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All right, well, I want to go ahead and officially welcome everybody to taproots webinar, running holiday giving campaigns with skilled volunteer support. Really, really grateful to have you all here. I know, we're a day out from a long weekend for our US base folks, and so appreciate you jumping on on a Thursday afternoon, or Thursday morning to be here with us. And so many amazing nonprofits have already introduced themselves in the chat. And I saw a few prospective volunteers introducing themselves and their skill sets AS well. So I feel really good about the audience we have on the line. Definitely good vibes, definitely a good community. And so please keep those networking connections going. Share your website, share your LinkedIn, we love to see it. So I'm gonna go ahead and start moving us along. Since you all have been so kind and have been doing some introductions for yourselves and your organization's I will do the same. So my name is Kimberly Swartz. You can call me Kim pronouns she her hers. And I'm taproot, Senior Director of Community Engagement, which really just means that I focus on what the experience feels like for nonprofits and volunteers and small businesses who connect with one another through taproots programming. And I'll talk more about taproots programming a couple of minutes. But at the heart of that we're connectors and we think more connections between different sectors will make our communities a lot kinder and a lot safer, and a lot more just. And so while my current role is focused a lot on program design, and people management, program management, AS well AS partner development. In previous roles, I was really focused on marketing and communications. And so I'll be leaning a lot in my on my marketing background, throughout today's webinar, mixing that with my current role and and kind of the services I do provide for taproot.

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Also, I will lean on some experience that I have regularly consulting with other nonprofits, largely earlier stage or startup organizations, on their marketing and business development challenges. So, I do have quite a bit of volunteer experience behind me. And so AS folks have questions throughout the event on, you know, why do volunteers do this? Or what will really make something stand out to them? Or, you know, what's the biggest challenge you see pro bono consultants have AS they work with nonprofits on these different project types? Definitely don't be afraid to shout out those questions. And if there are any other experienced volunteers on the line, I would really welcome that you jump into the chat and add your perspectives on those questions AS well. All right, so a few logistics notes. This is a webinar format. So attendees will be muted throughout the event, but please use that chat box to communicate with us. So I will be keeping my eyes on the chat box AS much AS I can throughout the events. But I also am really, really pleased to be joined by a couple of my taproot colleagues, we have Meghan Gillette, who if any of you do have taproot accounts, the odds are that you have spoken with Megan through email before, and she'll be answering any taproot plus specific questions AS we go. And then we also are joined by taproots fearless Content Manager Sameena Usmani who can answer questions, especially about content marketing, AS well AS other realms of marketing services, that taproot can connect you with volunteers for so don't be afraid to shout out questions, commentary feedback in the chat. I will save time for q&a at the end. But Meghan and Sameena will be answering those throughout AS well. And like I mentioned, we are recording this event. And we will share with this recording with you, hopefully by the end of today, and if not that, then tomorrow morning. All right. So during today's event, we're going to be covering a quick introduction to taproot and the overview of the services that we provide through connections with our skilled volunteers. And I say quick because we've got a lot of really, really great holiday giving volunteer project recommendations to dive into and I want to make sure we save a ton of time for that. And so we're going to zoom through an intro to taproots programs and then we're going to dive right into the good stuff.

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And the good stuff will include kind of an overview of some marketing channels that you can leverage for your holiday giving campaigns. And then how volunteer support can help you create the infrastructure, and then develop the strategies or even execute fundraising campaign elements through each of those marketing channels that we've discussed. So I can confirm that you will leave with oodles and oodles of recommendations for tactics to use during your holiday giving campaigns, or just your individual giving fundraisers in general. So you jot ideas down for 2024. But more importantly, you'll leave with loads of ideas for volunteer support that you can request right now through taproots. Free programs. And then of course, we'll save some time for q&a at the end. All right, so like I mentioned, it's a lot to get through. So I'm gonna go ahead and get right into it. So an introduction to taproot, since many of you this is your first taproot event, I think it's important to just take this pause right AS we get started. taproot is a nonprofit, and we exist to support our fellow nonprofits. We were founded back in 2001. So well before my time with the organization, with the knowledge that there's a massive resource gap present in the social sector, right. So we have organizations who may very well have the solutions to our world's most pressing challenges, but they simply don't have the financial means, or the staff capacity to carry out those missions to their fullest extent. And so, tap root, our mission is to empower and enable mission driven organizations by mobilizing skilled volunteers to really advance this resource equity advance.

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And democratize I would say access to resources for nonprofits so that regardless of their mission area, regardless of their budget size, or their staff size, or the years they've been in operations, or the amount of social capital their founder or Executive Director has, they will always be able to come to Tapper and access high quality, pro bono expertise in the fields of marketing, it HR, strategy, finance, operations, and more. So, let's get into our programs a little bit more, because I want you all to be able to, if you take nothing away from this event,

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other than taproot account and the ability to create some volunteer connections in the future, then that will be a win. So like I mentioned, we're here to get nonprofits, the business support they need for free. So since our founding, we've partnered with over 10,000 social change organizations and 10s of 1000s of volunteers, totaling around 300 million in donated professional services. So we forge hundreds of these connections every week through this free online platform called taproot plus, which some of you may already be familiar with. You may have even heard about this event, because you had created a taproot account already, which is awesome. But really, what taproot plus is, is a free to use volunteer and nonprofit matchmaking platform. So we run community lead programming through taproot plus, but additionally, our nonprofit does partner with, at this point, over 100, fortune 500 companies through our advisory services practice, which brings talented corporate employee talent directly to nonprofits across taproots network. And I shout that out because a frequently asked question that I always get during these events, is where do your volunteers come from? And our corporate partnerships are really big inbound source for many of the volunteers that you have the ability to connect with through your taproot account. So, AS I mentioned before, we are really striving to lower all barriers to entry for organizations who are just starting out, or looking to grow, or maybe are already established and are looking to make that next step. And many of our most active program participants are very early stage organizations who may be under 10 years old or are completely volunteer led. So if you're in that position, never fear you are welcome on top of class. Okay, so, I'm gonna go ahead and ask Megan to go ahead and put a link to taproot plus up on the screen and that

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should help anyone who doesn't yet have their taproot account, you can go ahead and get signed up right now. And let me put a little bit more information about the site up right here for you. And we'll look, we'll share the stack after the event AS well. So you can always dig into any slides that I don't explicitly read all the copy for. But this is where you'll find information about how to join the tapper community. This is really our front door to accessing services through our nonprofit. AS I mentioned, it's free to have an account request services and leverage taproots resources. And we have a virtual community of over 150,000 skilled volunteers from the worlds of IT and technology, business strategy, HR and leadership development, marketing and communications, software development, designing creative, AS well AS operations and analytics. And I shout out those skill areas because I want to get your wheels turning about how you can start tapping into those skill sets throughout your fundraising campaigns. But also in other areas where you might be looking to build capacity, or strengthen existing infrastructure. And I'm sharing this program participation info with you right up top. Because if you hear about a volunteer project, during the course of this webinar that your organization needs, I want you to immediately be able to request that support. So like I said, Meghan and Sameena are on the chat right now ready to answer your questions. And I won't be offended at all, if you pull up taproot plus.org and another tab and start drafting a volunteer request while I'm talking about it, right. What better time then to do it while you have taproot staff members on air with you live, so definitely feel free to be working on that in your other window. So you and your nonprofit are able to submit on demand request for volunteer support through one hour consultation calls. with subject matter experts. We call these sessions AS well AS multi week in depth projects, where a volunteer works with you to create a specific deliverable. So a really tangible outcome like an HR handbook, or, in our case, maybe a social media strategy for a holiday giving campaign.

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So keep these two pro bono options in mind because I'm going to reference sessions, those consultation calls and projects, these multi week engagements. I'm going to reference them when I chat about fundraising campaign elements that volunteers can support with.

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Speaking of let's go ahead and get into it. All right, so skilled volunteer support for your holiday giving campaign.

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Look, taproot is a nonprofit ourselves. And I already saw a few questions come in around how taproot receives its funding. We are a nonprofit just like you all. And so of course, individual giving absolutely something that we try to encourage sponsorships from businesses, absolutely something that we try to get going taproots a little unique in that I mentioned, we have an advisory services practice where we partner with companies or grantmakers. So we have a fee for service model. And that's really how we sustain much of the free programs that our organization runs. And so every nonprofit is going to be unique with how it's approaching revenue generation. But it definitely is safe to say that holiday giving campaigns, largely due to the success of Giving Tuesday, who's a fantastic partner of taproots. And I highly recommend all of the resources that they have available through their organization, they have really increased the relevancy and increased the social media aspects, the email marketing aspect of what goes into these year end holiday giving campaigns. It's a really, really amazing opportunity for organizations to put themselves out there make really, really smart strategic requests about this is what it's going to take for us to create this type of impact in 2024 in the following calendar year, and by donating to us at the end of this year, you can help set us up for that success. So

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that said it's an amazing opportunity, but it can feel like a daunting one. And I can't tell you know how many organizations that I have spoken with and consulted with were the thought of creating a campaign that spans all of their different promotional channels.

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and all send engages their board members, engages their staff engages their volunteer community engages their grant maker partners.

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Thinking through all of the collateral that needs to be created all of the messaging that needs to be created, and then how to manage those donor relationships, once they are established, can be a little fear inducing. And so I just want to acknowledge that right off the top, and encourage you to think through how you could delegate some of that infrastructure, build out some of that business development strategy work. And some of that, AS well AS marketing strategy work. And some of the execution pieces, because volunteers from the corporate space, even though they might not have direct nonprofit fundraising or nonprofit development experience, they still have very relevant skill sets that can translate well towards pieces of your fundraising campaign effort. And so that's what we're going to be digging into today. How can we translate that those traditionally, corporate skills into a very unique to nonprofit need?

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All right, so I want to kick us off. By just covering the marketing channels that your nonprofit is likely going to be utilizing AS part of your holiday giving campaigns, they're likely to include social media, for sure. content through your website, and through other channels, email marketing and public relations. But I definitely want to pause here and just if anyone is planning on using promotional channels, in addition to these core for during your holiday campaign, please shout that out in the chat box right now. Because I'll try to pepper in some additional recommendations for those other channels, AS well. So direct mailing, yep. Okay. I can definitely touch on that, Craig.

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Okay.

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Radio, yeah, and I'm sure podcasts AS well. We can talk about that a bit under the Public Relations, bucket, sewing collectives, community groups. So that word of mouth marketing, I can see that being really, really important, and really

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good at driving those local connections, local donations, okay, definitely keep those coming in. And I'll keep my eyes on that box just to make sure that I'm able to touch on those other relevant channels. But let's start by talking about social media. Because this is going to be an especially important channel for you, if you're focusing on individual giving. And during this year's holiday giving campaign, or you know, maybe you're setting yourself up for fundraising in 2020 form.

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over social media is a key way to establish a high quality, impact first brand presence for current and potential funders. So it's a it's a way for you to be casual and personalize your brand a little bit. But it's also a place where people are going to be coming to fact check you a little bit, they're going to be checking on your feeds When considering your proposals, or they're going to be checking on your feeds when an individual scrolling their Facebook page sees that you're running a fundraiser and during the month of November, December, or December. So keep that in mind. It's a place to be human. And it's a place to create those one to one connections.

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It's also a place to focus on storytelling and the brand narrative that your organization is trying to present externally. So from my experience AS a nonprofit social media strategists, AS I mentioned in my former roles, my top tip here is to make sure that you have a well balanced diet of social content in the lead up to and throughout your holiday giving campaign. Because for every donation request you publish, make sure that you're sharing impact SAS stories of who your services are impacting features of your staff and your board members. Because I do not want to donate to your social media fundraiser, unless you've consistently been on my feed in the weeks if not months leading up to that fundraiser, educating me on the issue that you're solving and the solutions your organization employs. I need to know you if I am going to be ready to donate to you. So a well balanced diet approach you

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You cannot realistically expect to log into your Facebook or your Instagram, or your LinkedIn feeds during the month of November and December, and be able to put out donation requests. And for that to be a successful tactic, you need to build some brand recognition and some consistency with your messages in the months leading up to your fundraising event. So social media, I know it feels very immediate, very one to one connections very human. But there is some long term effort and relationship building that needs to be invested there. So we'll talk about that a little bit more throughout. All right, the next core channel I want to talk about is content.

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So content marketing is a super broad term that really just refers to development and distribution of your organization's story, in the viewpoint, that you're coming at, a societal issue from so especially refers to online marketing, digital marketing. So when we think about content AS a promotional channel, for fundraising, we're thinking about how your website in the content on the site is using key words to really maximize Search Engine Optimization. We're thinking about the stories and the research, and the resources and the events like this webinar, right. This is an example of taproots content marketing strategy, you know, hosting events that bring new community members in.

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So we're focusing on all of those resources, events, content that your organization is creating, and sharing with the community through these different channels, whether it's email, social, etc. So your content marketing strategy will help you always have fresh, relevant materials to share with your Newsletter Lists, social audiences, potential funders, etc. So this content marketing strategy, immediately will help you have that well balanced diet on social media, it will help feed your email, it'll help fuel your public relations work. And so you'll find AS we talk through these different promotional channels, they all definitely lean on and benefit from one another. So an infrastructure investment in one benefits all of your different promotional channels. So absolutely keep that in mind. All right, let's talk about email.

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In an extensive volunteerism research that I conducted for taproot last year, one of the most conclusive takeaways that I can share is that email is the way people want to be notified about how they can support your nonprofit 91% of our respondents included email AS the AS their top option, when it comes to finding ways to support organizations. So when you think about how to leverage email for your holiday giving campaign, I would recommend not just thinking about it AS a collection of one off email blasts, but instead AS a communications experience for your stakeholders, what are they learning? In each email? What is the one action that you want them to take? In each campaign that you're sending out? How does one email build off of or, you know, capitalize for punctuation marks? A huge underscore around this main point that you're trying to drive home? You know, what is that key thing that you're trying to have them learn and and then take action on? So and how are they? How are you segmenting the list to ensure that the right communications the right calls to action, are going to the right people at the right time in their user journey with organization. Someone who has never donated financially to your nonprofit before likely should not be receiving the same emails, that someone who's donated five times to your organization, right? Because blanket messaging

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is going to make your communications feel inhuman, impersonal. And it's going to show the person at the other end of that email that you might not actually care about them AS a person because you're not taking the time to tailor that messaging, tailor that request to them. You need to make folks feel special you need to make them feel heard and listened to and valued by your organization. In one to one email messages is a big big channel you will want to consider and want to invest in for your holiday giving campaign. And then the last one

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Here is public relations. So how are you getting the word out to a community that isn't yet in your direct marketing funnel. And I would argue that some of the things that were shouted out earlier like radio and podcasting, those fall under the Public Relations general umbrella, because we're thinking about reaching broader audiences, through media distribution. And I'll also include media relations in this bucket, because a big piece of being able to successfully execute PR for an event or campaign is having that groundwork of research on relevant media, contacts or publications, and a knowledge of what hook will work best for their audience. You know, radio stations, podcasts, newsletters, newspapers, online journals, magazines, they all have different target audiences. And so talking about your mission in slightly different ways to each one, refining your hook, refining your campaign hook, to each to fit each of those publications, audiences will really behoove you. And again, it shows that personalization effort.

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And it also involves some relationship development, which we can we can talk more about. So

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when we're thinking about how to best leverage these different promotional channels,

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frequently when I'm in conversations with nonprofits, and you know, they're sharing, okay, well, out of everything you talked about, I'm really most interested in social media, and I'm really most interested in email.

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How do I get volunteers to come just handle social for me or handle email for me, so their mind immediately jumps to executing marketing tasks within those promotional channels.

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Instead, I want to challenge us all to just take a step back and look at things for more of a 10,000 foot lens and stance.

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Because while email social content PR are absolutely great fits for taproot volunteer support, and we can get you connected with folks for execution.

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We want to push our nonprofit partners to go one step further and really get to the root of their fundraising challenges. And you can find volunteers who are ready to take that stuck with you and ready to help you make that investments. And their skills from the corporate space absolutely translate well for this. So we find that by focusing on infrastructure pieces, nonprofits set themselves up for longer term revenue generation success, and organizational resiliency. And so with investment in mind, I'm going to hit on four key infrastructure areas when it comes to fundraising, data, brand, website, and bizdev strategy. And so AS we go through projects that you can complete with volunteers to assist in these infrastructure building pieces, I'm also going to touch on how that infrastructure will feed into holiday giving promotion, through social content email in the media. So you will still get tons of ideas for volunteer projects for tackling email tasks, or social media or content, you're going to get plenty of ideas for really individual ways to tackle holiday giving campaign creation. But I also want to give you lots of ideas for infrastructure investment, things that will last you beyond 2023 That will really be able to set you up for greater success throughout 2024 2025 and beyond. Okay, so if that sounds good to everyone, I'm gonna go ahead and get things rolling. And and I want to start with data first. Because above all, supporters want to know that they're making a difference alongside a great cause. So you need to be able to clearly make a case for support and have a tight narrative about what their contribution will enable your organization to accomplish. And so when I'm talking about data, I'm talking about qualitative data and quantitative data. So qualitative being non numeric, call me feedback from stakeholders, funders, community members, etc. And then quantitative being maybe more based around programs, statistics and progress.

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My evaluation, both of these pieces of data are crucial for your fundraising efforts, whether you're focusing on individual giving, or business sponsorship, or maybe you're looking to attract institutional funders from the philanthropy space, or the corporate foundation space. So a few volunteer projects in the realm of data, fundraising infrastructure, I would share these three foundational projects. And these are all items that AS I mentioned, you can go on to taproot right now. And create a request for each one of these if you wanted to, there's no cap on the number of projects you can request at once. There's no cap on how many staff members you can have active on taproot plus, we just ask that everybody has their own account.

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And so if you see any bullets,

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AS I'm moving through this deck, all of those are taproot project ideas, so you can go and copy and paste them right now, into your account. Okay, so let's start with program evaluation, assessment and recommendations.

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This I really feel like is a bedrock,

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bedrock item for all nonprofits to consider investing in this is really thinking through how are we evaluating the success or lack of success of the programs and services that we're providing community members? And if you don't have an analytics background, if you don't have

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a background in data collection, best practices or conducting surveys or focus groups, doing stakeholder interviews? If that's not your wheelhouse, that's okay. Bring in some volunteers who can assist you with maybe this training on Okay, well, what are the evaluation best practices? What are we not doing right now that we should consider doing that could be part of the audit and invest or assessment piece.

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And then you'll be ready to create the evaluation systems, create the surveying channels, create the data collection pieces that you'll need to be able to start embedding hard data and metrics into your fundraising campaigns, AS well AS your grant proposals and appeals to local businesses, right, because without data, backing up your assertions about why your organization is the best way to spend your money to spend your donation to partner with AS a foundation or company, it's really hard to make that case for support. And so really, really recommend investing in this program evaluation piece. And then data analysis and visualization. This is a tough skill set to find within traditional nonprofit program managers, or nonprofit professionals. Sometimes you'll get folks who come with really, really strong data analysis and visualization. I know we have one or two of those staff members at taproot, and I am endlessly grateful when I'm able to pull them into projects with me. But this can be a tough skill set to find. This is something that the corporate sectors, especially folks coming from the worlds of finance, have in spades. And it's a great, AS I mentioned, bedrock foundational piece. Once you have all of your data being collected, how do you sort it, how you organize it, how do you actually study it. So then you can create narratives based on what you're seeing the impact that you're creating in your community.

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And then lastly, I want to touch on something in the qualitative data around which is stakeholder research. If you have not conducted stakeholder interviews in a while, this could be a really important thing to consider in advance of running a fundraising campaign. stakeholder interviews stakeholder research just in general, allows you to just take a pause and talk to your community members, talk to businesses in your community, talk to program participants. In your view your staff members, your board members, former staff, former board, basically anyone your organization touches to figure out what is working really well about our programs or services, our treatment of all

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When tears are treatment of staff members or board members, what do you want more of? What do you need more of from us going forward, this is going to allow you to be much more responsive to community members in the months and years ahead. It's going to be really difficult for you to shape compelling marketing messaging for a Giving Tuesday campaign, if you don't have an idea in mind, of who your average donor is,

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if you don't know what they're motivated by why they are even interested in your organization, where they are hanging out online, what books they're reading, what podcasts they're listening to, it's really difficult to shape a messaging that is going to feel tailored to them. And that's going to inspire them to take action. So I highly recommend stakeholder research AS a volunteer project. And Megan, definitely correct me in the chat if I'm wrong. This is something that taproot has a pre scoped project template for. So we've made it especially easy for you to request this, you just need to select it's pre scoped, we've kind of designed the project already. And you just need to customize the template to meet your organization's unique needs. Awesome. Okay, great. I just saw Jessica submitted one of these a couple of days ago. That's beautiful news, I highly encourage it for other folks.

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All right. So AS promised, I want to touch on

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Channel Marketing, that you can use the data that you've invested in the infrastructure for, and then you can use it in all of these different ways through your holiday giving campaign. AS I mentioned, I am going to send you the deck after this event. I know there's a lot of coffee on this slide. And I don't have time to go through and talk about every single one of these volunteer project ideas. So I'm going to talk maybe about one or two of my favorites, but you will receive this information afterwards. And like I said, you'll be able to just copy this idea and then submit a volunteer request for it. So on this slide, when we're thinking about, Okay, now that we're collecting all of this really great data, we're building our foundation of impact measurement, having these tools that we're able to embed, embed in our fundraising campaigns in our messaging, I really love the idea of having stakeholder testimonials, front and center on your website. So you'll see that under the content category here. So after you've conducted stakeholder interviews, after you have a robust system for doing program evaluation, you're going to have a lot more folks identified who can be really great advocates and ambassadors for your nonprofit. It's not a good sign. If your nonprofit is the only one online saying good things about you. You want to make sure that other people are saying the good things about you. So it's not just you patting yourself on the back. But your community members and program participants or funders, or board members are doing it. And so testimonials is a key way to do that. And once you have testimonials, maybe it's a video, maybe it's some quotes from program participants on your site, maybe it's a long form, blog or interview. Whatever the form of testimonial, once you have that on your website, you can package that up, you can put it out on social media, you can put it out through emails and through newsletters, you can send that out AS a press release, right? So then it becomes embedded in all of these other promotional channels, and brings people back to your website throughout the course of your holiday giving campaign. So absolutely recommend the stakeholder testimonials. But definitely take a look through the other ideas on this slide AS well. Um, but let's talk about our next infrastructure piece, which is brand and messaging. And this is a really important one, when we're thinking about running campaigns that rely so heavily on marketing. This is something you want to make sure that you have in place before entering into something big and flashy externally. So it's a cohesive organizational brand. So just like you purchase products or services from brands that you trust, people give to nonprofit brands that they trust will use the money, time, talent, etc in the most impactful way. So if you're in an early stage organization work in this bucket will probably involve building your brand and decide

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What makes you you?

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What values do you hold really near? And dear? How is your organization? best position to solve? XYZ societal issue? Right? If you're an established organization with maybe already an established reputation, work in this bucket should be an assessment of where your brand is currently positioned? And if that's where you actually want it to be. So how can we use this moment AS reflection points? And then how can we elevate our brand and our brand values in the future, and AS our brands consistently represented to stakeholders, because I gotta tell you, consistency breeds trust, it's kind of something that's born into you, and business school. So if someone is hearing certain information about your nonprofit from one staff member, but then they see something on social media, and it's not presented in the same way, or maybe it's using a different voice, that creates friction, and friction creates, creates distrust. So consistency and how your brand is showing up in the world, regardless of what marketing channel you're using, is going to be really important during your fundraising campaign. But I would say this applies to across your marketing efforts in general. So I have a few volunteer. Again, these are bedrock,

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you know, infrastructure projects, that if you work on with a volunteer, I would recommend requesting the support well in advance of your December, holiday giving campaign. So here we're thinking about developing things such AS key messages for your organization, you know, what's your elevator pitch, we're thinking about creating things like a brand and style guide, so that your colors, your logo is always used consistently, you have an established voice and tone.

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We're thinking about things like communications, planning, you know, templates that your organization uses when you're announcing new programs, new fundraising efforts, new partnerships, etc. And then something I'd also recommend here is a SWOT analysis, which is an evaluation of your organization's strengths, weaknesses, opportunities and threats. This is really important for anyone who's kind of considering, well, how is my brand currently positioned right now? Who are my competitors in the space? And how am I differentiated from them? What do we do better than they do? What did they do better than us?

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Is there anything coming down the pipeline that we should be nervous about, right? Like if this funder decided to pull out suddenly, you know, would that be a potential threat for our organization. So laying all of these items out, really gives you a lot to work from, from a strategy angle for your business development strategy, but also your marketing strategy. And a few of these, I believe, we may even have, every single one of these are templates within taproot plus, and if anyone's logged into their account, you can fact check me but I do believe we have every single one of these AS pre scoped templated projects. So these are all very easy to request volunteer support for AS well.

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Again, I've got so many, so many ideas here listed for you. So take a moment to soak those in.

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Yes, I'm seeing a question in the chat. Does a startup nonprofit need a SWOT analysis? I highly recommend it. Yes, I highly recommend it. It gives you a sense of what's happening in your space. And it gives you a really strong starting position where you're not going to be taken by surprise if you find a potential competitor in one space or another. And it also gives you some knowledge to use when you're talking to potential donors or funders about you know how you're setting yourself apart from other folks in the space.

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And then I'm seeing a question here about conducting a stakeholder interview. I haven't talked about taproot plus sessions too much. These are these one hour consultation calls.

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That could be a great way to use volunteer time through a one hour call is to get yourself prepared for these future projects like stakeholder interviews or stakeholder research. Right like I

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have no experience in the topics. So can you talk me through the process? What should I expect? What should I How should I set expectations internally about what this data will look like and how we're going to use it. So definitely consider those one hour consults can be really great for just building your own knowledge about these topics that you're considering using volunteer time for through these more in depth multi week projects.

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And the calls are with a volunteers taproot plus sessions or with an expert volunteer from the corporate space. We we have user support calls offered by taproot, staff members AS well. But we don't consider those pro bono programming. That's just us trying to help out our nonprofits AS much AS possible. All right, and you can do AS many sessions AS you'd like. Yes. Okay. So hopefully, you got some good ideas from this slide. Oh, my gosh, there's so much you could do. Once you have a brand and key messaging established, you are going to be so well set up for all of these bullets and more, the one that I really would urge you to consider would be something like holiday giving key messaging, once you have your organizational messaging established, you can then tweak that messaging, and fold it into specific campaign or initiative messaging. And that gives you kind of a document that then you have available throughout the lifecycle of your campaign. And you can just pull from whether using social email, PR, etc.

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Okay, I'm being cognizant of time. So I'm going to zoom through this one. But again, you'll receive all of this content after the webinar,

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website infrastructure, I can't tell you how important it is to just make sure that you've invested in a clean, well designed, well written website, because this is going to pay off for dividends for your nonprofit. Everything we just talked about with brand applies here. Your web presence directly impacts the perceptions of potential donors or funders about your nonprofit. So projects with volunteers, doing things like a user experience audit on your site,

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doing a redesign of your homepage, or a redesign of your donation page, or partnering with a volunteer who can actually do some training with you on how to better use your website platform. These could all be really good infrastructure projects for you to invest in well before you kick off your campaign.

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And then for your ideas, I really focused on the channel of content marketing, because we're talking about your web site here. And your website is where all of the amazing content and stories and testimonials that you prepare for your nonprofit is going to live. So some specific holiday giving projects that you could work on with volunteers are listed here. Many of them involve things like developing a new feature for your site to actually assist with the logistics of holiday giving and fundraising, such AS building out a campaign landing page. But also a really popular need that I hear more and more from is bringing in a volunteer to assist with an SEO audit and recommendations. Again, that's a really challenging skill sets to be able to hire and then retain at nonprofit organizations, especially smaller ones, but it's definitely a skill set that folks from the corporate world have an can donate to your organization.

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All right, and the last infrastructure bucket here is business development strategy.

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This bucket, folks from the corporate sector can translate their skills to assist with your fundraising needs. And some organizations shy away from thinking about their nonprofit in for profit terms such AS revenue or business development or cost profit centers, etc, which I understand it's rooted in capitalism, which is a system that causes harms that many of our organizations are actively working each day to address so I get it, but there is value in considering revenue generation from the traditional corporate lens. And it's certainly an area that volunteers from these spaces will really be able to flex their Strategy and Finance muscles on your behalf. So think about things like a business plan, which details an organization's objectives.

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And then how it plans to reach those objectives. So it kind of ties together the, how are we going to bring in money to then fund this impact to fund the services. So it's a bit of a written roadmap for an organization. And it includes marketing, financial, and operational goals, objectives and pathways. So here's our impact goals. And then here's logistically how we're going to afford to make those goals come to life. And I shot this one out, in particular, because it's a really crucial infrastructure piece to consider before diving whole hog into holiday giving.

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Because you know, for example, if you are a board chair that wants to try individual giving, but your executive director doesn't agree that it should be a priority right now, that's a red flag, you do not have the internal alignment on your business plan. So any time and energy that you spend on recruiting skilled volunteer resources, managing those resources, is going to be a waste, because you don't have that internal alignment for successful implementation. So align internally on your goals and the revenue generation tactics that you will employ to meet those goals. And then some of the other projects listed on this slide are good examples of some internal alignment opportunities, infrastructure, build out opportunities, I saw some folks shout out grant making or sorry, grant writing in the chat earlier AS a question taproots volunteers are largely from the corporate space. However, we do have a subset of folks who have grant writing skill sets, because they're either nonprofit professionals themselves, and they're donating their services to other nonprofits. Or maybe they currently work in the corporate space, but they used to work in the nonprofit space. But it's a smaller subset of volunteers. So it's a very competitive project category.

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So just finding a volunteer who can literally write grants for you, is going to be very, very difficult. So I'm warning you now, that's something to consider instead, is having someone review a proposal review your standard grant proposal template, and then make recommendations on how you can strengthen that template. So then you can use it for five grant proposals instead of just one. Right. So thinking through bigger infrastructure build out instead of the small, like one off projects or tasks, because it's going to be tricky to find a volunteer for every single one of those. And then a big one, CRM, customer relationship management systems, I can't tell you how important this is, if you are going to be making a lot of new connections with funders, donors throughout your holiday giving campaign, please have a way to manage those relationships, and track and store that historical data. So that it is not just a one time donation, that you have the infrastructure in place, so that you can continue to nurture that relationship and build it and expand it in the future. You want that $20 donor to turn into $100 donor next year, right? If not more, you need to have a CRM system in place, whether it's an Excel sheet, because that's all you can do right now, or whether it's a platform that is built for customer relationship management, like Salesforce. And again, on this next slide, I have a whole list of ideas. You're welcome to dig into this when we share out the deck later today. But for now, I do want to try and get through some of these other questions. Hopefully, I've answered some of the questions AS we've gone. But I'm going to scroll through the chat right now. And AS I do that, please reflect on all of the information I've shared with you because I know it's been so much.

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But AS you think about your holiday giving to do list,

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what volunteer partnership are you most likely to dive into in the next three months? I'm really curious to see what from this list we just went through really resonated with you and your organization the most?

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Okay,

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so I'm seeing a question around.

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Oh, I saw a question about SEO and then like five people jumped in to answer it. So I thank you so much, everybody for for going ahead and doing that. I see a really good question. A little earlier in the chat around Can you request a consultation and a project at the same time? Yes. So typically, consultation calls get matched a little quicker.

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than projects, it's just a one hour call. So it's a little bit of an easier thing for a volunteer to raise their hand and say, Yes, I will go ahead and do this with you. So typically those get matched a little quicker. So we like to recommend that sessions are kind of a great thing to do to prepare for a project.

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I think I mentioned this earlier, it was around like a stakeholder interview question.

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This could be a great example of, maybe you're preparing for some user experience updates on your site, you're preparing for some stakeholder interviews, a few of the infrastructure pieces we talked about, request a conversation with someone who has experienced doing user research and say, I am totally flying blind when it comes to this topic. Can you walk me through what are the most important questions to be considering and how to prepare my team, but you can request both at the same time, there's no limit to the amount of volunteer requests that you can have active on taproot at any given point in time. My warning flag for you is that taproots services are free of cost, you will never be charged a fee for using our organization's services. We're a nonprofit serving nonprofits. So there's no financial cost, there is a time and energy cost. So only request the pro bono resources that you are prepared to act on and manage in that moment, because you will get applications from volunteers who are ready to dive in with you. And if you're not ready to respond to those applications, review those resumes, review their statements of interest, where they've really sometimes pour their hearts out to you about how much your mission means to them. If you're not ready to consider them AS a resource, and then give them the feedback, communicate with them regularly throughout the course of the project, then we recommend not requesting pro bono at that time. So keep that in mind, don't request more than what you can manage. All right, I do see that we hit two o'clock, I am okay to stay on for a few more minutes. So I'm going to I'm going to stay on the line. And I totally understand that folks do need to jump, you will receive a recording of all of the q&a that we continue going through.

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But if you do have to jump I just want to say thank you so much for joining us. I've had such a good time with you all.

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I'm going to hang out to answer a few more questions. So feel free to hang out with me. Okay, so I see another question here around how often do you need to do a SWOT analysis.

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Definitely every time you're going through any kind of strategy exercise AS an organization. So if you are gearing up for strategic planning, SWOT analysis should just be part of that strategic planning process. I also would recommend conducting a SWOT analysis if you're preparing to launch a new program, or initiative, or like messaging angle externally. Because if you're about to go big with something publicly, you're going to want to make sure you know the lay of the land, and have a full understanding of where your organization is already doing really great, you're set up for success, you have the right internal team, the internal tools, and then where you're a little weaker, and where maybe you need to protect yourself a bit more or prepare a little bit more before you make that external push. So SWOT analysis, think about it in those big moments, those big moments to prepare you for external exposure. Hopefully, that's helpful. Is there a way to think through how to ask volunteers to give when staff are afraid to ask them for money? That is such a good question, a call, I really appreciate you dropping that in. So this comes back to something I mentioned a little bit further. And actually, I'm going to go ahead and switch the slide. So you all can see our helpdesk email AS I asked this, because I do know some folks are more comfortable asking questions, one on one. So if that if you are in that boat, please just send us a message at that email and myself, Megan and several other taproot. Staff members are all attached to it. And we can get back to you AS soon AS possible one on one. But going back to this question, so I mentioned something earlier, when I was talking about email marketing, when I was saying that

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you really should consider segmentation because someone who's never donated to your organization should not receive the same communications AS someone who's financially donated, you know, five years in a row. This is the

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One thing to think about when it comes to your volunteer list AS well, because these are folks who are bought into your mission, they have served you in really, really valuable ways. Some of these might even be taproot volunteers, right? I don't know, maybe it's someone who's done hands on volunteering for you, maybe it's someone who's done pro bono. And what I would urge you to do a little bit of internal alignment around is, what is the most valuable call to action that you could put in front of these with this volunteer segment. If it is more valuable for you to get them to financially donate to you in this moment, then that is the call to action you should put in front of them. And you should really be careful about your messaging, you want to of course, share with them how grateful you are, that they have been a steadfast supporter of your work for so long through your volunteerism. And right now, in this moment, the best way that they can help you is through a financial gift.

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If the most powerful call to action is no, we actually don't need them AS much AS financial donors right now, because we think maybe their donation ceiling is only around 20 to $50. And that's not going to get us the revenue that we really need. And instead, we need to protect these these folks for volunteering at our local events, then save them and give them a another call to action to work on during the holiday season instead. For example, something I've done before is send an email to a volunteer list and say, hey, I want to let you guys know, because you're our closest supporters that our nonprofit is running this campaign during the month of November. And we are going to need your help raising this money. We don't want to ask you to donate. But of course, it's always appreciated. What we need from you is your network and your connections. We need you to volunteer your social media connections, right? Give them a comms kit for your holiday giving campaign that lets them create a Facebook fundraiser for you. That gives them templates to use

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to share out about your nonprofit on LinkedIn, and highlight their volunteer service for your nonprofit, send them a postcard, that they then you can share our package of stickers that they can spread around town talking about your holiday campaign, give them a job to do, because that's what they're used to doing for your nonprofit. They're used to doing a job if they're a volunteer, so give them a specific task. And make sure that you

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bring them in to the core goal, make sure they know that they are a part of the fundraiser team. And their participation is directly going to lead to the success of your fundraiser. Yes, fundraising ambassadors, exactly, Jessica. So feel free to you know, talk with your team get alignment on making the individual giving request or making them fundraisers themselves.

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All right. So I'm trying to see I'm sorry, if I have missed any questions so far. I know Megan and Sameena have definitely shouted out some good examples throughout.

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I see a question a little bit earlier on about sometimes taproot posts on social media looking for volunteers, we need to not be mentioned in a request like that for security reasons. So that is something that that's a tag we can apply to your account, Emily, so we can make it that your posts are not shared.

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Through taproots social channels, obviously, it's going to recruit or it's going to shrink in our ability to recruit on your behalf. But we can still send requests directly through email to potential volunteers that we think are a good fit. So if that describes your nonprofit AS well, that's something you'll just need to get in touch one on one with our help desk about so we can we can make that happen in your taproot account.

14:44:05

Okay, how do we assess the amount of staff time necessary to manage projects with these volunteers? Very good question. I actually think a taproot plus session is a good place to ask this question, because I'm going to tell you right now I have a background in program design, marketing and then people management. I don't have a background in web development.

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And, or budgeting or setting up an accounting system. Right? So there's some areas where I just have a knowledge gap. And if I need to think through the project scope for like an accounting project who volunteer, I have no idea how much time is going to be needed on my end, to manage that volunteer that accounting volunteer on a week to week basis, right? I'm flying really blind, because that's just not an area of expertise for me. So what I would do first is go to tap through and request a one hour call with an accountant who can just walk me through, what will the process look like to accomplish this thing? This like discrete project outcome that I'm looking for a volunteer to create for me and my team? What? How can I better set expectations internally for rounds of feedback? Or what the end project will look like? How can I best prepare to be a people manager for that pro bono consultant, right, because they're joining my team, I want to make sure that I am set up to be a great manager for them. And so I want to do my homework a little bit too. And so these taproot plus sessions can be a really great way to just prep yourself through a very like, casual, whatever you need it to be one on one call with a volunteer expert. So I definitely recommend sessions AS a way to prep for projects.

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I would say and just AS a general rule of thumb, some of the projects that we've been, we've seen just be a little quicker in terms of completion time for on both the nonprofit like project management side, and then the volunteer side, things like graphic design, you can get that done in a couple of weeks. And it probably will only involve, you know, however long it takes you to review a package of graphics, so maybe one to two hours, right? That's going to be like on a smaller scale of projects, AS opposed to if you're creating a marketing strategy for your organization for 2024. That's going to be a much more in depth time commitment for you, because there's so much knowledge transfer that needs to take place between you and your consultant. So for that, I probably would recommend setting aside maybe like three to four hours each week for about six weeks to work with a volunteer.

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All right.

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Is it possible to set up a one on one conversation with someone from taproot? Yes, it is possible. So I mentioned this really quickly earlier, taproot plus sessions are conversations with taproot volunteers, just like taproot plus projects are engagements projects with taproot volunteers. But we do have options to talk one on one with taproot staff members. So I don't have the link to that handy to throw into the chat right now. But

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how about contact us after we send out the follow up email, you'll have our contact details. So just shoot us a message if you think you could benefit from one of those one on one, user support calls. And we'll put you into the right funnel. But we have something called a nonprofit success coach, which is a member of our team on the taproot plus side whose job it is to get nonprofits ready to make best use of skilled volunteer resources. So whether that's a one on one coaching call with our nonprofit success coach, or we also have like small group office hours available, too. If it's beneficial to have other folks on the line, or maybe to hear what other nonprofits are thinking about, I found those small group sessions really, really helpful. So that's just something let us know on a one on one basis, when we send out the outreach, and we can get you connected with the right information. Yeah, I think I want a success coach to Genie.

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It is free to use, AS I mentioned, yeah, a lot of just asked about the price for the nonprofit success coach and our taproots services are free of cost. And we offer these resources at free of cost AS well.

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Okay, I think I may have gotten to all of them. And I feel so bad because I'm already 13 minutes over on this event, but I really appreciate all the folks who have stuck with me. It sounds like we're going to be continuing some conversations through email after this which is exactly what we want. So hopefully this is just this

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Start of our work together. And I'm really, really looking forward to just being in touch with all of you after this. I'm just gonna go ahead and take us back to this home slide so I can officially say thank you so much, everyone for joining us. We're wrapping up this webinar, but AS I mentioned, we're going to be in touch AS soon AS we possibly can. Once we have the recording cleaned up, and ready to share out along with the deck, taproot signup information, and a few other fundraising resources AS well. So please, definitely stay in touch, you'll have my contact information, you'll have the help desk information. And I really hope that this is just the start of many more taproot plus your nonprofits partnerships. From now on. Alright, I'm sending Good luck to all of you AS you start your preparations for the holiday giving season. I hope you all have a wonderful rest of your week and hopefully a good long weekend AS well. Thanks off.

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Bye now.