Strategy Panel Recording

It looks like around half of you that are in attendance, have volunteered your strategy skills to a nonprofit but we also have about 44% of attendees that haven't yet. They also have a smaller smidgen about 6% of people that said they just signed up for their first opportunity to volunteer their strategy stills. So we love kind of seeing that come in. Hopefully our panel today can give you even more insights into their experiences. You know, the good, the bad, the ugly, mostly good, I think, in tackling strategy projects, for nonprofits. So really quick with just some basic housekeeping and logistics.

On behalf of the whole taproot team. Thank you so much for being here. The official name of our panel is advice from skilled strategy volunteers. And we're really, really excited to have you all here for this lunch and learn or breakfast if you're coming in from the west coast. Today, taproot is joined by panel of some of our most experienced pro bono consultants, who I'll introduce in just one moment. But this is going to be an open conversation on the ins and outs of skills based volunteerism, specifically the donation of strategic or strategy experience, including Business Planning, Research and Evaluation and strategic operations, we'll begin discussing the impact of giving back in this really impactful way, as well as tips for successfully consulting with nonprofits.

So thank you to everyone who submitted questions upon registering for this event, we'll be using the most popular questions, we have to kick off our panel. But please also use the q&a box in zoom. To ask additional questions throughout time, depending towards the end of the second half of the event. We'll also invite folks to raise their hands and come off of mute if they'd like and ask questions or chat with our panelists. So another quick kind of housekeeping, few logistical things to add. Before we dive in, again, we are recording. So that's going to be up on YouTube and sent out to all the registration or registrants as well. And please try and keep yourself muted if you come off a mute for whatever reason. Again, we'll hopefully be able to take some live questions towards the end. If you need any kind of tech assistance or something like that, please shoot a private chat to my taproot colleague on the line. Make Gilette who is standing by are ready to assist.

So, without further ado, I'll go ahead and just start off with introductions. My name is Josh Groll. My official title here is nonprofit success coach. At Taproot Foundation, I work mainly with taproot plots, which is one of our kind of flagship program offerings many of you probably already familiar with. Some of you might be familiar with other programs that we've done in the past where we've done things like scope, pythons, pro bono marathons, even team based projects managed by our advisory services department. We've had a solid chunk of registrants for today's event.

So again, I'll take a minute to just introduce our organization given that some of you might not be totally familiar. Taproot Foundation is a US based nonprofit that connects to nonprofits with the business support that they need for free. We do that by facilitating connections with talented professionals from the worlds of marketing, HR operations, finance, IT strategy and more. So to date, we've connected with 30,000 volunteers, we've connected 30,000 volunteers with about 10,000 unique social causes for pro bono services, totaling over $300 million in value. The pathway for finding volunteer opportunities through our organization is taproot plus, which is our free online matchmaking site. And Meghan will drop a link just in case you don't already know, to taproot plus down in the chat for any anyone who's interested in learning more or maybe if you're interested in finding a skilled volunteering opportunity to donate your skill set on.

And now I'm really delighted to actually introduce our speakers for today's conversation. I'll start off with Ben Clayman, who is a management consultant focusing on strategy design, project implementation, and change management. Most of his career has been in the healthcare sector. He likes to keep things simple and is known for translating complex technical details into easily understandable concepts. Dave has an MBA from the Kellogg School of Management at Northwestern University and enjoy spending time with his family distance running. Same there been. I'm a distance runner as well and watching old black and white movies, we also have that in common. So thank you, Ben, for for joining us today. Go ahead and say hi to everyone.

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Hey everyone, it's nice to be here looking forward to your questions and sharing the good.

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Thanks then. Our second guests that I'm going to introduce today is Kate cruise Inga, who is a versatile leader who has held roles across strategy operations, finance, and people functions over the last 15 years. Frings friends and colleagues say she's the ultimate high capacity swiss army knife, but she delights most in roles where she can build a transform an organization. So Kate has worked at leading companies in emerging startups including including Dropbox Teach for America, Kaiser Permanente, parallel domain and Global Citizen year outside work. Kate lives in Oakland, California is an outdoor explore amateur theologian, wife and boy mom and voracious reader. She holds a Bachelor of Arts in Political Science and International Studies from the University of Wisconsin, and a Master of Arts and evangelism and leadership from Wheaton College, graduate school.

And last but definitely not least, we'll Kate I'll let you say hi to everyone. getting ahead of myself. Hi, nice to meet ya. Thank you Kate for being here. Last but not least, Paul nori is a financial services professional founding and managing noble equity fund LP, a healthcare focused hedge fund and noble Advisors, a registered investment advisor. In 2016, he founded a two car Foundation, a private foundation that focuses on child empowerment and increasing the utilization of free and accessible mental health services. He's volunteered with taproot since 2017, and has also volunteered directly with other organizations including Big Brothers, Big Sisters, New Friends New Life in Jonathan's place. Paul graduated with a BS in management from Rensselaer Polytechnic Institute in 2005, and an MBA from Yale in 2017. So Paul, say hi to everyone. Thank you for being here.

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Everyone, glad to be here.

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So the work that Taproot does, all of those impact stats I rattled off for you just a few minutes ago, truly would not be possible without the generosity of our volunteer community members. These three speakers I think, embody the probono ethic of kindness and service. So thank you all so much for for joining today. And with that, I think we'll go ahead and just jump into some of our kind of first kickoff questions. So kind of a more icebreaker type question to get us going. If you had to describe skills based volunteerism in one word or phrase, what would what would it be? What were with that word or phrase being? And I'll let you think about it for a second. And then whoever, whichever one of our three panelists wants to be brave and go in for the first slice of cake, and answer the question. Go ahead. Then you came off mute. So

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yeah, if it's chocolate cake, I'm all in. i If you needed just one word, I'd say altruism. If I can get three words, it'd be sharing your knowledge

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and altruism and sharing your knowledge. It's got a word and a phrase. Or what do you think? Well going fulfilling, I like a

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I would say either connection or impact.

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connection or impact? Yeah, fulfilling connection impact? Um, was there an answer in there? I mean, you heard from someone else that you maybe didn't think of already or surprised you or also speaks to your experience.

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I'd say impact is

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something later on in the panel, but it's one of the things that I keep seeing every time I've had the chance to volunteer with organizations and just seeing how broad of a of a scope that you can bring to the table and then even just little micro differences that you can make in an organization's life or in an executive directors life, you know, can be very, very simple things that most of us would take for granted, but that they might not be aware of or just can help them because a little bit the end factor that is so great. And, Paul, to your point about fulfilling, it's really rewarding to be able to say I totally agree to be able to say, look, I spent all this time and money learning stuff, and either MBA school or school of hard knocks, and let me save you some time save you some effort, save you some energy, because most nonprofits don't have enough of any of that. And so if you can help them with that, that's super fulfilling.

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Yeah, I mean, I think, you know, I've worked on a bunch of different types of projects. And I think, well, a lot of them have been like, at the earlier stage, kind of ideation, of, of what they're doing. And it's, you know, what's cool is different people having the passion to do to serve all these different needs that needs to be met. And a lot for a lot of people there, they're either starting at an idea, maybe they have an initial population in mind. And, you know, sometimes you'll do these engagements, and they work out really well. And you mesh really well together. And the nonprofit, you know, kind of keeps moving forward. And, you know, sometimes maybe it's not that linear, but I think anytime you're involved with people who have passion for something, and they and they see that someone who doesn't even know them is willing to put in this time and effort, that it helps them at least, like have that motivation and say like, oh, look, other people also want to be engaged on this. And that, you know, that's really cool. Yeah.

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Yeah, those are, those are really good insights. Ben, you said, something that, that really intrigued me, or something that I've seen a lot in my experience, which is even just really small things can make a big difference for a nonprofit leader. And I like to emphasize that because sometimes we hear from skilled or prospective skilled volunteers that are like, I don't really know, if I'm seasoned enough, or, you know, I have enough skills, you know, under my belt to be like, leading and guiding someone else. And something I like to remind volunteers, especially when it comes to business strategy is, in many cases, nonprofits are led by passionate people who, but who, who maybe don't have any kind of background in business at all, and they're kinda you know, this is kind of their baby or their their big project or something like that. So you would actually be surprised at how, you know, simple some advice or support you could give them actually is that that would help build capacity of their organization. Even if you're, if you're afraid of dipping your toes in the water and not necessarily thinking, you know, you can help lead a nonprofit organization. There's there's many, many things that seem very second nature to people in the business community, that nonprofit leaders need to know of, or maybe need access to, or maybe need to know how to navigate that they don't. And so you'd be surprised. And you know, you're like, Oh, well, that that was, I helped them in a huge way. And it was much simpler than I initially thought it was.

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Totally, it can be as simple as just listening, and reflecting back and then helping me being one gal, really just clarify her thoughts. And all we did is prioritize some things in a rank, you know, what's what's most important? If you get that done, then what would you do next? The second year kind of thing. And, you know, even that was helpful. So it could be as simple as that. And then obviously, if you're talking to someone that's got the bandwidth or the room, then yeah, you can help them build it out further, but sometimes it's just the simplest thing that they needed. For us that might be something that we just do day in day out as part of our quote unquote, work world. But then for someone else, just having that external perspective can be a really validating and be helped them just shave lots of churn out of their day.

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Yeah, yeah. I love that. Yeah. Paula from Project affinity. is in the comments. She's saying yes, definitely. Your polar or Kate? Does that speak to your experience at all? Or do you have any kind of what what was it like kind of first jumping in to doing pro bono I guess?

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Yeah, for sure. Um, I think like often you are working with an executive director or the member of a leadership team. In my experience, a lot of the challenges were around working with their boards or their donors, and a lot of times their board or their donors are folks who like live and breathe and work in the private sector. And in sometimes they're more experienced with like the new nuances of nonprofits, sometimes they're not. But in most cases helping, like, do some translation, similar to what Ben was saying, is really, really helpful. Like they're not expecting to see, you know, something that's like a softer pitch deck, they're expecting to see like ROI and metrics, they're expecting to see financial models, and they're looking for certain things that look a certain way. And so helping them tailor things. So it could look more like a business stack or a business problem. So that they can get the most out of their board get and get the right story in front of their donors ends up being really, really important for them. And also where it's not easy to translate maybe or you wouldn't want to because the nonprofit is a different model. And a different way of operating. Being able to provide some, like helpful translation is is also something that's helpful. So as somebody who maybe has seen both sides have some of you have worked in nonprofits or assisted nonprofits more, so you kind of know, this versus that. I know, in my career, that's been very helpful to me, since that worked in nonprofits and, and private sector and in government, I can kind of help connect the dots and translate.

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Yeah, Kate, I love that, because you brought up some you brought up something gets critical in the nonprofit world, which is kind of the relationship to funders. In in many cases, as you know, like I said, nonprofits are led by, like, really passionate, people who are doing this kind of out of the goodness of their hearts are because they love it. But they're, they're having to pitch and petition people, you know, with resources that are kind of in this world, professional business, strategy, and consulting, who've all gone to business school or something like that. And just being able to help business a ties a pitch, or, you know, adding in extra resources that they're going to need, or clarifying language is a, again, something that will come second nature to anyone who's matriculated through these industries, that maybe a nonprofit just just does not know about that, they're now going to go into that pitch meeting like a lot more confident, because they know, okay, these are some of the questions you're gonna get. This is the language that you want to use. That in and of itself, is is really, really impactful. Or fulfilling, as Paul, you'd say, and it's not, you know, it's just using kind of like basic business acumen and knowledge that that you might have. So, I'm also interested to hear from you all about, you know, Kate, you already started going into this a little bit, like a specific project or experience that each of you had, with a nonprofit that you're particularly proud of, or, you know, that made a huge impact in that nonprofits ultimate trajectory. Can you already touched on some kind of specifics of you know, that translation aspect, it's really helpful for nonprofits? But I'm interested, you know, Paul, or Ben, do you have any specific cases that you'd like to highlight as well, that kind of make this clear for everyone, especially if they're for that 44% or so that happened engaged on a nonprofit project yet?

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Yeah, I mean, I guess for me, one of my projects was working with a mental health organization that was targeting a specific condition that, although it's not rare, it's actually not addressed by any other NGOs. And so, I think, you know, what attracted me to it was like, the opportunity to make an impact was really big. And that actually ended up being a kind of a multi year back and forth between me and the founder, he had a lot of ideas in terms of different ways to bring information to people, be it through, you know, workbook videos, just information on the website, you know, telling people where they can go to find more information eventually, you know, wanted to do podcasts. And, you know, I think we would go back and forth on like, well, you know, I really think that this approach would work I, you know, I would come and say something like that, and then he would, you know, he would give me his feedback on whether he agreed or not, and actually, at a certain point we had we just kind of Morenstein i and we didn't talk for you know, a few months went by and, but then he got back in touch with me And he, he said, Okay, well, you know, let's pick, let's pick up the ball where he left off. And so I think especially in, in this kind of area, nonprofit when it's early in the ideation there, there is that kind of, like I said before, like nonlinear trajectory, and the two of us do get along, it's just, I think in order to make significant progress and get to the right place as to, you know, where that nonprofit should be, and, you know, how they will be most successful and moving forward? Yeah, sometimes it takes a lot of back and forth and people on both sides conceding one way or the other. But, yeah, I mean, it's been a really fulfilling project, because he is reaching a lot of people and, you know, together, we came up with what would be the best ways to go out and find these folks.

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Really good. You're describing something that I like to hit on, which when we're establishing expectations for how pro bono projects run, we'd like to tell nonprofits and skilled volunteers in particular that they should, they should structure and view the engagement just like they would a for pay engagement. That's our golden rule or pro bono. And that's how we think the best outcomes are secured. So we tell nonprofits, like, you're gonna want to give your school volunteer, like direct and honest feedback, you know, about what it is you're doing with them. I think the attitude we see from some nonprofits is, well, they're donating their services free, so we'll just be happy with whatever kind of whatever they produce for us. Right. And we actually try and discourage that, you know, as we understand why nonprofits might think that, but you know, to a certain degree there, there is no light without heat, right? There needs to be, you know, some certain point of disagreement or questioning about the ultimate deliverable you all are working on. So that you actually are able to make an impact. So that right there, I think, is exemplifying like one of our best practices, which is treat every project, like it was a four page project for still volunteers like this is regardless of whether it's for pay or not, it's something you can put on your CV, it's something you can put on your resume. So you have to think about that. But we oftentimes tell nonprofits, look, the skilled volunteer reached out and wants to help your organization because obviously, they like what you do, they want to create something or help you reach reach your goal. And they can only do that, if you're honest with them. Or, you know, if you don't like the direction or way something is going, you have to tell them that they in most cases, the volunteer wants direct direct and honest feedback. I don't know if that resonates with anyone else. But you touched upon it there and talking about your your engagement. Yeah, Ben was gonna hit you anyway about, you know, what particular pro bono project was particularly impactful or that you want to talk about? Josh, I

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just wanted to build on what you were saying a moment ago, I think sometimes the people that I've worked with in some of these nonprofit organizations are really conscious about not wanting to offend you as a volunteer or waste your time as a volunteer. And so I've found it, for me anyways, to be helpful to have interjected into our conversation or over the course of an engagement, just check ins with them like you would with your boss, or any people you supervise at work. Just say, here's this, you know, we just talked about X, Y, or Z. Is this on point? Is this what you're looking for? Is this helpful? Is this something that you think you could use? Do you think your board would find value in this deck, you know, if you're creating a board deck with them, or whatnot, and that makes it a little bit easier for them? It kind of opens the door for the the executive director, whoever you're working with at the nonprofit to say, Well, yeah, I like this part of it. But you know, our board doesn't really do this, or, you know, we don't have the resources to do this much work. So can we scale it back? And it's a way to invite them to give you some of that feedback if they're a little bit shyer, or whatnot. Some, you know, some, some folks are super upfront that just be like, Hey, Ben, this is this is nice, but I'm not a $3 billion company. So can we dial it back a stage? Picking a favorite project is a bit like asking who your favorite child is. So I think it's it's maybe not quite quite something I would be able to answer that way. I think one of the things I've seen across so many projects is just how similar nonprofits are, at least the ones that I've worked with in terms of they're all superstretch they're all looking for any little bit of help. that will really add value. And so if we can bring them just a little bit, it really amplifies their work, whether it's saving them a little bit of time, or helping them focus their messaging or helping them, you know, one project, I helped them pick a technology tool that would help them communicate internally. They didn't have the time or the bandwidth or the expertise to evaluate. So I helped them with that. I mean, others, it's, you know, it's building building runways for three year projects, or, like Kate was saying a board deck or engaging with their own staff, how do they figure out how to get the best out of their staff, things like that. I mean, whatever it is, it's all super valuable stuff that we might take for granted. Or you might have whole divisions that focus on that in your own companies. But these are usually folks that have a team of one or three at the most. And so if you can offload some of their work or simplify the ask that they need to make to their board or their their staff, and really pinpoint that for them, that just adds so much value. It's just great to see them, then be able to make more progress faster, and cut through a lot of the noise. Josh, and I kind of cheated you on your question. No, no,

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I love it. You're, again, you're touching on something that I think is very salient for anyone looking to do pro bono work, which is nonprofits oftentimes are working in an environment of scarcity. Then like you said, you know, there might be at companies, entire departments that are built out to tackle a certain issue, and a lot of lot of nonprofits, especially in their first few years, you have leaders wearing, you know, the executive director is also the head of HR. Right, that's one of the most traditional kind of double ups that that happens at the beginning of any organization. Yeah, so I think that's all incredibly on point. Kate, you talked a little bit in your prior answer about and, you know, experience you were having kind of translating, you know, these these kinds of nonprofit operations into businesses or consultancies? Can you give us some more examples or things from your own experience of the types of engagements that you had that were particularly impactful?

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Sure, sure. Um, so I would say, you know, I can thrive on this. And I can actually tackle, like I said, crack had a note in the chat about like, wanting to do broader strategy. But it seems like 90% of the projects, especially now I'm sure have to do with raising money. So I can kind of tackle that from all sides. Often, when somebody says they want to raise more money, it's because they have an idea of a strategy they're going to tackle, often, they're not coming to like an outside person who's totally new to the org, to help them set their strategy. Because just like you wouldn't necessarily like pick someone up off the street to come into your company. And just like, help set your strategy, it's going to require like lots of hours being really deeply steeped in this having all the business context, it's one thing to hire a super specialist from McKinsey, it's another thing to just grab somebody who's a generalist, which is probably why you don't see that, or they're using their board or their staff in that capacity. But often, when they say they're trying to raise money, what they're trying to say is actually they're trying to flesh out their strategy or figure out how to get from A to B. And that's where like, if you're helping them raise the money, you're probably also helping them refine their strategy. And that's what's been really gratifying for me, like one of the orgs I worked with, had started serving, like, I think three or four times the number of people that had three or four years prior like pre pandemic, but they hadn't grown their budget at all, just because it felt like austere times, not not appropriate to grow their budget.

But it's like they were like stretched to the brink, people were working 8090 hour weeks on their team, as you can imagine, like they just needed to do some things to invest to actually support this broader population. So being able to work with them to say, Okay, this is how you set the strategic narrative. This is how you help cast vision on like, where you're going next. This is what your strategy should be. And then your fundraising flows from the strategy. So helping them actually cope, like create that strategic narrative, just the same way you would set like your two to three year vision in a corporate board that can get your board the sense to like, these are the opportunity unlocks, these are milestones. This is the funding or the investment required. It's not that dissimilar, it's just you'll use slightly different language. In that I think that's where the nonprofit kind of translate it back into nonprofit ease, I suppose for like donors and things like that. They tend to have the expertise to do that. But I would say like, often when folks say that they want to raise more money, what they actually have is like a strategy. They're not fully ready to operationalize or don't know how to translate into something that can be funded. And that's where you can actually provide a lot of business strategy value. They're often sometimes they are, I've definitely helped with like grant writing, like helped me find the right grantor and like, help me write the grant because I have that background. And they they need nonprofit volunteers for that. But oftentimes, it's just abroad, I'm going to need to raise more money, because I think I'm going this way. And I need help refining it.

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Yeah, yeah, you hit on something really big there. So my, my job here at taproot I'm very external facing towards nonprofits. So I have a lot of one on ones with nonprofits kind of preparing given to us pro bono are advising them on the best way to make a pitch for pro bono services if they're going on taproot plus, and one of the biggest things when people sign up for those calls is we need help with fundraising, we need help with fundraising, we need help with fundraising. And then so I always try and play that role that we kind of talked about earlier, a little bit on my own of nonprofit therapist, of trying to, you know, drill down on what their needs are. So we can get something a little more refined, so that we can actually take that to the marketplace, and actually pitch a professional like what have you. So oftentimes, I'll tell them, you know, if you come to our marketplace and say, We need help with fundraising, you're probably not going to get a lot of interest. What we need to do is find out what part of your actual, like strategy is not working? Or where specifically doesn't hurt? Why? Why haven't you been able to raise the funds that you need to, and then a lot of cases, then they start to realize that almost any project they pitch, could be a fundraising project, depending on how they're using the deliverable. The graphic design project could ultimately be a fundraising project, depending on how you're using that deliverable. So usually, by the end of those conversations, I tried to get it whittled down to something more like, Okay, what you need is some stakeholder research to figure out where exactly you should be making pitches or something like that. So just as a heads up, you'll see a lot of that, I think from from nonprofits that Kate was talking about, then you look like you want to jump in, and you haven't Yeah,

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just just I, you said basically what I was just going to say, but just to tease it out a little bit more, I think in terms of the, you know, almost every organization I've worked with, needs money to do what they want to do. And it's about helping them tease out where they think they're gonna get that money from, and not that you have to do the social media posts, or you have to go to places and hold up a sign that says, Give me money, but that you can help the organization figure out what's going to get them the biggest check the fastest. And what can they really do given the resources they have to can they activate their board, can their board solicit donations from their own companies or their net board people's network is something that the nonprofit is going to use some sort of social campaign, like on Facebook or whatever other social media platforms they travel in? Is this some sort of in person thing as a strategic thinker, you can help them walk through? What are the pros and cons of these different approaches? Like Kate was saying, is it a grant writing thing or whatever? And then that's where they can get a little bit more traction as far as, okay, where are we going to spend our precious resources to go after that money? And then it's, you know, like, Josh, you started out saying, it's, it's up to you to decide how far you want to go with that. If you feel like you're a fundraiser and you want to lean in, I'm sure they'd love to help. But if you feel like you just want to stay in the in the strategic space, then it's perfectly fine to say, Okay, this is this is my area of expertise, amount of fundraisers, so I can help you get this far. And then turn you back over to the team at taproot or some other organization that you might work with to take you next week.

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Yeah, yeah, I think that's, that's, that's right on the money. So we've already gotten a little bit of this, I think, just in our conversation already. It especially in terms of that scarcity aspect that a lot of nonprofits are working in been, I think you've said, you know, there's just a big difference in terms of designing solutions, because you can't design like, a $50 million solution for a nonprofit that's working with a budget of like, maybe a quarter of a million dollars or something like that. In you all's experience, what are some of the biggest differences that you've noticed about business development strategy in the corporate world? Versus strategy for for a nonprofit that maybe if you're talking to someone who hasn't done a project or something yet, like, what do they need to look out for like what's a huge kind of difference that they need? They need to be aware of? While they're Jumping into work with a nonprofit

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play and I mean, a lot of a lot of nonprofits will get their funding from, you know, different types of sources. So someone will get it from like government grants, private foundation grants, service revenue, and then individual donations. And, you know, when you're, when you're starting a business, you, you know, you think like, well, you know, is this a is a product or service that there's a need for and do I have a unique way of selling this product or service, but I think a lot of times, for the nonprofits, they just think that while this is a good cause, it's it is something that needs to be addressed. And so it's really just a matter of finding money. And, you know, it's a lot more complex than that it's there. There are costs of business of doing everything and nonprofit land and for profit land. And so, you know, if you want to offer something, and it's super expensive, then you have to find out how you're going to fund that super expensive thing or they want to offer. So sometimes I think there's a disconnect that are kind of, I don't know, maybe it's some ways putting the cart before the horse. But that's why, you know, some, sometimes some of the nonprofit's I've worked with, you know, they want to start from the beginning, they say, like, Well, can you help me put a business plan together, and then I think that's great, because it's an opportunity for, you know, I'll take a few hours to research and understand their particular cause to find out what they're doing and all the dynamics of that. And then we have a call or an email, and I send them an email with like, 10 or 20 questions, clarifying certain things about their particular sector, and then we're able to put together a business plan and see if it, you know, if it makes sense for them, and then and then they can see, okay, this is, this is what's gonna be required of serving this group in this particular way. Am I ready to do this? Or am I ready to go out and do this and, and step function like? What, you know, what should I be doing first, to get to that end? So yeah, I guess, just pretty much. That's what I have to share.

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Yeah. Yeah. Ben or, Kate, in terms of the differences between the these two worlds, aside from what you've already mentioned, which is or is there anything else you think it'd be good to highlight for? For people on the call?

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Yeah, I would say like speed and pace and just being like, super gracious, right? Like, the number one thing I noticed in my own careers, when I moved from a nonprofit to the private sector, how luxuriously staffed suddenly, things were. So like, that's been eye opening to me. So a lot of us are used to like having heavy workloads. I'm not saying I'm in private sector, we don't work a lot of hours and have a lot on our plates. But it's at another level in nonprofits. So if somebody takes 48 hours or even a week to get back to you, they are probably actually drowning. And it's not assignment, they don't respect your time that they don't want to engage. There may just be like a big event this week, and it is all hands on deck. And so just asking questions to especially when you kick off about like, what are reasonable turnarounds? Are there any kind of like blackout weeks where y'all might go radio silent? Like, what is the best way to stay in touch? Right? Like, is it email? Or like, do you need me to text you do we want to have a recurring call, so we just have a half are protected. So I can stay on blocked, bi weekly or something like that. So in being clear about your own constraints to let's say, you are between jobs or between gigs, if you're a freelancer, or you you know, you're about to have surgery in six weeks, being clear about like, this is the defined period of time where I can help you I want to make sure we get to the finish line, I'm going to need back and forth. Is that going to work for you in this season? Are you hoping this actually stretches out? over a longer period? In which case maybe I do part one, and there's a different volunteer for the second tranche of work. And so those are the big things that kind of stick out to me is just like really realizing that part of the reason they're coming to you is they're short on capacity, but that has this other effect that you know, as much as they want to give you a ton of their attention and be really gracious about your gift of time, which is phenomenal. There are challenges.

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Yeah, yeah. Kate, I love that then you You, You came off mute. So yeah, no, I,

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Paul and Kate have have summed up so much I just stuff that I've seen is has to do with the infrastructure, and the constraints that most of the nonprofits have that in the corporate world, it seems like those constraints are just it's such a different level, you know, you're in bigger corporations, or even small corporations, you see constraints at like, multi million dollar level or a million dollar level and at the nonprofit, you're talking about 10s of 1000s of dollars, or 1000s of dollars for some of the smaller ones. And so you realizing what you're working with. And then the infrastructure that might be in place at a corporation, you have all of these tools and technologies that are just baked in at a court that you might not have at that nonprofit, you know, you're you're you've got people that might be using different email systems, and they don't have a shared system to share documents or anything like that. So you're introducing things like Dropbox, or Google Docs, or whatever your version of that is, you're helping them to set those just things that we take for granted, you know, using PowerPoint, it's just stuff that you might take for granted in the corporate world that a lot of nonprofits may not have in place yet. And so part of it is just understanding what is their what is their baseline? And how can you help them achieve with their baseline, and sometimes it's layering on free tools that you can get at and other times, it's just figuring out how do we work with what they have, whether it's a tool or their capacity to use a tool, that kind of thing?

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Yeah, I love that. Because that just reinforces an experience I commonly hear and advise both volunteers and nonprofits to prepare for, which is, you know, if you if a nonprofit poster project, and you both schedule a meeting to kind of talk with each other about it, I tell them, most of that meeting is not even necessarily dedicated. So the question of, okay, can I actually do this project? It's dedicated to, okay, how is this going to run? What are the logistics? When are we going to meet? What is the timeline actually look like? Is there a massive gala coming up in two weeks? Where it's going to be all hands on deck? Is there surgery or something like that? Should we block off a designated time? Are we emailing each other? Are we texting each other? Like, what are communications preferences? Like? I've heard from most people that like that initial discussion is kind of more about laying a blueprint than it is like a traditional interview, you know, where they're really vetting skills and experience, right? Obviously, you want to do that. But that's a really big part of kind of having that initial touch base with a nonprofit. We've had many cases in which, you know, the volunteer was kind of a perfect fit, but for logistical reasons or timeline or something like that, you know, they they said, well, we'll catch you on the flip side, hopefully we can. We can work together sometime in the future, but it's just not going to work. So it's not even the question of okay, can I actually do this work? A lot of times, it's, it's the question of thinking through the planning, because when when projects do go under or kind of fall off the plate, it's almost always with regard to the planning that or communications preferences that weren't set properly, or something like that. It's not even it's not necessarily, you know, the volunteers commitment or ability to actually do the work. That's the problem. It's really just like communications preferences. It's always the small things that derail projects actually. So Kate, I love that strategy of, of let's go ahead and like get something on the calendar when we're both free is a really, really good strategy we like to recommend. I'm interested in hearing kind of as we we start to enter the wrap up phase here. Is there anything that surprised any of you, that you just weren't expecting? When you when you started doing pro bono work? Or that was a curveball? Maybe something that you weren't totally expecting? That's that's different about a nonprofit? Or doing this kind of work?

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Yeah, I would say like for me, it's done on both sides. Like sometimes it was a surprise like you said you needed this but actually, when we dig in, you needed that and like being able to be humble and gracious enough to be like, I can do these things, but I can't do that. Let's let's use my network to find you what you do need, you know, people are taking their best crack, but sometimes they'll be really excited to kick start your day again, and maybe you're not the right person, but I think like it's also kind of fun and sweet sometimes because you all have great networks, you probably do know the right person for them. So being able to kind of like broke our match and get more people into volunteering has been kind of like a sweet curveball sometimes. I would other also say like sometimes it's prize me like, what a night and day difference, like a tiny amount of volunteering can actually make like, I wrote one grant for an organization where I was like, Oh, this is a long shot, they got it. And it was like literally the difference between them, like quadrupling their staff, and like having like five years of funding because they got like a long term grant. And it was like, I maybe spent two, three hours with them. And like, this isn't supposed to be like, pat on the back for Kate. But it's like you all could have that kind of impact, where like, sometimes somebody literally just has no experience. This was like a farm manager who had never written a grant in their life. I'm pretty decent at grant writing, I help them write one grant that was pretty aligned that I found for them and an hour of searching and two hours of writing. And it gave them like a five year runway. So they don't underestimate how like a small amount of time could have a really outsized impact, if you're plugging a hole that just no one in their org can plug.

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It I love that. That just reinforces everything we've been we've been talking about here. But it's again, things things that might seem really basic to you. And I'll say if anyone on the line here is has any experience grant writing or grant researching, oh, boy, will you be popular. If you decide to do any any pro bono for nonprofits, that's easily one of the most sought after things, positions that we have trouble filling simply because it's just such a finite resource of people who who are not familiar with like the grant writing process and what that looks like it is So Kate, I know you come from a background or nonprofit so you you have a leg up there. It's such a unique skill set. So if it if anyone on the line has that skill set, see me after class, because you are you very much so desperately need it. Yeah. So as we kind of wrap up here and looking at some more questions that we have that have come in. I'm interested in hearing from you all. Are there any resources or things like that you you found yourself using that you could advise other skilled volunteers that they should look into? We did get some some pre submitted questions about this of, hey, do you do you find yourself using any tools or resources and helping nonprofits like IDEO? Or in any kind of database or something? Like I guess this is kind of asking something more tactile? You know, do you have any tips or resources that you'd like to share in terms of like tools or software that you've you found really working with a nonprofit context or something like that? Get a look through some of the questions that were looking at while while you all think about that, and it's okay, if you're like, Well, not exactly sure if this would be applicable, but I'm always looking for new, new resources. Yeah, go.

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To me, I'd say like, more important than the tools is getting, like a really in depth understanding of what these organizations do and like the, the sector that they're in, because, you know, I'm in finance. And I usually cover healthcare companies. And so I have some, you know, that's kind of my area of expertise. But when I, when I dig into what all these little nonprofits do, it's just, you know, you have to get really specific about about the population that they serve, and how well they're served already, and, and all these different things. And then an answer to your to your other question about, you know, if we were surprised about anything, I'd say that what was like a happy surprise to me is so like, you know, I got out of college and I had a like an interest in nonprofits. A lot of the nonprofits I looked at were, and like, associated myself with we're kind of largest nonprofits that served various causes, you know, but being a part of taproot, you get to meet so many smaller nonprofits that have a passion for something that you might not have thought about before. And so that that, to me has been the, you know, the biggest surprise working with you guys. Yeah.

17:29:12

This is maybe new for a lot of nonprofits. And Paul and Kate, I'm super curious if you guys have used this with any of your nonprofit engagements yet. But what about using something like a chat GPT or a bard or being chat At or, you know, pie or anything like that using AI to do some of that scoping out of the nonprofit and their specific sector, or their niche within a specific sector, or the ways that they could find relevant grants or things like that. Have you guys used any of those AI models to do any of that stuff yet?

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Not me, I haven't gotten the hang on.

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I haven't done it. But I should. I mean, like, I think like I talk all the time amongst like the early stage companies that are VC portfolio because like often you're you're wearing many hats and like chat GPT like, I would not use it to like run your right your fundraising communications, people will know a bot is asking them for money. And then like I go well, but it can kick start things for people, right, because it is going to the web for like good examples that then you can polish soften up, customize make more human so it's it's a Kickstarter and a time saver, I would say. And like my own journey, I found it incredibly helpful to like reduce legal bills, your lawyers are still your best friends, like use it for the things that are really big, getting high stakes and important. But if you need like a first draft of a common template that probably does exist on like a Nolo website or something like that. Or you're just trying to figure out what the nuances would be to like go operate in the state what the regulations are, it can summarize them pretty well, to help you make some quick first decisions, but then you would maybe flesh out with a formal legal team down the line. So those are some things I've seen. It's also great sometimes for like developing like outreach or recruiting templates, if you're if you're hiring, I've definitely use that in my journey. But I think like encouraging them to use as like a kick start is great. And like GPT for I think, is 20 bucks a month. So like even if they just have one license, but like, you know, that comes first holds, and then like assist others with it's pretty high ROI for pretty low costs.

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Yeah, I've found it to be super helpful for those kinds of things, and just for summarizing lots of different researcher information out there. And so you, thank you, Kate, for for suggesting those. But Josh, to your point as far as tools, that would be one that I would start with, you know, and I think he called it out one of the comments, but there's lots of other tools and Paulette said that the tools are sort of secondary to what the organization needs. And so it's It just all depends. Favorite answer.

17:32:13

I do want to invite anyone I know, we've been monitoring the q&a and asking some questions that people have submitted. But I do want to invite anyone you know, if someone wants to come off mute and introduce themselves and ask a question, I know we have another minute or two, before we wrap up, please feel free to you know, raise your hand or come off mute. And ask a question. Just you know, in speaking to those AI tools in particular, I know I've used them when consulting with nonprofits, to suggest to help them kind of find the right words. For for their to describe their own need. In a lot of cases, they're the biggest hump that they're trying to get over is, okay, we know we have this need, but how do we? How do we describe it in a way that's coherent? And using language that people in professional services might be more familiar with? We don't know what this is called necessarily. And you can I just walked through nonprofits showing them like, hey, use this as like a base for when you're coming up with need statements, or, you know, if you're like, we know, we need SEO Help, but we don't, how do we describe what kind of SEO help we need? I'm like, Well, you can, you can ask, you can ask Chad gdb to kind of describe the basic steps in an SEO evaluation. And I'm like, use some of that, you know, in your so I, you know, I've used it, at least in that part of the process to get people to you to make a compelling pitch. And it's been it's been very, very helpful. Um, when nonprofits See how easy it is, they're like, Oh, I'm gonna use this for other stuff, too. But I do also condition it with the advice that they use it maybe as a foundation. You know, like, like Kate said, you never want to be writing pitches with it exclusively. But yeah, I think we were able to get to most of the questions that came up that were pre submitted and asked, and I know we're kind of just right at time, and I want to respect everyone's time so we can go ahead and wrap up. I want to give just another big round of applause. And thank you to Ben Paul and Kate for for being here. We know you You know, taking an hour out of your day to do something like that. This is this is a big deal. And thank you all for attending. We hope if you're if you're already volunteering, that you continue to volunteer, we'll submit some information to you as just a follow up. If you're interested in more information about tap root plus, do you want to find a project to work with a nonprofit? On you can do so right now? That marketplaces is all always open for you, as a as a skilled volunteer, and then we'll have a recording of this. If you have people in your network, please, please boost it out. But yeah, Ben, Paul, Kate, if you feel have any kind of final thoughts, or anything you'd like to leave us with? Thank you so much for being here.

17:35:19

None from me, other than thank you all for being here. And being willing to give your time all we got in this life is dollars and days and give us time is a big thing. So thanks for your enthusiasm and hope you all find a great project and feel free to connect me on LinkedIn if I can be of help.

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Yeah, we're going to share everyone's LinkedIn information as well as part of that follow up. So if you have any more, if you're like me, and you think of brilliant questions at 2am, the night after, you would want to reach out to someone you could do that as well.

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I would just say, you know, you guys are doing a great thing at taproot. And, you know, just keep on doing it. Just keep on linking up these nonprofits with the people who want to give their skills. I think it's awesome. Thank you,

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just echoing that. Thank you. I appreciate you guys being here willing to volunteer and thank you taproot for making those bridges happen.

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Thank you all. And with that, everyone, have a good Thursday. Good Friday Eve. Have a good good rest of your week. And thank you so much for for being engaged. This has been great. Y'all have a good one. Bye.