Taproot Panel How Has Pro Bono...ueled These StartUp Nonprofits

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So thank you, everyone. Thank you everyone for being here today. That reminds me we are recording this session. So if you are a registrant and you weren't able to actually make it into the actual time, hello AS well for you, for you out there watching it in the future. But I just want to welcome everyone today, thank you so much for for making the time to be here. I know a lot of you might be playing catch up after the Memorial Day weekend, the long weekend. So we know how valuable your time is. And if you're saying, Well, I didn't get a long weekend, we're we want to work to make a world where everyone gets to have a long Memorial Day weekend.

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So really, I just want to level set by kind of introducing why we're all here today. So over taproot Foundation's decades long existence, we've facilitated many pro bono projects between skilled volunteers and nonprofit leaders. That's kind of our bread and butter. It's what we do AS an organization. And our online marketplace. taproot plus helps nonprofits post needs and source one on one assistance with skilled professionals on a pro bono basis. And since the marketplace opened in 2014, we recognized a really high demand for pro bono service with still volunteers, from nonprofits in their startup phase, so to speak. So these are nonprofits with very small staffs. Maybe you know, it's two to five people, everyone's wearing multiple job titles. Sound familiar? Maybe most of the staff is a volunteer led organization, or you have maybe one full time person and a few full time equivalents.

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And oftentimes with much smaller budgets that are just getting started, or what we're seeing a lot now restarted in the the pandemic recovery economy, people that founded their nonprofits, and then had to kind of drop it for two years. And many nonprofits don't even know that pro bono resources or skilled volunteer resources for capacity building projects are even available to them when they're starting their nonprofits. So in keeping with our goal to be thought leaders in the world of skilled volunteering, we've assembled a team of nonprofit leaders who are here today who've used skilled volunteerism via taproot plus to grow their their organizations or, and they're going to share their experiences, experiences with you all in this in this space. So our hope is that you can take the insights these nonprofit leaders share with you directly into your own work, or potential work with skill volunteers, whether you're just starting from square one.

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And or even if you are someone who's done pro bono in the past and just want to hear about how other nonprofits have used pro bono support. Maybe it gives you some ideas to to tackle pro bono projects in a different way. So really, just by way of introduction, for me, my name is Josh. I'm the nonprofit Success Coach working specifically on our taproot plus team. You see here, the mission of the the Taproot Foundation up here, Taproot Foundation, is is is a large organization and we have many kinds of different departments and origins and things like that. We I work specifically with our online marketplace taproot plus. So I'm joined on the line today in the in the Zoom chat with another member of taproot staff, our, our, the fearless leader of our community engagement team, Senior Director Kim shorts, she's gonna be helping run run the event with us today. So Kim, I'll let you come off mute. And give a quick intro. Hi, everyone, I'm so excited to be in the same space with all of you today, I'm seeing some really good introductions come in in the chat, please, let's definitely keep those coming. We've got nonprofits who are signed up for this from across the United States and also some of the International regions that taproot works in AS well. So please tell us about the work you're doing. Tell us about the missions that you're serving. And we've also got folks on the line and people who are watching this recording back who are interested in giving back to organizations like yours, wonderful members of taproots volunteer community. And so the one thing that really binds you all together is that

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you're here and you're interested in giving, giving back to your communities and doing really, really impactful work day in day out. So I just love being in the same space with you and I'm really grateful for it. But I'm excited for the conversation. Josh is leading and Josh, I'll pass it back to you. Yeah, sure. So thank you, Kim for being here. So really just you could see some kind of high level kind of information here on the the right side of your screen about the

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At the Taproot Foundation,

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and again, our online platform taproot plus I think Kim is going to drop the link to taproot plus.org into the chat. So if you don't have a taproot Plus account, or one want to create one or just want to poke around on the site to see what it is and how it works, you can go there. And like Kim said, go ahead and introduce yourself in the in the chat, if you want to drop your, your LinkedIn or if you're with a nonprofit, go ahead and do that these can, these can be great networking spaces, AS well. So keep that in mind. So really quick run of show, we're gonna do a round of intros with our three panelists that we have here today. And then I'll ask each of them to spotlight a recent nonprofit project that they completed or are currently undertaking with skilled volunteers that the source through taproot plus and then we'll jump into like an actual discussion with the panelist. So we're also going to try and reserve space at the end for q&a from you all the attendees, where you can ask the panelists questions yourself. Or if you have questions for me, or you know, members of taproot staff will answer those AS well. You can drop questions into the q&a box, in your in your zoom interface, or in the chat. And Ken, Ken is going to also be on hand to answer basic questions. If you have some basic questions about taproot or taproot plus, in general, we might be able to just preempt those and go ahead and answer those in the comment section for you. But we'll leave some minutes at the end for for q&a. So we can hear from all of you. And we're going to send a follow up email with a recording of this presentation along with some information about how to get in touch with us. And we'll give you the LinkedIn information for our guests panelists, along with the websites for their organization and any open projects that they might actually have up on the marketplace fees. There might be people here today in on this zoom chat or watching in the future that might know someone or might be a person that can help on those projects. Yeah. So without further ado, I want to introduce everyone to our guest panelists. We have three people joining us today.

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And yeah, we're really excited to jump in. So I want to just start by by introducing everyone. So our first panelist here on the left going across to the right, sorry about that is kealan Wilson. He's a co founder and chief executive officer of a new approach, Inc, which is

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a new approach Inc. He's a servant, leader and international scholar. He graduated from the University of Texas at Austin, with a bachelor's in sociology and a minor in Spanish for medical professionals. And he studied in three other countries during his tenure at the University of Texas to become more multicultural and to forge a path for future young leaders coming from a similar background AS himself. kealan is a social entrepreneur and has found his place at a new approach to working out his fervor for mental health and civic engagement. He has many passions, but his greatest is progression towards fulfilling His purpose and helping others to do the same. So let us give a big warm welcome to kealan. I'm gonna let him come off, mute and introduce himself and kealan just take a few moments to tell us about your nonprofit and its mission and vision.

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Alright, sounds good. Thank you for having me. It's good to see you all here today. Again, I'm Keeling Wilson, co founder CEO of a new approach Incorporated. Our mission is to empower and equip black and brown youth and their families who have been impacted by the criminal justice system. We are growing to be a powerful Advocacy and Resource Center for the communities that we serve. And we we have we have many programs or things that we offer to our community members. A lot of it is through strategic partnerships and collaborations with other businesses or like minded organizations. AS of now our direct services are a feeding program, which we feed a section eight community complex, who is located in the food desert in our community every week. We also have a summer exposure program, and we have a mentoring program. That's a little bit about us. Yeah, awesome. Thank you so much for being here. Next up on our panel is Lauren cop sick. Lauren cop sick has an eclectic background that includes being the vice president includes a VP and banking, corporate marketing training and development caregiver, small business

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consulting call center management, volunteering and board membership. She also co founded the Richmond Virginia mix pediatric adult support group for the Crohn's and Colitis Foundation. In 2015, AS the mom to a kiddo with two rare diseases and one neuro divergent, Lauren realized nothing existed to teach her children or any other human how to navigate such a complicated health system. But she did. She had been navigating the education system since 2000. And added healthcare in 2006. She spent the next seven years researching, which became the genesis for her nonprofit that healthcare navigation project. So, Lauren, yeah, tell us tell us a little bit about your your nonprofit and your mission and vision. Thank you. And it's really nice to meet everybody here. And thank you again, for having me. Yes, you gave me a very nice introduction. I'm the founder of the healthcare navigation project. And like you said, Josh, in 2015, I realized that nothing existed to teach anybody how to navigate the healthcare system. And I wish I knew about you guys back then. But I didn't. So I spent seven years by myself trying to figure out how to bring this out to the world. And I ended up with five modules. We have basic health care, navigation, your mental health toolbox, let's talk pharmacy, specialty healthcare, and navigating hospitals and the future of health care. And right now we're working in a high school in Connecticut, we just finished a six month study, and they're looking to add us into their health education for this coming year. And we're really, really excited about it, we've been able to help a lot of our underserved youth

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and helping them to get to that next phase in their life where they're going to have to navigate everything by themselves. And it's, AS you know, very difficult to do.

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So we're there for them. And actually, for everyone else, because it turned out that in 2020,

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the CDC decided that the definition of health literacy, or healthy people for 2030 involves both people and organizations being able to actually use their health care, and to be able to make well informed decision. So we're here to educate everybody, and we're happy to be here. And I'll go back to you now. Thanks, Lauren. And then next up, we have rose beavers. Rose beavers is a passionate retired educator with hands on experience in the classroom to the district level. By being able to see the education system from a holistic perspective, she understands the importance of strong academic program, Rose heads the fundraising and sponsorship efforts of first gen success, and uses her educational background to support the Excellence Program and its core pillars. She is a first generation college student with a Bachelor's and Master's in Education. Being a community advocate for young people is very important to her and she commits to being a changemaker. Hi, Rose. Tell us a little bit about your nonprofit.

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Hello, Josh.

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Hello, everyone. I'm roll speed with sponsorship Board Chair of first gen success. And our mission is to empower young ladies of color to become first generation college students. We work with high school seniors, we pair them with a mentor to work with them throughout the school year, their senior year to help them with the application process, financial aid, and just helping them to stay grounded their senior year because at home, they don't have anyone to turn to they have them guide them through that process. We also have a programming module that we work with the students monthly we meet with the students to

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to encourage them and to empower them career and college readiness skills. We provide professional financial assistance through a scholarship. And we also want our scholars to be community leaders. So they are required to complete a community service project during their program here. And we're excited we're getting ready to graduate our third cohort this Saturday. And this will be our first in person because we launched right in this of COVID which was a challenge within itself. So we're really excited about our graduation on Saturday. And thank you Josh for this opportunity. Yeah, no problem. We're excited to help you. And if you're if you're just trickling in, go ahead and introduce yourself in the chat in the chat if you want drop your LinkedIn information or website to any organization you're

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affiliated with, say hi to us. But we're so so happy that we have our three panelists here to talk about being startup nonprofits and how skilled volunteerism plays into helping their organizations kind of build capacity in those early stages. So without, without further ado, I wanted to jump into what pro bono actually looks like for some of these organizations. So what we'll do is just go through each and talk each organization and just spotlight a recent project that was either completed or is currently being undertaken, with the help of a skilled volunteer source off of taproot plus, just to give everyone an idea of what it actually looks like and the type of work that can be achieved. So you'll see everyone has a few projects listed up here that they've either completed or are currently undertaking, we're not going to be able to get to go through every one with them. But we're going to highlight kind of the one right at the top. And they're going to let us know what the deliverable is the finished product and how it will make an impact or has made an impact.

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So kealan, if you want to talk about, you know, the the project, you want to spotlight the Google Ads optimization, tell us a little bit about that need, and how that project is going? Yes. So this comment came about, AS some of us may be familiar with you are a nonprofit organization, Google has a Google Ad grant that you can apply for. That gives you about $10,000,

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like a ceiling $10,000 ceiling for Google text ads. That's an amazing thing to get. But they don't offer much. When it comes to actually implementing it, it is a whole nother task. So I went to tap root asking for a project for this particular knee. And one thing that I did learn, and this is still an active project, one thing I did learn by going to a workshop, Josh had facilitated not too long ago, is just how to actually apply for or how to actually put the project on the market on the marketplace. So I was able to get a little more a little more strategic and

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specific with what I wanted. But one thing I learned is like when I actually got my volunteer, after having a further conversation with them on the scope of the project, it kind of shifted based off their recommendations and their expertise and skill set. So now it's like this project is not even just the creation of a Google ad for us. He bought into our organization's mission and wanted to help us

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and more ways, understanding we have, we have a lot of needs. So for example, he's helping us to come up with ways to secure sponsors, because that's part of his expertise AS well.

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So that's kind of something that's one of the biggest things I learned from this particular project is that once you pair up with your expert, they will they can, you know, shift the scope of the project based on for your needs and what they can deliver. For you. Yeah, yeah, kealan. That's really great insight there. And we'll dig into that a little bit later during the discussion portion. But yeah, that kind of helping partner with with volunteers and leaning on their skills and expertise, to inform kind of the shape of your own need, and under better understand your own need. And what a solution would actually look like is really, really important. It's one of the benefits of skill of volunteerism. So thank you for sharing that with us.

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So I want to also now move on to Lauren at the healthcare navigation project. And I don't think we actually were able to put every single opportunity that Lauren actually completed or is currently matched on up here but these are just some, but I want to invite Lauren on to talk about the program design project that she did with a skilled volunteer on top three plus. Thank you Josh. I think I was probably one of the first people that was able to speak with you Josh and I and I and I don't know if that's the reason why that you sprinkle more fairy dust on there, whatever. But I all I know is that since I spoke with you, everything has changed. I don't know if it's because I understood exactly what I was supposed to. Like Keelan say said like how I was supposed to phrase thing and what

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What I was looking for, because I didn't understand all the different positions. But right out of the gate, I was able to get Stacey Kay who like I love, and she has become our program designer, she has literally switched positions in the school system. So she has a little, little bit more time to work with us. And like Ilan said, She's totally bought into the mission. It turns out, she has English AS a second language, also behind her. And she does program designing for third to sixth grade, which most people would know is that that's the eight. That's what when you when you do any sort of a class, you're supposed to, you know, bring it down to that level. And that's what we're all supposed to be able to understand. So

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she has built all of those five modules with us. And I don't think I'm hoping she never leaves to be honest with you. So I can't thank you guys enough for that.

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Yeah, yeah, that's great to hear Lauren. And Lauren is also highlighting on something that is a is a really, really great byproduct of pro bono engagement, which is sometimes your skilled volunteer likes you enough, they stick around. We've had skilled volunteers jump on people's boards before.

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So you know, that's what we really shoot for. That's what we hope for, is that these opportunities kind of balloon out into permanent relationships or, or long term relationships. Am I allowed to say that part that we have an all volunteer working board? Pretty much almost everyone from tap root? I mean, I can't even tell you how wonderful it is to work with you guys. So anybody, I don't know how many people are on this call, but

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just love you guys. Thanks, Lauren.

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So I also want to touch on first gen success and the work that Rosa was able to do. Rose, I think you wanted to tell us a little bit about this multimedia project that you worked on. Yeah, give us a little more information about that. Yeah. And I want to just echo what Lauren just vision we all volunteer run work in Google. And also so we our bandwidth is very limited. Our first year we engaged in Giving Tuesday. Like I said, we launched right in the midst of COVID. And our revenue wasn't that much. So we said we needed to come up with a video marketing campaign. So I reached out to tout Roots, posted the project, and a professional

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videographer contacted us and we, we engage in the conversation very impressed. And honestly, I thought it was just gonna be just a simple little video for us to use during Giving Tuesday. But it turned out to be

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they went through the whole process of creating a video, which I did not know, it took about four to six week, but they first we had a discussion on what we want it did they provide suggestions. And then they created like a project.

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Deed detail like what step by step what we're going to do throughout this process. And throughout the process, they provide recommendations, they provide us guidelines, due dates when it needs to be done, when,

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in my opinion, I felt like I was a full paid customer. I mean, like if I had to pay for this service, I could even imagine what it would have cost. And we posted that video during I guess, given to the campaign and our revenue, our donations significantly increase. So we were very grateful for them. But I think it just not knowing what you're able to even get out of engaged in in a volunteer project. That's what I do for this first project. And I've had several projects on taboo, but you just never know the level and the quality of service that you will receive doing this project. And this one just kind of like standing out the most because it puts so much work and effort into it.

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Yeah, that's so awesome to hear. Rose, thank you for sharing that. Yeah, so we I just wanted to like I said, we can't go, we could sit here and just talk all day about every single project that you all are doing. And I know we'll probably maybe talk about some more in just a minute here. But that's just kind of a taste of what you know

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what the value add of pro bono and skilled volunteer support actually looks like at an organization especially when you're kind of just getting up off the ground.

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So they've already shared some really great insights. But now I want to kind of jump into just a more kind of free flowing just

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Question with with our panelists. And they might be able to tap into some information about other projects they're working on. But the first question, I'll just pose to kind of all three of you. And then, you know, whoever, whoever wants to jump in first can go. But I definitely be interested in hearing from you all. And this is actually a question that we got, AS part of registration from from people on the call today. And it's a great first question, which is, what do you wish you had known before jumping into this before starting a nonprofit? Or if you could go back in time? And tell yourself, do this? Don't do that? What would what would that look like? So that's our, that's our first question. And kealan, you came off mute first. So I can go ahead and jump into that. I wish I had known a lot of things. But one of the main things is how important planning is on me, I like to kind of go with the flow. I do set goals and things like that. But when it comes to a nonprofit, the level of planning, I don't at this point, I don't really think it can ever get

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to too much or too detail, you can plan too far ahead. So

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if I were to restart again, I would definitely plan more like I would have at least my next year, planned out before implementing anything. That's one of the biggest things for me. Yeah, Kailyn. That's a great insight that also relates to pro bono. Because planning is really, really, I think, important for securing pro bono work, being able to demonstrate that you've intentionally thought through your need, and tried to map it out is a really good way to demonstrate that you're serious and will be a really good partner for a skilled volunteer.

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So that that relates, I think directly to to pro bono AS well.

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Lauren rose, I'm interested to hear what you all think about this, too.

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Do you want me to go? You go all over? Okay. Well, there's there's a couple of things. The first thing was people were telling me over and over, you should call your alumni associations. So I don't know that means your high school, your college or what have you. But I fought that. And when I finally did call, although I found out my university didn't work with nonprofits, they were so helpful AS to show me different places I can call, which seven years ago, when I had started my research, I never I never I didn't know there was this big community out there of other people like myself, I guess, looking all for the same kinds of things. And I wish I had known about you know, people like you guys and, and that you could call it alumni. So there's all these people out there to help you. If you just knew to ask, I guess this is what what what I wish I knew. Yeah, that's a great insight. Because one of the one of the big pieces of the one of the recommendations I always give to nonprofits, especially when they're new is cast a really wide net.

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When when you're just starting out, especially with regard to pro bono, but, um, Rosie, I'm interested to hear what your what your item is what you wish you had known. Yeah, I'm not the founder. But in my position AS sponsorship board chair, the one thing that I wish I had know was the you will last nonprofit resources. And you don't know what you don't know, or reach out to the organization that does support and nonprofit organization

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to figure out the things that you need to get done to, to be effective to be strategic. And also don't take on too much. I mean, it's a lot to be done. But don't overstretch yourself. You need to take care of yourself, self care. And just do that, you know, it all work out.

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Yeah, Lauren, I was gonna say that. The other thing that I didn't realize was, and I've used taproot a lot for this is just getting brainstorm sessions with different people that you would think are leaders in and when you're looking at skilled volunteers, that's what they are. They've got all this information, like Rosie and kealan was saying, No, you don't even understand what they're what the possibilities are. But just to have just little tiny meetings with people to just get their input on things if I would have known that I could do that kind of thing that that that gets you so far in nonprofit.

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Another thing is also to reach out to other nonprofits that have a similar mission to yours, because they are the ones that build around a little bit longer.

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They can provide valuable resources in experience and share their experience.

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Yeah, Rose is touching on

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something that could actually even be a project, which is like a competitor collaborator analysis. So finding out getting getting a consultant to help you map out what your environment looks like, who, whose competitors, whose collaborators, who could we potentially tap for future partnerships. That's, that's even a pro bono project right there. But everyone, I think, has touched on something really, really important, which is the importance of leaning on the skilled volunteer who's interested in working with you to ask them about, you know, the need itself, and if you completely actually understand what the need is, because they're the ones who are kind of the experts. So when you're going into taproot plus, to post a project, it's really good to, you know, think about, I just want to get someone in the door that has the right skill set, but I want to leave it open to them. Not to be too prescriptive, necessarily, but leave the door open to see what they have to say, maybe there's an unknown variable or something like that, that you didn't consider. And I think everyone kind of touched on that is AS a kind of a best practice. Because ultimately, you're going to be partners pursuing the the need together, and you'll you'll agree on the final scope of work with each other together.

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There's one other thing I was gonna say that you have to understand, which I didn't realize, at first, that it's really a symbiotic relationship. When you are asking for, you know, somebody, if somebody's volunteering, there's a reason they're volunteering, just like you're asking for something for a reason. So I found that AS soon AS I was able to open up and ask, like, why, what they want, you know, like, when they saw the posting, what were they thinking, what was it they were thinking they'd like to do? Because because we're new at all this stuff? We think we kind of know what we're doing. But we really don't I mean, you know, so So you leave it open, and you find that there's the skill volunteer that starts talking about? Well, I really would like to do to do that. You know, you can leave it open for things like that, because you don't have any idea where that can grow to. So that's one thing I really learned.

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Yeah, that's a really great insight, Lauren.

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Yeah, I think all of that is really, really relevant, especially when you're you're just starting out, is being open to that feedback from the skilled volunteer. And what Lauren is also highlighting, there's really two different programmatic activities you can do on taproot Plus, you can post a request for engaging in a project, or you can post a request for what we call a session. So the session is just a one hour, we'll kind of one off consultative call, to kind of brainstorm or diagnose or troubleshoot. But AS Lauren was saying, sometimes those sessions with a skilled volunteer can actually turn into projects. So keep that in mind, you know, when you are when you're posting needs, that you also have those kind of one hour, like blocks of time that you could potentially have with a skilled volunteer available to you AS well. And they could they could turn it into something else.

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The other one of the other big questions I wanted to ask you is when you actually start getting into working with a skilled volunteer,

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what's there? Was there anything that surprised you about working with a skilled volunteer or that was unexpected that you think other nonprofits who are interested in doing this would would maybe need to know about or look out for?

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Okay, when you came up to you, so I'll let you go?

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Oh, one thing that was surprising was

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like, the willingness, the willingness of our volunteers to kind of do more than what we asked him to do or want to do want to do more communicating that or like, for example, the guy who we're working with for our Google ads, optimization, like I said earlier, he wants to help us get like sponsors, and things like that. But he's also been, even though he's, he's very busy himself. He sends me we're not able to meet probably about once a week at this point, but in the in between time, he'll still send me resources or a video or sop on how to do this particular thing that wasn't in the project scope, but he knows from our conversations, you know, what our needs are and how he can help. He has a lot of skills with just technology and AI and things like that. So he's given us a lot

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have, like tools that I now utilize.

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So that's that was surprising to me at first I'm thinking, originally I was thinking of volunteer would be very, you know, just project oriented, they're very, you know, straight to the point they, they probably want to do multiple volunteering roles maybe at one time, not sure.

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But it seems more of a, they become more committed to your actual organization's mission, and want to offer all that they can.

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Okay, it's similar experience. Also, you start off with a project and a volunteer.

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They are, they're so knowledgeable in their field, that they will offer assistance, or offer suggestions to help you get started with another project or even assists you in some way to help you meet your goals. So

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I've been surprised, not surprised, but the dedication and the commitment has been very rewarding.

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Wonderful.

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Lauren, is there something that surprised you, or unexpected?

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Well, look, just like they're saying, I had no clue. My I think my biggest surprise was, I think we spoke about a Josh was Tamar Cohen. And she came on for a one hour, just like, brainstorm about social media, and she came back, I don't even know what it would cost. But there's like, almost 30 pages of, it's just like idiot proof for me, you know, like, how Lauren could do social media, like a, b, c, d, and it goes on for months. And I just was, so I was just, I was just blown away, actually. And she's still like, it was just a project. And she was just supposed to be there for an hour, but she put it together. And then we ever need, you know, like, here and there. We have a question or whatever. She's always there to listen to us. And I I just, I can't thank you enough for that. And the other thing I will say I was surprised is that you're actually advertising for us if you think about it, because people are seeing the name of your nonprofit come up AS you're advertising these things. And I'll hear from and I don't know, if you guys have your, Oh, I saw your you know, it might come through in a private message on on LinkedIn, you know, I saw your posting on and I really was interested in your mission, you know, things like that, that you would never have ever, ever thought that would happen is happening. Because you're you're it's organically getting out there. I don't know if you guys seen that two rows and kealan.

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You definitely expand your network because you people will approach you via email or LinkedIn. And like, how did you find out about us, and then they will share that they you know, saw you here, here or there. So it does expand your network.

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That's one of I think that's one of the also the huge value adds of pro bono is it gives you access. If that one consultant has a very expansive network, then all of a sudden you have a foot in the door to dot consultants network, you know, I spoke with a nonprofit

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who came on to taproot plus and posted a project and they actually got linked up with, you know, someone you know, who had worked with like Amazon before, and they were like, This person is so well connected. And they were able to find me, they weren't able to do certain things for me, but they were able to find someone in their network, who is able to do something for me and send them my way. So it's like now you have an end sometimes into you know, a very high powered network of other professionals, and your nonprofit kind of gets around via word of mouth.

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But both everyone I think, touched on another thing that I like to highlight, which is sometimes people are a little skittish of doing skilled volunteerism, because they're like, well, it's volunteer work. I don't know if it's going to be high quality. But when you're thinking about pro bono and skilled volunteers in particular, the people that reach out in interest in a lot of cases, they're they're doing so because they're bought into your mission. They're motivated kind of by the cause the area and that motivator can be very powerful if you work in an issue area that has either affected them personally or that they feel very strongly about feel very passionately about.

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Someone actually might be willing to go more above and beyond for you than they would in like a for pay setting.

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Because the dividend that they're getting is, you know, providing them with kind of a meaningful work experience.

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And the other thing that I heard that really reflected is that, along with that, that feedback about opening up networks, that a lot of resources that nonprofits need access to databases and tools and tech platforms and things like that are very gate kept.

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In, you know, you either have to pay for them, or you know, it's a very steep learning curve or something like that, having a pro bono consultant, sometimes they have access, like, there, they might be a freelancer, and they've already paid for access to, you know, a certain database or something like that. And now all of a sudden, that's your in to, to, you know, I don't have to have this subscription because they can help me. So that's another benefit along kind of it's very similar to that networking part is, there are a ton of resources out there that nonprofits need to access to that are behind paywalls that, you know, might be invite only or whatever, pro bono is really, really great for those kinds of needs, AS well. So keep that in mind.

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And one of the other things I want to ask you all is,

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what, what kind of advice would you have about working with a skilled volunteer like, what are some best practices to make an engagement successful,

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either in the vetting process when you're searching for the kind of the perfect volunteer? So taproot taproot is going to try and get people up in front of you, but you all kind of get to make the final decision AS nonprofits about who you're going to work with. Um, so if it's about vetting people, or if it's about managing the project itself,

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may be something that was different from like a for pay consulting engagement, any insights about project management? And or maybe how pro bono projects are different? Or how sourcing for them might be different? Does anyone have any thoughts about that?

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I know we're only talking about really positive things. But I also want to point out that

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I've been ghosted after I've sent all my stuff out to people, because I'm so you know, oh, you really want you know, so you have to be careful, just like anything else. And I wouldn't just send all my stuff out right away, until you

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met with him a couple of times, maybe and understand. I don't know if I'm making myself

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saying this, right. But most people are just wonderful. But there's other people that may not be, you know, just like anything else, I guess, is what I'm saying. Right. And Lauren, you're touching on a something we kind of give to nonprofits is that best practice is,

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it's an extension of our golden rule of pro bono, which is treat every project like it was a for pay project.

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We highly recommend to nonprofits, if you have NDAs, or confidentiality agreements that you regularly use with, you know, people that work with you for pay, absolutely structure, your pro bono opportunity around those AS well use the same kind of standards he would for vetting anyone coming into the organization. So if you want examples of prior work, or even references,

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they should be willing to furnish all of that for you. And there shouldn't be any hesitancy there. And AS AS a AS an institution, taproot actually advocates those things AS a best practice to provide more structure and more accountability to to the actual engagement.

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And I noticed that after the fact, so that's what I was going to do. I was mentioning it now, because then then I noticed you have that it's all on their website, on their on your website, but I didn't realize that I would need to, you know, go there, let's say and, you know, I just think is, like you say best practices is to get in the habit of doing that just in general. From a business standpoint, probably.

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Yeah, thank you. To kind of add to that point, I'll make sure that when I first meet the volunteer, asking them, their why like in the conversation, why the organization resonate with them, you know, a lot of that answer can kind of give you a good amount of insight on kind of where their motives are and things like that, see if that aligns with where you all are AS an organization. Another thing I will say is just

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doing our best, AS early AS possible in the relationship to to like sit the day's ever going to meet kind of have a schedule on that regard. Now I do understand that

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Like the volunteers, were typically they're not just volunteering they have a lot of time, they have a very busy schedule with themselves. And us AS nonprofit leaders, we like we have a very busy schedule. So it's always it's been smoother one, at first or second time actually meeting, let's go ahead and, you know, plan ahead, AS far AS all the days and times, we're gonna meet for our six week period, or whatever we determined in our project scope. And that's helped, AS well. And even if we're not able to make those meetings, we both have an understanding that we'll communicate with each other via email, at the very least, we want to be able to make it but still here, here's still what I had and what I was going to, you know, bring to that meeting, whether it was a question or things like that. And a lot of times, we still, you know, we're able to still, they're able to still serve us

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through the email correspondence, if we're not able to meet that week or so. So

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those are, those are really great insights. Rose. Yeah, I think one of the things for me, because you do wear a lot of different hats is to make sure you have time to devote to the project, I have a couple of projects that are in draft form, and Josh is aware, but we have graduation, some other things coming on, I know I won't have the time to devote to that project and get the volunteer the time, and the information they need to implement. So make sure you have time to devote to the project. And also another thing is terror group does a really good job of regularly regularly checking in sending the email, how are things going? Do you need help? I have a couple of volunteers, not a couple of volunteers who are volunteers. Sometimes things just happen with people, it could be illness, family life or whatever, in

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a couple of emails or a long period of time, I haven't received response, I will click on the I need help, you know the person is responding. And then usually they resolve you're able to resolve the issue. But respond to that check in email. If you are encountering a problem, just that chat room know that you will have no problem contact and receiving information from your volunteer.

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Yeah, Rose, that's a great call out. So we do sin kind of those regular check ins. And if you respond to those directly, those will go to help at taproot plus.org, which is our kind of engagement team Help Desk where you can message them and kind of get any kind of question you might have answered. Their information will be a part of the follow up, we send you along with my email address AS well. But rose, you touched on something that I love having these events because nonprofits oftentimes relate our best practices through their own experience much better than we can, then we can say, right? But you're talking about your capacity for management, which is, which is really important. Because sometimes people get give us questions like, well, how many projects can I post, we're not overly prescriptive on how many projects you can post, we don't set an upward limit. But we do say your upper limit is whatever your capacity for for management is. And keeping in mind that

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sometimes a lot of nonprofits can underestimate significantly underestimate the amount of work, something will actually potentially take.

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And again, it is that factor of those unknown unknowns that maybe your expert that you team up with, you realize when you talk over the need, oh, this is more complicated than I than I initially thought it was going to be, or there's a lot more moving pieces. So you can kind of get out ahead of that by kind of acknowledging like, Okay, I think it's gonna take, you know, two months, but, you know, I don't know for sure, that's something to ask about, when you link up with someone and you're having kind of that initial contact is based on your kind of experience. How long do you think this is actually going to take and then you immediately start setting best practices for good project management,

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which is also what kealan was talking about. Going back to, I think his first comment about planning,

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which is, it's really, really important at the top of a project to map out the logistics of the project. I'll be I'll be completely frank with you, when projects derail or don't get finished or go awry. It's not because the person skill set is misaligned. Or they don't have the right skill set. It's because the basics kind of fall apart like communication. You know, lines of communication go warm. So you can get out ahead of that like Elan was saying by establishing communications preferences right at the top of the project. Are we going to email each other? Are we okay with texting Should we call if you're going to have meetings, try and get those on the calendar even if it's just a regular check in you know, at your your kickoff meeting, get out the scoping form that we send you and you know, map out

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The logistics, okay, we're going to meet bi weekly, even if it's just for five minutes to check in about the project that can just these are best practices to help you get in front of any challenges that might might come up and writing that down, it helps hold both parties accountable. So I'm so glad that that was kind of touched on organically AS part of the conversation here. I know we're kind of nearing the end. And I just want to make sure that we have enough time for any questions that come in q&a. But I do want to just ask the panelists, you know, any kind of final insights before we jump into the q&a, please like, let us know. Yeah, it's really quick. Another

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tip for applying for your projects or putting those projects out there. I will say to use the templates that taproot has, even if your project is not the exact of that template, they probably won't have everything. But if you use one of the templates, it could still, you know, come and guide you AS far AS what you may want to put in there the type of things like being very pointed with your ask, the templates can help out with that AS well. Yeah, kealan is highlighting something that I hadn't touched on yet. But when you go to the project submission form, we're kind of going to ask you three free answer questions. But at the top of that form, you'll actually see that we have some pre templated projects mapped out, there's about a dozen or so of our most kind of high level projects that are up on the are projects that can ask for the most. And so we provide you with some language right up at the top

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that you can use, and you can edit that language, you can lean on it, you can use what you like or don't like. But if you're if you're having if you want to kind of dip your toe in the water and don't know how to pose a need necessarily, you can go ahead and use one of those templates. And can I see you have your hand up? I have my hand up on behalf of one of our attendees who submitted a good question a little earlier on around, you know, she's just struggled putting together scopes for pro bono projects in the past. And so any suggestions from panelists or Josh yourself that can help with the actual crafting of those pro bono positions?

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I obviously have some ideas, but I want to see if anyone on our panel does first. Yeah, I have an idea towards it. So how it's been for me, I typically would would put my project from what I think we need, you know, and project application on the marketplace. But then I, I leave space to where I'm just very open and candid with my with the volunteers, letting them know I need help. You know what I mean? Like allow the volunteers to help you make that scope, I don't think we should have. I don't think that is even always possible for us to have a fully completed scope. prior to giving to that actual volunteer. That's, that can be done in the first meeting. Like get them to want to volunteer with you with your general ask. But then you are make that scope together is typically what has worked best for me.

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I have

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I'm really interested in those one hour sessions, I've used them a lot, just to get for grant writing, because I'm really we talked about this jacket. My My idea is we never have to write one but I don't know if I can get away with that, I don't know. But to ask for the one hour brainstorming sessions in the big picture with somebody that is really, that's their, you know, wheelhouse, that they can help you then dig down to where the different pieces that you might need are. That's what I found. And I find that

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I though you'll ask me, would you still like somebody else? And I always say yes, because I believe the more input you have, the better because, you know, we know what we're doing. But we don't know what we're doing at the same time. So the more you know, the more input you can get the better. So that's that's the way I work in

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I've also used the one hour consultation because sometimes you know what you want, but you don't know how to put it into words that kind of bring it all together. So I'm using one hour consultation to kind of brainstorm like, you know, this is my vision but I'm not sure exactly how to put it into words. So what I want and then they provide other alternatives account and help you get it together. You have to template doesn't work. The templates aren't you know, they're really useful. I've used them first I didn't use them. I didn't really

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Whether with templates, I was just like, oh, and they'll templates I started using those and they are awesome. But the templates doesn't work and sealing get a response, I will do the one hour consultation. Have you found I found a lot of the one hour consultations want to stay on? Like, I feel like some people don't want to commit to say three to six weeks or whatever. So they say, Oh, I'll do an hour, but then they really, they're not really sure if they want to do more than an hour. Have you talked to them? And they get excited about it. They they say Oh, well, what do you need? And next, you know, they're with you forever. I find that to be awesome. I've yeah, I've experienced that also learn and they will offer if anything that you need. We need more support. And the more feedback is like an open door conversation that one hour Converse one hour the call ends up being an open door conversation that kind of like goes on AS you need it. Yeah.

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Yeah, thank you so much, Kim, for for surfacing that question because I know there might be some people here who are like, Well, I tried, maybe I didn't, you know the project's been up, but it's it hasn't been successful at recruiting anyone. One thing I will say to that is, you can also schedule a call with I offer a certain number of one on ones every week to nonprofits who are interested in just having a one on one call. And so if you're just like really skittish about asking for a project for the first time, or want some extra pointers, or even just want to workshop language for a project need, we'll send out a follow up email, and you'll be able to get in touch with me there. And you'll be able to if you'd like get, you know, grab some time on my calendar, we can kind of sit down and I can kind of orient you and you know, if you have a need or something like that, we can try and kind of nail it down to get it a little more concrete, because consultants like details, and then you can you can have a kind of more solid ask when when you when you start to advertise for your project. So that's we have someone like me, that's part of what I do is, you know, if you just need help finding the words, or asking specific questions about how the process works a little more in depth, I'm here AS well. So, you know, follow up with me, send me an email or ask any question you'd like. And then we can kind of get something up on my calendar.

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But yeah, I want to make sure I don't miss any questions. So Kim, let me know if there's any other questions that came in, that we need to tackle.

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While we do that, I was gonna mention one of the things that I'm finding, and I don't know if you guys have AS well, because not that people are getting laid off, but some people are, and they're looking to switch industries or what they're doing. And so they're coming to us to get a portfolio, whatever it is that they're looking for. And so I'm finding, it's amazing, because you're getting really, really amazing help, because they're trying, you know, trying to use their skills in a different way, which is awesome, because you're getting to help them while they're helping you. Are you guys planning that too?

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Yeah, I experienced it with the last video, not the media project. But we did recently completed a marketing video and the and the young man is starting his own. He's a choreographer, and he's starting his own business, and he wants to, you know,

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help us to support our mission. And I same time, he's, you know, helping him to start his business and start his portfolio. So it's like a win win, you know, situation, and he provided awesome services also.

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Yeah, that's really cool.

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Well, I know, it looks like, it looks like we're at time here. And I could stay on with you all, and you know, talk about it forever. But like I said, everyone's recovering from the Memorial Day weekend. So we unfortunately have to end things. But um, the conversation definitely doesn't have to end here.

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Like I said, we're going to share information about all our panelists in the follow up email, if you want to follow up with them on LinkedIn and ask them a question there. And you'll also be able to get in touch with us here at taproot. If you want to, you know, schedule one of those one on ones with me to get more questions answered. Please, by all means, do that. So keep an eye out for that follow up email. And if you're like me, and you think of brilliant, brilliant questions at 2am, later, to ask, please feel free to send us a message. But I really, really, really want to thank Lauren kealan and rose for being here and sharing their experience. Like I said, we love the opportunity to bring nonprofits on to talk about their experience themselves, because they oftentimes say it much, much better than we do.

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And, and this is a great opportunity just to be inspired about all the wonderful work you're doing. So thank you everyone for making the time to be here.

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And thank you to our panelists. But with with that, I'll see you online hopefully.

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Bye, everyone. Thank you have a good day. Thanks.