Recording\_Volunteer Support fo... and Early Stage Organizations

Mon, Jul 24, 2023 15:45:24 • 1:06:50

**SUMMARY KEYWORDS**

nonprofits, taproot, organization, projects, volunteer, program, josh, resources, place, thinking, challenges, big, strategic planning, pro bono, great, board, questions, partner, support, messages

**SPEAKERS**

Kimberly Swartz

**Kimberly Swartz** 15:45:24

Um, thanks everyone for joining this taproot webinar. And if you're here for the event on volunteer support for startup and early stage, nonprofits, you are in the right place. So don't go anywhere. We have a really, really full agenda, lots of great content to get through today. And this has been a topic that our team the whole team at taproot has been super, super excited to dive more into. So we're really pumped for this event AS well. And it's great to see so many of you in the room. Lots of nonprofits from across the US. And it looks like some organizations based elsewhere AS well in some of the International areas that taproot does work in, which is amazing. Yes, Deborah, I see a question in the chat. Are you going to be sending out the recording after the webinar? Great logistical question. We are recording. And we'll be sharing the webinar recording with everyone who signed up for this event, AS well AS some other resources. And of course, links for how you can get involved in taproots community. We'll aim to share that with everyone too, by tomorrow afternoon at the latest. All right. So like I mentioned, we've got a lot of lot of really great content to get into. So I'm gonna go ahead and dive in. But please keep those chat introductions going. So AS you introduce yourself, taproot panelists are going to introduce ourselves AS well. My name is Kimberly Swartz, my pronouns are she her hers, and I am taproot, Senior Director of Community Engagement. And I'm based out of Charlotte, North Carolina. So I don't know if I noticed anyone else chime in from the Charlotte area. But please, if you're here in North Carolina, I'd love to connect with you. And Josh, why don't you introduce yourself?

15:47:20

Hi, everyone. I'm Josh. I am the nonprofit success coach here at taproot and I work specifically on our taproot plus team. I'm also going to be co leading this presentation with Kim. I am also based out of North Carolina, but I'm in the Raleigh Durham Chapel Hill area that we lovingly referred to AS the triangle.

**Kimberly Swartz** 15:47:43

Beautiful. And you may be thinking that oh, two North Carolinians is taproot based out of North Carolina. We are a national organization. So we actually are completely remote. Our staff members are located everywhere, we have Meghan Gillette, who's a member of our team who's going to be helping manage the chat today. And she's based out of Kalamazoo, Michigan. And we even have team members who are based in other countries. So we work all over the place that allows us to be really flexible and responsive to different community needs. So logistics notes, this is in webinar format. So attendees will be muted throughout today's presentation. But please continue using that chat box to communicate with us, you all are already doing an amazing job at that. And like I mentioned, Meghan is going to be covering the chat box throughout today's event and will answer questions throughout. Or if it's like a big meaty topic that, you know, many people could benefit from a more in depth answer to or explanation of, Megan's gonna share that with Josh and I. And we'll have a large question and answer portion at the end of this webinar. So we are recording this event, AS I mentioned, and we will share out that recording with all registrants along with the deck by tomorrow at the latest. So during today's event, we're going to be covering an introduction to taproot and why we're uniquely positioned to support startup and early stage nonprofit organizations. We're also going to talk through and this is going to be the bulk of the webinar, really, we're going to talk through common challenges that startups face and how projects with skilled volunteers that will match up and help to solve or at least alleviate that capacity or infrastructure needs. And then we'll touch on some tips for navigating taproots programs, and really just pro bono project management best practices that taproot has learned and distributed throughout our 20 plus years in this space. And then AS I mentioned, we are going to save time at the end for a question and answer portion. So please use that chat box, ask plenty of questions throughout. We really do want to hear from you. All right. So I mentioned that I wanted to give you all a little bit more information about who taproot is. Because I did notice AS we had folks registering for this event, we did have people indicate that they didn't have much information about art. nonprofit organization or the work that we do. So let's start right at the top, which is taproot was founded AS a nonprofit in 2001, with this knowledge that there's a massive resource gap present in a social sector, right? So we have organizations who may very well have the solutions to our world's most pressing social challenges, but they simply don't have the financial means or staff capacity to carry out those missions to their fullest extent. And so taproot is democratizing access to resources for nonprofits, regardless of their mission area, where they're located across the US, their budget size, or the years they've been in operations. And you can see our mission statement here on the slide. But I want to talk a little bit more about what this means for folks who are at the early stage of their nonprofit growth cycle. So AS I mentioned, taproot is here to get nonprofits, the business support they need, and we do it for free. So since the early 2000s, taproot has partnered with over 10,000 social change organizations, and 24,000 volunteers totaling around 300 million and donated professional services. So how do we do this, we forge hundreds of pro bono connections every week through taproot plus, which is our free to use volunteer and nonprofit matchmaking platform. In addition to our community led programming through taproot Plus, our nonprofit has partnered with over 100 fortune 500 companies through our advisory services practice, which brings talented corporate employee talent directly to our nonprofits across taproots network. So through the taproot plus platform, we've lowered all barriers to entry for organizations just starting out, or those who are looking to grow. And in fact, many of our most active program participants or organizations who were founded under five years ago, or who are completely volunteer led, so they might staff a working board, and might just be an executive director who is leading a grassroots effort across their community to solve a really critical effort or critical issue affecting their neighborhood or community members. And so just a few more stats around taproots work with this really unique population of nonprofit leaders. In a large scale survey effort we did towards the tail end of 2020. We found that 63% of taproots nonprofit respondents were under five full time employees. And this percentage rose when you looked at taproot program participants and survey respondents who identified AS working at a bipoc LED organization 69% of all of our nonprofit organizational respondents are at a budget size of a million dollars or less. And 100% of our volunteer organization, respondents indicated an annual budget size of under 250,000 a year. So we're talking about really small organizations who we've become very adept and accustomed to leading them through this process of not only strengthening their capacity and helping their staff members and their board members lean into the areas and the skill sets that they're really, really uniquely talented that but also building infrastructure for the very first time. And we also have experience working with our pro bono consultant community members in helping train them up and get them ready to consult with organizations who are at the startup or early stage of their development. So we understand that developing your 501 C three is a thrilling time. It's fueled by a whole lot of passion, and no small measure of adrenaline. But it can also feel a little isolating, throwing yourself into work sometimes without receiving much initial support or attention from companies or foundations, or maybe even board candidates or individual donors. And working with taproot volunteers is a pretty incredible way for emerging nonprofits to build infrastructure, and also develop the muscles of scoping out projects and managing external contractors. But more importantly, pro bono is an incredible way to infuse your startup organization with high quality resources in lieu of grant funding. Saying that early stage organizations are all too often barred from. And I think that's just a really important point just to acknowledge a name in this space. So AS we dig in, because Josh is about to lead us through some some really incredible examples of how pro bono solutions can pair up and help solve some of these common early stage organizational challenges and startup challenges. But before we get in there, we'd love your feedback on which type of volunteer support will your early stage nonprofit find most useful? Because AS we go throughout the event, we want to make sure that we're sharing information and examples that are most relevant for the people on the line. So yes, please. Okay. See, Christopher just answered fundraising, business development, and social media in the chat. I'm seeing a lot of marketing, a lot of business strategy, some board development needs, finance, and accounting and human resources. Great. Okay, I'm seeing a lot of a lot of marketing. So that seems to be a big one. All right, Josh, AS these AS these needs, continue to pour in, I'm gonna pass the mic over to you. And then let's be sure that throughout, we really lean into examples in these high need buckets. And we can talk about them more during the q&a portion AS well. But Josh, please take us away.

15:56:58

Yeah, hi, everyone. Good to meet you. Again, I know I think I recognize some names in here of people I have actually had the pleasure of talking to before. And I know many of you were probably in our panel event that we had recently where we heard from actual nonprofit startup organizations themselves, about how they use pro bono assistance to leverage at their organization, and were able to build a lot of capacity in kind of the startup phase, many of them were still in the startup phase, but had been able to benefit and grow. And get out of some of those challenges. Ken was kind of talking about of feeling a little alone in the world, getting a lot of nose. Not, you know what, what I hear from people most of the time is, I don't really know where to start. So I hope that was able to provide at least some inspiration that other nonprofits, startup organizations have done things with pro bono resources, and been able to build their organizations and achieve a lot of success in, you know, fundraising, but also HR, strategy, things like that. So AS Kim was saying, I just want to go over some basic common challenges that essentially every nonprofit faces when they when they start out. So basically, every nonprofit, no matter how big, they are, has to start somewhere, right? So the Red Cross was at one point, you know, basically, a startup, or the Human Rights Campaign was at one point, a startup, right. So every nonprofit, no matter how big, they might be, kind of starts from from square one. And we've seen kind of the most common challenges that a lot of nonprofits have. And we wanted to just give you some examples of those challenges. Many of those will probably resonate with you. And also give you examples of projects that you could potentially take to our online marketplace, tap root plus, to pitch to find one on one skill, volunteer support, to help you with those projects to build capacity at your organization's. So these projects we're proposing are some projects that can tackle those common challenges that startup nonprofits face, and that are good for nonprofits kind of in this beginning phase of their, their work. So I'll start by just kind of presenting, you know, common challenges, a challenge, and then talking through some of the projects that you could potentially use to address them. Many of these projects that you'll see listed here are actually templates that we've developed on our marketplace that you can use, so meaning will supply you with some language. If you're you're not really sure how to describe the need itself. When you get to that project request page on your account in taproot Plus, you'll see a drop down menu right at the top that shows you a list of templates that you can use. Many of these projects are on them on that list, not all of them, but I think you'll recognize many of them. So So keep that in mind when you get to the extra actual execution stage and think about making a pitch for pro bono services. So the first challenge that we want to dig into is impact measurement. So at a nascent stage at the beginning stage of a nonprofit, something that oftentimes isn't really thought about is impact measurement, what are the impacts of your programs, but also what is the impact of your marketing efforts and outreach, you need to collect AS much data AS possible about the work that you're already doing. Because that data is going to be very important for when you try to sell your organization or pitch your organization, you want some kind of mechanisms in place, even if they are just rudimentary to collect that data, you want to be able to backup what you're saying, with data when you walk into a potential pitch meeting, or are filling out a grant application, or something like that. Two projects that are very good to think about AS in a nascent nonprofit that's kind of just setting out. Or if you're like a lot of nonprofits, you've started right before the pandemic, and then are kind of restarting, which is a very, very common experience I'm seeing with nonprofits are these two non or are these two projects that have helped address impact measurement to a certain certain degree, the first one is optimizing your data collection practices. So maybe you have a program that you've piloted, that is very successful, you're getting great word of mouth, but you, you need to actually systematize how you're collecting that feedback, and organizing it so that it becomes presentable. That is an example of something that would be tackled in the optimization of a data collection practices project. We also have up here, one of my favorites, which is stakeholder research. So this can help you direct where that impact measurement data is actually going towards. So many of you have probably seen other nonprofits advertising data that they've collected on social media with like infographics or things like that, you know, so many of our participants in this program report, better outcomes in you know, XYZ or after school program help helps kids achieve better grades or something like that. And you're putting a number to that. But you want to make sure you're you're pitching that data to the right audiences, at any given time that you're speaking to people that your messaging is actually going to resonate with, or potentially appeal to, once you've hit them with data, then hit them up for an ask of some kind, whether it's in kind donations or donations itself, who should be who who should get your data basically, is something that could be answered in a stakeholder research project. So keep these two in mind when you're setting out and thinking about impact measurement at your organization. Another common challenge is, this is probably very, very resonant is brand awareness and credibility. If you're a new organization, simply put, not a lot of people know who you are, and what exactly you're doing this to be one of the hardest things to master is getting your name out there getting a reputation, getting awareness of your brand. And there's three projects that you could choose to embark on, that are going to help you get to that, you know, brand awareness and credibility goals that you might have. So one is pretty common, which is just creating a brand style guide. So maybe you've put together a color palette and a logo. And but you, you haven't necessarily organized it in a way that can be easily disseminated to everyone else at your organization. And give the guidelines and rules about how your logo is to be used, how your font is to be used, how your color palette is to be used, that can provide templates for things like email messages, signatures, PowerPoint presentations. Something I like to emphasize to all nonprofits is that Taproot Foundation is a nonprofit AS well. We experienced many of the same challenges that all nonprofits face. The reason why I'm bringing that up now with brand style guide is because we are right now in the midst of a rebranding effort ourselves. So if any one of you has seen any other Taproom content or presentations, you might notice that some of its in a different color palette than what you're seeing right now. So our own marketing team was able to compile a new brand style, guideline rules and rules and kind of rule book to let us know, okay, we're going to use this font here, this this graphic design here. And we're slowly kind of converting our a lot of our materials to that. Another great project is a communications plan. So maybe you're wondering, Okay, we have social media, we have a website,

16:05:45

we need to start figuring out where our one pagers and, you know, press releases and infographics and things like that we're going to go when we're going to time them, who we're going to get them in front of. So a communications plan can really help you figure that out. But also figure things out, like, you know, the timeline for any given marketing push you're going to be doing, which is very, very important for communications planning, someone who can you can partner with to think strategically about all of your communications efforts, and maybe develop some goals that you can work towards systematically, and in a strategic way. And then you can map those, those larger communication goals down to specific milestones and tasks and activities. So you like everything you want to try and be strategic with how your messaging is actually getting out there, and how you're actually speaking to people. The final one on this list is one of my personal favorites, which is key messages development. It's one of my personal favorites, because this one's oftentimes overlooked. When nonprofits are thinking about their brand awareness and credibility, but it's incredibly important to make sure that you have a set of key messages. And those key messages are uniform. And that everyone at your organization knows what those key messages are, and knows when to deploy those key messages depending on who they're talking to or where they're talking. So for example, at the very beginning of this presentation, we have a slide that says, taproot empowers mission driven organizations, by mobilizing skilled volunteers to advance resource equity. That's an example of a key message. And we develop that key message over time. It's just one sentence. So it appears very simple. But you realize very quickly that the actual messages you put together can take some time to actually put together you're going to want to assess data about who you're appealing to, what your impact actually is, what your value proposition is. So you can partner with a marketing professional to help you game out what those key messages are going to be, and how you're actually going to deploy them. But another big

**Kimberly Swartz** 16:08:16

challenge, is it okay, I just I want to jump in to add something on the brand awareness and credibility piece, because so many folks chimed in earlier saying that marketing and specifically social media marketing, and we had a few SEO, folks chime in AS well, was their primary need. And I would ask you, like, do you have these core infrastructure pieces in place, because in order for a social media volunteer or a copywriter, or a graphic designer, to be really successful AS a pro bono partner for you, these are all pieces they're going to ask you for, they're going to ask you for? What are your brand guidelines, where are your key messages that I can lean on, so I'm not creating something new, and my tone and my voice and the copy that I'm writing is going to be completely distinct from the actual look and feel of your organization. So these pieces will help set you up for that social media or for that graphic, does graphic design execution that you let a lot of folks are reporting needs in?

16:09:32

Yeah, thank you for addressing that, Kim. And that that actually goes back to kind of one of our pro bono best practices that we like to talk about, which is, you want to take time to think about the dependencies for any given project, what needs to happen first, before you can jump to the next thing. So this can sound very simple, but believe it or not, you know, we I've had talks with nonprofits who are talking about, you know, putting together a website, and then I asked them like, key messages, color palette, logo, you know, and they're like, Well, we have a logo, but those other things and I'm like, Okay, what you really have here first is a key messages and kind of brand project that you want to tackle before you start tackling your website because any web designer is going to start asking you for those things. And you're going to want to have key messages to actually put up on your Are your websites that are compelling. So you could potentially start working on just the basic framework for a website and do these types of projects in concert. But you're going to want to start thinking about that what needs to happen first before you, you start to address a lot, you know, social media needs, you usually want to make sure to have these things in place, in particular, a communications plan. So you know, when you're posting, and how you're posting and to whom you're posting. So again, think about the dependencies when you're assessing, you know, where many of you're probably looking at this and going well, all of these are things we need. I hear that a lot too. Like, okay, what needs to actually happen first be some of these, I think are a bit dependent on others. So this is a big one, funding and sustainability. That is one of the biggest things I hear about when I do one on one for nonprofits is we need help with fundraising. Fundraising is a really, really broad category. It encompasses many, many different kinds of projects. And what I, if you've ever had a one on one with me, I would say the the kind of secret behind fundraising projects is that any project can almost be a fundraising project, depending on how you're using the deliverable. So you want to think about it in broad terms, and then try and whittle things down. We like to talk about resource raising versus necessarily fundraising because, you know, your, your sustainability and organization is obviously dependent on funds, but it's also dependent on things like in kind donations, pro bono service, you know, things like that, which are resources, even if they are not necessarily monetary resources, but they have $1 value that goes with them. So we usually like to talk about it more holistically AS AS resource raising. But that's one of the reasons why you're saying funding and sustainability here. So some great projects you can tackle right out of the gate give you a good foundation that you can build off of later AS an organization are something like a chart of accounts. This is really, really important. And some of you might be going well, we just don't have that much money. Do we really need you know, an extensive budget or anything like that? The answer is yes. Even if you're working off of a very, very small amounts, it's very, very good to start inculcating those good accounting practices for Hey, if you if you strike it big and get like a very big like backer donor, all of a sudden, you're going to have a bunch of money. And then you're going to need a chart of accounts, or a budget of some kind to, to organize all of that, in particular, having something like this in place is going to set you up when transparency comes into play. And I'll be honest, it's a really big deal for partners and grant makers, they want to see transparency, transparency, your organization, they want to see your financials. And you're going to need to have that organized and presentable and ready to go for them when you start making pitches because they are going to ask you for that. In many cases, your application won't even be looked at, if you cannot provide something like that. So no matter how small the amount you're working with is go ahead and try and develop a chart of accounts. You can you can use some kind of technology like QuickBooks, or if if the person you're working with says look, we can just create like a nice kind of Excel like version of a chart of accounts for you to work off of. You can do that there AS well. There's multiple possibilities. Developing a case for support is another really, really good way to start sending out feelers to people who might be interested in funding your organization. So case for support. Some of you might have seen these before. They're basically write ups that talk about your your your value proposition AS an organization, what the the need that you're tackling is how you tackle that need. What you need to be successful in tackling that need in terms of monetary support. It's going to lay it all out very clearly and succinctly. A Case for Support is oftentimes how you start developing people to potential funders that who are going to support you is sending out those cases where supports case for support information, seeing who responds along with like a marketing campaign or something like that. It can be a great way to open doors to to having potential conversations with with funders and and other development opportunities. Also, you'll see here, grant proposal review. I'll be completely honest with you right now. grant writing and research. Support is very, very competitive. It's one of our most competitive areas. AS in which we just see kind of an asymmetry in supply and demand, a lot of lot of nonprofit organizations are asking for grant related support. So I always like to set that expectation. Um, something you can ask for that I think is a kind of Lower Lift is if you already have a grant prepared that you want someone to review, who is maybe a grant writer, that can be a really, really great early project, especially if you're just dipping your toes into the pro bono world and just kind of seeing how that works, which is just a review, and maybe recommendations and edits for current grant application that you are working on. And then finally, an earned income strategy. So many, many of you AS nonprofits probably know already. But if you don't, that earned income is a way for nonprofits to make money. So you are a nonprofit organization, obviously, your your your main, your bottom line is your mission, not necessarily appealing to stakeholders. But nonprofits can do business, they can sell merchandise, they can sell services, they can, you know, open up their own venues and things like that, and, you know, book space. Those are all completely valid ways for nonprofits to make money. And in the nonprofit world, we call that earned income. Again, you're gonna want to have a chart of accounts, to document your income and how much you're making an earned income it is for government purposes, in most cases, that's going to be needed to declared separately beyond just individual donations and grants and things like that. But an earned income strategy is something you could get help on with a business professional, who could maybe assess your environment and see where opportunities are to potentially sell merchandise or services, potentially monetize something that you that you already have in place, with it with a business strategist and come up with a potential business model for actually selling, you know, your first bit of merchandise, even if that's just, hey, we have some merchandise, we're gonna open up an e commerce Store on our website, it can be AS simple AS that. That is our income, oh, we sell, you know, pens and pencils and notebooks and things like that with our brand on it. Now termed income. If you're doing services of some kind, you could potentially sell services. So those are just some quick examples of various types of earned income. But these are all great kind of starter projects for thinking about fundraising and sustainability and kind of resource raising broadly. And like I said, you can already see how some of these inter interplay with each other, like that example of the the earned income strategy. And then if you're going to have earned income, you need to make sure to have a chart of accounts AS well to document that. So getting thinking about the dependencies and how some of these might be interrelated with each other. And thinking about which ones need come first, is is a really good way to start thinking about using pro bono.

16:18:37

So this is one of my personal favorites, which is strategic planning. I like talking about the challenge of strategic planning, because you all probably know better than anyone, what are the challenges of starting a nonprofit is making the time and bandwidth available to actually just do strategic planning, most of you are probably grinding away and you're just doing the work. You're like, I don't have time to, you know, think big sky, in your eyes and things like that, because we're just trying to, you know, execute our programs, or we're just doing the work right now I'm wearing multiple hats. But I really, really urge you to try to make time for strategic planning, because strategic planning is going to make sure that everyone in your organization is actually working towards the same goals. Some of you might know this from firsthand experience that everyone at your organization, they might be motivated. But it seems like we're working towards different visions that sometimes strategic planning efforts going to help solve that problem. And make sure that your organization broadly speaking, stays on point, and and on mission. Strategic planning is another one of those things where when you start making cases for support, when you start entering pitch conversations, when you start asking for funds, when you start filling out grants, those people are going to want to see evidence of some kind of strategic plan or some kind of broader strategy that you've put together. The analogy I love to use is you know, if you're starting a business and you go to a bank to take out a loan, that bank is probably going to want to see your business plan. And I know for a fact for many, many grant applications, they're going to ask to see a church Egypt plan of some kind, sometimes that is required. Sometimes it's optional. Either way you want it, even if it's just optional. And you can get there by doing some of these, these projects. The first one we have listed here is the mission and vision statement development, just seems really, really basic. But again, goes back to that problem that I highlighted where everyone's just kind of doing the work. And maybe not everyone is in sync about the ultimate mission and vision you all are working towards this mission and vision statement is going to be the thing that rounds everything at your organization, it's going to be like at the top of your strategic plan. And then ideally, in a strategic plan, you're going to map out the broader goals usually over a period of time, and the associated outcomes and activities that you're going to need to do to reach each one of those goals. But everything starts with that mission and vision statement. If you don't have a saw, if you ask everyone to organization, what's our mission, and everyone kind of says something different. That's probably a sign that you need to do this process with with a strategy expert. The second project we have listed up here is conducting a SWOT analysis. For those who don't already know. SWOT just means strengths, weaknesses, opportunities and threats. When you enter into a strategic planning process, the first thing that you're actually going to usually do AS part of a basic strategic planning process is your organization. And your leadership in particular is just going to be a sponge, you're going to take in AS much data and information AS possible. In legal terms, you're going to do a lot of discovery. And you want to make sure that your leadership is armed with enough information, to start making decisions about what your goals over the next however many years your strategic plan and conferences is are actually going to be. In order to do that a SWOT analysis is a great type of data set really to have. Because if you can partner with an analyst or a strategic analyst, or someone who does kind of SWOT analysis research, they're going to tell you what your strengths, opportunities, weaknesses and threats are. And they're going to potentially point out who are competitors who are collaborators in your in your field that you could potentially work against or with, they're going to tell you your general environment, that's going to inform, you know, potential program design, you're going to be doing who you're going to be hitting up for funds and resources. So it's a really, really great type of just analytical study to have, so that you can understand your position and you know, any hurdles or that are going to come up things you all need to watch out for. Finally, the last one listed here is program design. Program Design is a really great type of project because many of you might have really great ideas for new programs, you want to pilot, maybe you're you're still in the startup phase, but your organization only has kind of like one flagship program, and you have ideas for other programs, that could be very, very beneficial for your your beneficiaries. So doing a program design project, can help you map out the steps it's going to take to actually pilot and execute that program. Importantly, they're also going to put together what the intake of any impact data about that program could potentially look like. So how are we evaluating the success of the program, but also the logistics of actually carrying out the program? So okay, how many staff members are going to need to be involved? In terms of facilities and resources? What that what is that going to look like? If we have to manage intake are we what kind of technology do we need to use for that? It's almost like, you know, kind of event planning. But you're you're planning to an initial pilot of the program. Program Design is also going to help, you know, figure out how you can pitch and potentially scale up that that program model. So that's a really good project that also falls under the Strategic Planning bucket AS well. That is also going up AS a template that you can use on Taproom plus. So just keep that in mind.

**Kimberly Swartz** 16:24:59

Just jumping in again, because I've really loved how you broke down each of these really big meaty projects in and of themselves. But there are ways to divide up the strategic planning process which can feel so daunting and so overwhelming for nonprofits. And I gotta tell you, we've had so many conversations over the years with earliest Ah organizations that are approaching strategic planning for the first time. And, you know, their first question is always well can I just can I get a volunteer to step in and just help me make the plan. And so I want to say really, really plainly that it is not feasible to think that just one pro bono consultant is going to be able to help craft and develop a full strategic plan on behalf of your organization, you need to think about strategic planning AS a process that is broken into several different roles that you can bring in external resources for like these discrete pro bono projects that Josh just spoke through. But one that you're also really going to have to make use of internal resources for AS well. Volunteers, pro bono consultants cannot make direction or make, make a decision about the true direction your organization is going in. So these are the types of projects where you're going to have to ensure you've got the internal staff bandwidth and buy in to be involved AS true collaborators in this work. A volunteer can't create a mission and vision statement single handedly for your organization, there's got to be a lot of rounds of feedback and really strong collaborators internally ready to go. So just keep those things in mind.

16:26:51

Yeah, Kim, that is very crucial to bring up which is consultants cannot make should not be making leadership decisions about the goals that your organization are going to pursue, they can help you get arm you with data. There's even projects that we could put up here and maybe later in the strategic planning process where a strategy facilitator can help your leadership team and your board facilitate that discussion that they have about what your goal should be. But they should not be the ones making the ultimate decisions about what your goal should be, that should be your your board and your leadership at your organization. But that is another project that is commonly asked for is strategic planning facilitation, for someone to actually organize that conversation. That's a little bit down the line, when you're kind of at the end and want to kind of get your goals on paper. But that is another project that we know people have, you just have three plus four, to get assistance on limited human resources. This is a big one, that many of you probably know very intimately. I talk to a lot of nonprofits that Trump, you know, are just maybe like two to five employees. Sometimes they're all volunteer crews, you know, very, very small staffs. And what we really recommend here, might seem counterintuitive, because you're like, Well, if I only have like a handful of people, we really need an organization chart. An organization chart project is it's a great aspirational project. It's a great project. Also, if you're getting an influx of new funding, and you you start thinking about, hey, we can hire some maybe part time administrators and things like that. If you get to the position where you can start making new hires, you're going to want to be able to have at least like a big sky vision of what your organization could look like, in terms of its human resources, so that when you actually start making those decisions about who you want to hire, when you get, you know, make that first big pitch and get like funds, you know, for the next two years, you've already have an org chart in place telling you, okay, here's the next people you need to hire, if you really are serious about going after your goals. So again, might not necessarily make sense when you're like, Well, we have three people. And we all just kind of talk to each other. We don't need an org chart. Think about the future. This is going to set you up for success. When you actually do start, you know developing and growing AS an organization. The other project up here that's not commonly thought about AS a human resources need. But it's very, very important for organizations early on is board recruitment. So your board is ideally, especially in your beginning stages is probably going to be something like a working board. And your board is going to work closely with your organization's leadership. Again, ideally, they are going to be responsible for the financial health and the strategic direction of the organization. Your board, usually, you know, if you get your board firing on all cylinders, it's not necessarily going to be managing any kind of day to day at your organization. Again, when you're in early stages, board members are oftentimes doing a little bit more of the nitty gritty, but you want to aim for a board that is more of a governing board. board recruitment strategy projects can be really great and identifying the types of skillsets that you want on your board types of people that you want on your board, or diversity, making sure that people that your program impacts directly are represented some way on your board. Again, I brought up partnerships, grant strategy, or grant applications, things like that. board composition is something people ask about. They want to see what your your board looks like who's on it, and what their skills are, what they're bringing to the table. So again, executing a strategic board recruitment process, can help you have a healthy board that is going to be good for pitching your organization and raising funds down the road. Then our final challenge, technological infrastructure. So you know, if your organization's just starting out, you might need help answering questions about like, Okay, what kind of tech solutions should we be using? If we are using certain tech solutions already? How could we be using them better? In particular, I think I'll start with the last one here. First. accounting systems can be very, very important. If you want to use QuickBooks to set up a chart of account, you could partner with someone to help you set up QuickBooks for the first time and make sure that all your i's are dotted and T's are crossed. Maybe you know, you set up your website in in Squarespace. And, you know, you're maybe not using it AS well AS you could, or maybe you want someone to train the rest of your team on how to use it. So you know, if you go down, if you're sick or something, someone can step in and update the website regularly, you could get that kind of training support. For you know, whatever web platform you're using, or, you know, if you just want to make use of all the tools that you know, you're not tapping into very well. That's another great project. And then at the very top here, very, very common tech tools that a lot of nonprofits are using to store all their data, their files, making sure that everyone knows where to go to find those files. When you start developing things like brand guides, templates, your key messages, okay, now everyone go to SharePoint on Office 365. And this folder where we keep all that information or your G Suite, your Google Suite, this is how a lot of nonprofits, especially now that everyone's working in a virtual environment, are conducting all of their work, you know, you can get someone to help you set up, hey, we need to, we need to assess whether we should be using Microsoft Teams or slack to communicate with each other. Which one works best for us. Those are things that are great technological types of projects that you can tackle right at the beginning here of your organization, that are going to kind of just set up your basic tech infrastructure for success in the in the near future. So that kind of brings us to the end of the challenges and the projects you can use to tackle them. I hope you at least found something on here you weren't already thinking of. But I'm gonna pass things back over to Kim now to to lead us into the next part of our presentation to talk about how you can you can access some resources.

**Kimberly Swartz** 16:33:40

Hey, everyone. So I'm seeing the chat has absolutely been buzzing AS you've been going, Josh, and it looks like a lot of people are responding to the different examples that you were calling out. And also just acknowledging that the challenges you're speaking to are very, very real and are absolutely felt across our community. And so hopefully, that is helpful just in and of itself. So you know that there are people out there who are dealing with the same exact challenges you are and we're hoping to create more opportunities for you all to network and build deeper connections with one another so that you can at the very least commiserate. But at the very most work together to help each other grow your organizations to that next stage. But in the meantime, we'd love folks just to pop into the chat if there's one pro bono project example that Josh spoke to in particular that you're really interested in immediately diving into. I mentioned this in the chat a few minutes ago, because we got some really great questions around templates. And so by the time you receive the follow up email for this event tomorrow, we will have every single one of these examples loaded into the taproot class project request form AS a pre scoped project. So I strongly recommend I think you should be able to see that create your taproot plus link at the top of your page still create your account today. And so then when we send out the follow up email tomorrow, that'll be your indicator that all of those are now loaded AS templates in your account and they'll be ready to go And so, like I said, we're going to share out this recording and also share the deck with you after this event. But check out this slide it has a little bit more information about taproot plus, which is kind of tap Roots gateway to how you can access all of our services and resources that our nonprofit offers to other nonprofits. So if you want to be a part of the taproot community, create your account, it's free of cost. Your staff and board are unlimited accounts, we don't put any limit on the number of people you can actually have signed up for taproot. And through taproot plus you can request on demand support through consultation calls, or through multi week projects. But it also grants you access to taproots, full suite of corporate or grantmaker lead programming, which is available when funding allows us to make it available. So if we do have an event coming up serving organizations in your issue area, or serving organizations in your state or city, we will send you an email to whatever email address you use to create your taproot Plus account. So make sure that's an account that you do check regularly. All right, so I want to make sure that we have plenty of time to dig into any remaining questions, because we answered some AS we went, but I believe we still had a few that were stand alone. And I also want to call out that we have additional coaching and training services available. And so AS we're we were going through this presentation, you heard Josh mention, oh, I think I might have talked to you one on one or I mentioned this a lot in my individual coaching calls, we do have that specialized service available for folks. And so if that is something that your organization thinks you could benefit from, please let us know respond to that follow up email, we want to make sure that we get you into the pipeline signed up for one of those coaching calls. So please just stay in touch. All right, I'm just scrolling through some of our open questions right now. And it looks like Josh, this is a really great question from someone early on. What if you are a startup now button tend to be much larger later. So we've got people with growth aspirations, which is beautiful. Do we start with establishing the small version? Or do we plant big and start big?

16:38:08

Yeah, I think I think during your presentation, I think I talked about the Red Cross a little bit, or you know, something like the Human Rights Campaign, very, very big nonprofits. All those nonprofits started out small AS startup organizations. But I think you're keying into something that's very powerful, which is, even when you're in kind of that startup phase, you always want to keep an eye on what growth looks like. And not just kind of the big sky. But okay, what is going to need to happen to get us there. potential funders and partners are also going to want to hear what your vision is to get there AS well. So I think it's really good to recognize the current limitations that you're in, but start thinking about, okay, if we had a massive grant, how would we organize that? What like, if all of a sudden we get a angel investor tomorrow? Who's willing to dump six figures into our organization? Do we have plans in place to make good on that, that's laying the foundations for for your nonprofit, in this time period, I think if you can lay the foundation of early, get okay, we only have $500 in our bank account. Let's let's think about if we got $100,000 in our bank account, let's go ahead and organize a train of accounts, you know, put systems in place that are going to be able to accommodate growth that are elastic that you've okay, we've done the hard work, we've actually got out in front of this problem. We already gamed out, hey, what if we get six figures worth of funding what that looks like? Or, you know, it doesn't have to be six figures. But having these kind of elements in place will help you the key word here you'll hear us always use is scale. kind of build, you know, okay, we can successfully conducted our pilot program. And now we have a bunch more money we can do. We can make it bigger. So you always want to think about scaling options. So the answer to your question is kind of both You always I think, want to think big, but you're, you're going to act kind of in the immediate with an eye towards the future. And if you can think like that potential funders and partners like to see that you can think like that, AS well that you have a vision of where you're gonna go when they ask you okay, what are you gonna do with our six figures? Right? Yeah.

**Kimberly Swartz** 16:40:49

100% I think what you're saying is exactly correct your operations, your operations, management should be rooted in the here and now. Right, tackling those, the bottom level of Maslow's hierarchy of needs, like what do we just need to make things happen to get things rolling right now. But you should have that future looking focus? And that's a question you can ask your pro bono partners, right? You can ask them and say, okay, the system looks great for what we've got right now. But using your expertise, how would you recommend that we expand this if we hit X indicator, if we hit Y indicator if we reach Z goal, right, so use your volunteers to build in some of that elasticity so that you're prepared for growth? All right, Josh, I think we've got a few questions. So I'm seeing some specific questions come in around the earned income strategies specifically. And then Rhonda put in some good questions around a si si compliance teams in place for growth. I'm just going to say this super plainly Taproot Foundation, we are not the experts in accounting in sec compliance. These are questions you should pose to our expert volunteers. Hopefully that makes sense, right? So we want you to use our services and our programs to get connected with the expertise that is qualified to dig into these specifics with you. So take note of all of these right Rhonda, jot down that note, the folks who were asking earlier around the tax implement implications of earned income, all amazing questions, and all items that we have a full suite of Accounting and Finance volunteers who can dig into those with you during a one hour consultation session, or a multi week project. So I'd highly recommend that you consider those. And then Josh, I saw a few questions come in earlier around eligibility. And so I think it would be great if you could just speak to we had questions specifically around can Where did the organization's needs to be based? Do we work with fiscally sponsored social good organizations? So let you hop in there.

16:43:16

Yeah, so AS far AS taproot plus is concerned, we have a few kind of eligibility slots that you could you could fall into. If you're in the United States where the bulk of our users are. In order to be eligible in the United States, we we require that you either the A 501 C three nonprofit in the in the United States, you can also have Rob, if you have written confirmation, signed confirmation attestation of fiscal sponsorship from a 501 C three nonprofit, that is also something that will make you eligible to use taproot plus, if you're a publicly funded institution. So a public library or even a school or we know there are some public programs run by municipalities and cities and local governments that run like nonprofits, but are publicly funded programs. Those are eligible to use taproot pluses. Well, we are a global organization. So we are cleared to work with or open our marketplace in certain countries. So the United Kingdom, Canada, the EU, R and India, are other countries in which we are currently open. We want to expand our geographic presence AS much AS possible. There are legal hurdles, we have to overcome to opening a online volunteer marketplace in a in a foreign jurisdiction. So if you're wondering why we're just not open everywhere, and that's that's one of the reasons why we kind of have to take it AS it comes. Again, we are a nonprofit ourselves, we're trying to be strategic in terms of eligibility with with for foreign nonprofits, or for nonprofits not headquartered in the United States. We usually make those determinations based on a combination of factors. Not every country necessarily has a registration database for you know, similar to why our IRS database or something like that. So, we we usually say we make those determinations, out of a combination of kind of, you know, Looking for things like any kind of database that exists in the country that we can cross check the nonprofits information against. In places like Canada, they have, you know, charitable registration, you know, online databases and things like that. But our general party line there is like we make those, those determinations on a case by case basis. Um, but we are aiming to be AS expansive AS possible. Like I said, if you're in the United States, we kind of do have those three main kind of criteria. But we are available to to other nonprofits outside of the United States AS well, AS well AS volunteers. One of the other caveats is, we usually don't work with organizations whose mission is primarily religious proselytization. It's just a kind of a value, value judgment that we made AS an organization a long time ago. So again, that is something that we assess. You know, we do work with many, many religious organizations, or faith based organizations that is actually most nonprofits in the United States. So you know, if you're a church or something like that, that is running a shelter, or soup kitchen or some kind of public benefit that's accessible to everyone. You're more than welcome. To use pro bono services. We work with many, many faith based organizations across the country. We just have kind of that baseline requirement that the bulk of the programming has to be nonprofit militarizing. So I think that that about answers that Kim, if you if you had any other comments to add there?

**Kimberly Swartz** 16:47:03

No, I think that was great. And I also want to be cognizant that we are a few minutes over time. So we may have folks who do need to jump off and jump to their next meeting, Josh, and I can hang out for another couple of minutes. And then we also need to jump, but we're gonna keep recording. And so just right now, I want to take the opportunity to say thank you for jumping in and sticking with us. Again, we'll stay on to answer one or two final questions. But if you do need to jump off, please feel free. And you can catch up with us on the recording. So Josh, an interesting question that came in earlier. And I think it was from several people, but just worded in different ways, is there are so many examples that were shared during this deck. And there were six really big challenge buckets that we talked through AS well. So in your mind, and from your experience, working with others, early stage organizations, what are like the one or maybe two pro bono projects that you recommend kicking off first? When it looks like you're muted,

16:48:20

I just realized that, um, AS I was talking, luckily, the interface tells you most times I yeah, I was thinking about this question, because I saw it come in, of where to start, I think it's, to a certain degree, it's going to be dependent on how far along you already are. But I would focus on in the early stages, trying to assemble a really a really great board, they're going to be very, very critical to your organization in those early stages. Focusing on program design, piloting, you know, a core kind of flagship program is usually like where you start. And then making sure you have a basic brand in place, color palette, logo, key messages, that's kind of like my trifecta of where you should maybe focus a lot of your energy first. And I think that that board in particular, is ideally going to be able to help direct you strategically, so that you can kind of set up to start you later doing kind of a formal strategic plan. Most people do not. I mean, if we had the luxury to set it up the way we'd like we'd start with the strategic planning first. But I also just want to recognize that most nonprofits, that is not how most nonprofits get off the ground is starting with this strategic plan. Most of the time, people have a brilliant idea. They start trying to assemble a program together, then they realize they need a board, nonprofits, oftentimes reverse engineer kind of, you know, the process, because they have to, it's not like businesses where you can create a business model and get seed capital and you know, and start off kind of already with things in place. But yeah, I would, I would advocate for focusing on those things. First and foremost.

**Kimberly Swartz** 16:50:14

Okay, great advice, and you're getting a lot of great advice and thank yous in the chat. So Josh, I hope you're you're scrolling through and Taking note of all of those. It looks like we've got a few more questions in the chat. But they're relatively specific and tied to their specific organizations. So what we're going to do is, we'll we'll go through our chat log after this. And if there are any open questions that we know we didn't answer on air, we will loop back with you one on one and carry forth those conversations. So we're not going to leave anyone hanging, it just might be something that is a little too specific for us to address on air. But we'll be in touch through email. All right. So at this point, I'm gonna go ahead and wrap things up. This was a really incredible conversation. And I really appreciate everyone who stuck with us to the very end, thanks so much for joining us. And I hope that this can be a launching point for all of us, and much more work to come between each of your organizations, and taproot and our amazing volunteer community members, because there truly are 1000s and 1000s of individuals who are itching to get involved with organizations with missions like yours. And so we really can't wait to get your requests help you out with the scoping, and then get them published so we can get volunteer interest trip in your way. So thank you so much for joining. And thank you Josh. This is incredible. I'm glad we were able to do this together.

16:51:59

Yeah, it was a lot of fun. Thank you, Kim. Fell, hopefully see you online.

**Kimberly Swartz** 16:52:04

Yeah, see you on taproot plus soon. Bye, everyone.