for you? Because sometimes there is going to be a bit of like root cause analysis work that you AS the volunteer are going to be doing with the nonprofit, especially in the marketing realm, like figuring out do they have an answer to why they want to use Facebook and Twitter AS opposed to Instagram and LinkedIn. It might just be because that's what they're personally more familiar with. But they haven't actually thought through if that's the best channel for marketing to their core stakeholder and they need your expert like pushback to get them to the right place there. I also think, Jesse, I really appreciate you pushing back and saying, well actually, that's not what I'm looking for, because I think that it It speaks to like a fundamental truth here that we're all individual people, we are all going to be motivated by different things. And at the end of the day, like volunteering is just all about, you know, your own personal motivations, and might be resume building and might be a connection to the cause, and might be, oh, I simply like have the time per week to knock this successfully out.

And any of those reasons, all of those reasons, are perfectly acceptable reasons to get involved with pro bono consulting. So I have more questions, I can keep it going. But I also want to invite other folks here on the line, if you have a question, use the zoom raise hand feature, you should be able to find that through the reactions button on your bottom bar. So if you want to jump in with a question for our panelists use that feature. Or if you can drop it into the chat or the q&a, we can continue taking questions that way. So AS folks use Zoom, to let us know if they have questions, I'm going to ask the next one on my list, which is, how could nonprofits better prepare to work with you successfully? So I've heard mention of this in our previous question around, they need to have thought of who their core stakeholders are. Right? That's a form of nonprofit preparedness. How else can nonprofits prepare successfully? And how can you encourage that? Preparedness? Right, what are some steps you've taken to get them to that right, that point before? And then after that question, Randy, we're gonna jump to yours. Karissa, do you have any thoughts here?

09:43:57

Sure, you know, prior to beginning any engagement, there is preparation time, both on the part of the volunteer, and on the nonprofit. I, you know, in my experience, taproot has facilitated that extremely well. So when I think back I've worked on, gosh, probably 12 to 15 different engagements over the years. And in each instance, the nonprofit received guidance from taproot about what they needed to have ready for us for our first sets of meetings. I would say that very, again, very early on with that just making sure that they do in fact, come prepared to those initial meetings. There was one organization that we worked within it was a speed event, where the person who was going to provide the information was not able to attend. And there was a little bit of reshuffling, but you know, they were able to step up and keep it going. So I would just say that the materials leverage the tools that taproot provides, and if you have questions before the engagement actually starts to reach out to taproot and just make sure that the nonprofit is also using the tools the taproot provides. I hope that helps.

**Kimberly Swartz** 09:45:33

Oh, yes. And I think what you just said, reach out to taproot if you have questions was probably music to Meghan's ears because she is one of the great people who sits behind the taproot Help Desk and we want to hear your questions. We want to be able to step in and assist, but we don't know what we don't know. Right. So we've got to hear from you first. And so and it's also important to note that a lot of creases experience comes from taproot events and really facilitated programming. Whereas, Tom and Jessica, I know you both have engaged through some of just that a little bit more hands off them taproot offerings, like a taproot plus project. So we'd love to hear your perspective on this because it might be a little bit different. Yeah, so I've,

09:46:20

I've actually think I've only done taproot plus. And I think it goes back to that I completely agree with Tres, is that you need like that, sit down session, the discovery phase, the planning to be successful. Otherwise, you're kind of flying the plane AS you're building it. I think that's the phrase, and that never turns it doesn't turn out great. So to be successful, it's about being transparent and always remembering. So you're not in a corporate environment. You're not having a boss telling you to do X, Y and Z. Like this is a partnership like this is somebody who truly does need your help and you have the skill set to do it. So being comfortable and honest and talking with them in a way that is it's allotting that sort of transparent goals and what asking the right questions like, what are their goals? And how do you help facilitate them? So I hope, I hope that sort of answers it. Because a lot of times, again, it goes back to if you know, your skill set, you know, where you can play and figure out how your skill set will, you know, enable this project to move forward?

**Kimberly Swartz** 09:47:34

Yeah, I think a part of that is the transparency to say, well, because I know my skill set. And because I know this area, I'm going to say no to this part of what you're considering, because I'm not going to be the best fit for that. And I can focus on these elements instead. But Tom, would love to hear if you have any additional thoughts on that.

09:47:56

I've got a bunch of steps I go through, after the initial call. I frequently recommend people getting a copy of zilch the power of zero by Nancy Lublin, because it talks a lot about starting nonprofits, and what you can do with a limited budget, hence the zilch. And I really try to get down to the fundamentals of vision mission values, what's your story? How do you make an emotional connection? What kind of information of value are you? Are you sharing? Do you have? Or have you identified your promoters or your raving fans, and the importance of hiring for passion AS opposed to experience? So that's those are things I touch on early in the course of the of the engagement? And, and like Jessica, I've done a lot more of the individual consulting projects than the speed consulting projects, though I do enjoy both.

**Kimberly Swartz** 09:48:56

Yeah. Randy, I know I recognize your name. I know you're also an experienced taproot volunteer yourself. So I'm really curious about what your question or maybe it's just a comment to add to the discussion.

09:49:10

Yeah. You know, I come from the Stone Age, part of taproot, you know, where we, you know, we worked on long term team projects, going back, you know, 1012 years ago, and I really enjoy the collaboration part of it, you know, I come from, you know, kind of classic, you know, consumer advertising a lot of work to pharmaceutical and other stuff, you know, we're where people collaborate, you know, we love creativity. So obviously, the business has changed, obviously, taproot has changed with it. So I do enjoy the mirror, the pro bono marathons, and the speed consulting is, and part of the reason is, and, you know, just in time to kind of alluded to it is all about being comfortable with your skill set. You know, if I look on some of these, I think it actually might have been the Haiti site or something, you know, some of the things that they're looking with clients looking for, you know, are probably more involved in creative circle has. So, you know, it's kind of daunting, I guess you'd call it. So I'm, I'm always looking to, you know, to try to find a way to collaborate. And, and that's kind of why I do the the marathons. And but, you know, I've really enjoyed, you know, all the clients that, you know, disappointed. They're inspiring what they do the dearth of resources, though, from the client, it's really sad.

I mean, you know, you get involved and you do stuff. That's, that seems kind of exciting. I have a friend who's worked on Tappu projects in the graphic design side, you know, he'll present 12 different logos to them. And then let's say, Yeah, I don't know, if we got room for I got $200, you know, what can you do for me, you know, so on that side, it's kind of frustrating. But, you know, on the other side is, you see these organizations and you see the work they do, and you see how committed they are to doing that work, and you do want to help them. But so I don't know, I guess my question is this, I have two questions. One is someone whose skill set has kind of diminished and now it's, you know, leans more towards making gin and tonics in the morning. The, you know, it's, you know, what, Tappu projects aren't going to aren't gonna scare me away. Yeah. The other side is how do you how do you how do you get collaboration? I mean, if you wanted to do instead of just one person working, you know, if you had, like, you know, teams, you know, that could be assigned to work for clients would be, I'd be curious to know how that could happen.

**Kimberly Swartz** 09:51:35

Yeah. There's so many good things, so many good nuggets, and what you just shared and and also good questions, and I want to make sure that one of them doesn't get lost in the shuffle, which was this reflection that sometimes it is going to be frustrating and sad that the nonprofit won't have the resources to carry out a specific big idea, or like big beautiful thought that you've created for them. That's just the reality of a resource constrained organization and sometimes you will need to pare things down for the realities of that situation. And so that's definitely I encourage everyone to keep that in mind too, because that can be a bit of a reality check for volunteer. So I really appreciate Randy, you calling that out? I want to go to your question around opportunities to collaborate, because we actually do have a team based opportunity coming up.

It's actually being held during National Volunteer Week. It's called a scope Athan, which really means that you're diving in with a team of fellow consultants, with one nonprofit over the course of a four to five hour virtual day. And you're diving in on a really meaty challenge they're having maybe they're just having major brand awareness issues. Maybe they don't have any social channels established. And they're figuring out how do we create these, how do we launch them, etc. Maybe they're figuring out who their core stakeholders are and how to message to them appropriately. So over the course of the day, you're diving in, you're investigating that core marketing challenge for them. And then you're creating a scope of work that throughout the rest of 2023. This is how they can address this big challenge in pieces, whether that means additional pro bono work through through additional taproot plus projects or events, etc, or through pay contractors or paid staff members. So Megan, if you could do me a favor and put the link to that event. And we'll also include it in the follow up email to this panel, too, because we'd love for everyone here on the line to get involved in that scope upon AS a volunteer, that that's a great way to connect with a team of folks. And I'd also say, just because you sign up for a taproot plus project AS an individual volunteer, doesn't mean you have to do that project alone. So if you are at a company, and you want to pull teammates or team members into that project into completing that work with you, let's embrace that. We're completely fine with that. And, Randy, I'm going to reach out to you privately after the summit because I want to continue this conversation a bit or like how can we create more of these that won't hurt me connections for you? Oh, no hurt. Just I want more of your idea

09:54:43

for the scope of that already so

**Kimberly Swartz** 09:54:45

beautiful. And then I want to turn the mic back over to our panelists so they can respond to and address some other great ideas and other questions that Randy brought forth.

09:54:56

You know, actually I, you know, Randy, I two i I first joined taproot in 2008. So all of my initial engagements were the team engagements where we would have, you know, a copywriter, a designer, an analyst and account director, and so you know, what the prior prior model was. And what I've found with the transition to taproot plus is literally just what Kimberly said, there was an organization that reached out to me who we discussed the scope of work, similar to comments that Jessica has made, I knew what my strengths, you know, where my strengths were, and where I needed someone who was stronger in certain areas than I was. And the executive director was very open, and we discussed how we could bring in a second volunteer and collaborate on that together. So again, using all of the tools from the original taproot model, in terms of collaborating, we were able to apply that to the taproot plus situation in an effective way. So, yeah, that helps. Yeah,

09:56:06

there's actually a question in the chat that's like AS a new organization leader with limited nor nor budget, where should we start to get funding? I don't know if we were going to address that. But I sort of had an idea for MoDou. So just a thought here is that one way is to use tap root to find a Development Associate. There's lots of people who have development and funding skills, and actually can be tapped into that. So I would actually recommend creating like a brief or something just about how like you're trying to find funding in x area for for y project. And this way, you could actually find people who actually know development know how to gain funding, or it or go in the other direction. If you have at least a little bit of funding you do have an event and find somebody with like event planning skills and event and marketing skills to do some of that development and funding work too. So just wanted to make sure that wasn't looked over.

**Kimberly Swartz** 09:57:09

I appreciate that you're helping me moderate, which I always love. And I really appreciate that you pulled in the event planning skills AS well. Because for other nonprofit folks on the line, I know fundraising is going to be a pressing need for all of us. I'm a nonprofit, professional AS well and completely get it. Keep in mind that the taproot community of volunteers is primarily made up of folks from the corporate world, or who have worked in for profit institutions. So there's definitely a large pool of people who have business development experience and can help apply that bizdev strategy like how do you plan on building revenue streams for your organization that can help you prepare and build those out. But it's going to be a very competitive process to find people for like grant writing, because that is a very unique nonprofit skill set. And so our volunteer pool is a little smaller there. So get creative about how you lean on volunteers from the corporate world to assist with building the infrastructure of your fundraising. Marketing is a great example of that.

Right? I also know we have some CRM folks on the line to CRM, building out that customer relationship management system and how you're going to maintain connections with donors or build those connections. That's an amazing way to build your your fundraising capacity, building out your social media channels, another great way to build your individual donor capacity. So kind of stretch your mind into the other realms of tech in IT and marketing AS a way to continue bringing that fundraising support. All right, I know we only have two minutes left. And we always try really hard not to use up extra time on these events. So I'm gonna go ahead and try and wrap things up. That said, if the conversation doesn't have to end now. So in the follow up, we're going to include the LinkedIn profiles of each of our speakers. So we really encourage everyone please connect with one another. Build your own network, to Dales, great advice, great commentary that they shared earlier. And don't be afraid of reaching out to taproot. We want to hear from you. We want to help you. If you're a nonprofits trying to explore ways to connect with people like Jessica increase on Tom and more. Let us know let's chat if you're a volunteer who just hasn't found the right opportunity yet. We can also help with that. So let's continue this conversation offline. All right, so I just want to say thank you so much, to Jessica to Tom to crease that I learned so much from what you share today. And from the comments coming into the chat. It's clear that your perspective was really helpful for everyone else on the line too. So a really heartfelt thank you to you all.

10:00:08

Thank you. Thank

10:00:09

you. Thanks for the opportunity. We appreciate it.

**Kimberly Swartz** 10:00:13

Source is quite literally our pleasure to work with each of you. We love our community and and I'm really, really grateful for it. All right, I'm going to go ahead and close the room now. But you'll hear from us either later this afternoon or tomorrow morning with the follow up email with the recording and other helpful links. All right, bye, everyone. I hope you have a great rest of your day. Thank you. Bye