



Volunteer Support for Nonprofit Strategic Planning

Taproot Foundation | March 2024

On The Agenda

- Intros
- Meet Taproot
- What is a Strategic Plan?
- Why Strategic Planning?
- What Does a Strategic Planning Process Look Like?
- Skilled Volunteer Support For Phases of Work Through Taproot Plus
- Q&A





Meet Taproot

Taproot empowers mission-driven organizations by mobilizing skilled volunteers to advance resource equity.



What is a Strategic Plan?

A Strategic Plan...



1

Aligns Board
and Staff



2

Outlines Key
Priorities



5

Blueprints the
Acquisition of
Resources



3

Is Systematic,
Structured,
Data-Driven



4

Is a Staff
Management
Tool





Why Strategic Planning?



Answer Core Questions

- Where are we?
- Where do we want to be?
- What is in our way?
- What do we need to do to get there?



What Does a Strategic Planning Process Look Like?

Discovery:



Information Gathering/Environmental Scan:

- Data: Programmatic, Financial, Trends
- Identify Stakeholders
- Gather Data In Person
- Board Evaluation

Back to Basics:



Mission, Vision, Core Values:

- Propose Mission Statement
- Propose Vision Statement
- Propose Core Values

Who Does the Work:



Working Group/Start Plan Committee:

- 4-5 Board Members, ED/CEO, Staff, Community Member
- Consultant Facilitator
- Keep Meetings 45-90 Minutes
- Create One Page Summary

Think Big:



Goal Setting:

- Identify One to Two BIG Goals
- Keep Smaller/Annual Goals in Mind

Get the OK:



Board Retreat:

- Report Out From Working Group
- Review Your Big Goal(s)
- Create "Mind Maps"
- Detail Next Steps

Crafting the Plan:



Structuring:

- Executive Summary/Table of Contents
- Working Group Summary
- Post Board Retreat Work
- Pyramid

Follow Though:



Implementing The Strategic Plan:

- Press Release
- Create Dashboard
- Put Plan on Website



Skilled Volunteer Support For Phases of Work

www.taprootplus.org

GET THE SUPPORT YOU NEED

You make the world a better place, but you can't do it alone.
Taproot Plus matches you with skilled volunteers who help you build a stronger organization.

[GET STARTED](#)[READ FAQ](#)

Join the Taproot Community

- Free of cost, unlimited accounts for your staff or board
- On-demand consultations and multi-week projects, access to Taproot's full suite of corporate and grant-maker-led programming
- Access to nonprofit coaching, networking, and pro bono readiness resources from the national leader in skills-based volunteerism

Strategic Planning With Skilled Volunteers



Facilitation

Working Group
Board Retreat



Info Gathering

SWOT Analysis
Data Analysis



Messaging

Copywriting
Graphic Design



Metrics

Dashboard
KPIs

Pitch Perfect: Projects

- Describe the project you would like a skilled volunteer to complete.
- Create a compelling pitch to attract volunteers to your project.
- What preparations have you made for the project? How do you plan to implement the project once it's complete?

What Kind Of Support Are You Looking For?

* Select a category ▼

* Describe the project you would like a skilled volunteer to complete.

Projects should be doable by 1 to 2 skilled volunteer(s) over the course of 6 to 9 weeks. Include specific, concrete details about what you need.

* Create a compelling pitch to attract volunteers to your project.

Why is this project a priority for you at this stage? How would this project help achieve your organization's goals or further your mission?
Why is this project a good investment of the skilled volunteer's time?

* What preparations have you made for the project? How do you plan to implement the project once it's complete?

Demonstrate that you have the materials, time and staff commitment to successfully complete this project with the skilled volunteer. Show them that your organization is ready to implement the work that they do.

Pitch Perfect: Projects

Describe the project you would like a skilled volunteer to complete.

We are searching for a volunteer who can lead our development of a new and improved mission and vision statement that will communicate our purpose and vision to a variety of stakeholders. Our ideal volunteer partner will be a creative communicator who is ready to dive into messaging strategy with our team!

We will work together to complete the project through three meetings in three weeks. The first meeting will be an opportunity for our team to provide you with a briefing on our core stakeholders and goals as an organization. We will provide the volunteer with our existing mission or value statement and orient the volunteer to discuss our current vision and the way we deliver on it through our programs. In our second meeting, the volunteer should present a first draft. We will provide feedback. We may work asynchronously for continued feedback, and in our final meeting together, the volunteer will deliver the final, copy-edited version.

Pitch Perfect: Projects

Create a compelling pitch to attract volunteers to your project.

Making sure our mission and vision statement is clear, concise, inspirational and speaks to all our stakeholders will be the foundation of our new strategic plan. The mission and vision statement will be how we establish a basis for success as an organization. We cannot define a strategic direction for our organization until we have the mission and vision in place.



Pitch Perfect: Projects

What preparations have you made for the project? How do you plan to implement the project once it's complete?

We will provide the volunteer with our existing mission, vision, or value statement plus other relevant background materials. Our organization has clearly defined stakeholders and will provide that information to our volunteer partner. We have a designated member of our team available to work with the volunteer on this project.

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What Comes Next?

- Check your email
- Schedule screening calls
- Manage applicants
- Match with a skilled volunteer!

The screenshot displays the Taproot platform interface. On the left is a blue sidebar with navigation options: Projects, Sessions, Applicants, Inbox (with a red notification badge for 16), Nonprofit profile, Settings, Feedback, and Resources. The main content area shows a project titled "Event Calendar Development - Wordpress".

Project Details:

- Value Received:** \$10,500
- Projects Matched:** 7
- Duration:** 6 - 9 weeks
- Location:** Los Angeles, California
- Can be done remotely:** Yes
- Website:** <https://equalsound.org>
- Posted:** January 24th
- Member since:** 2019-02-14
- Status:** Published

Project Overview: Equal Sound strives to introduce listeners to new music by breaking down the traditional confines of musical genres. As advocates for "classical" music, Equal Sound is dedicated to the idea that all music is created equal. Equal Sound curates experiences that illuminate the threads.

Skills: Search Engine Optimization (SEO), Content Management, Web development, Squarespace, Wix.

Confirmed: You have a call on Tuesday, May 26th at 11:00am PDT.

Contact Information for Olivia Doe:

- Profile: OD
- LinkedIn: Olivia Doe
- Phone: (123) 456-7890
- Email: Oliviadoe@gmail.com
- Call Time: Tuesday, May 26th at 11:00am PDT

Actions for Confirmed Call: SEND A MESSAGE, WORK WITH OLIVIA ON A DIFFERENT PROJECT, JOIN VIA WEBEX, RESCHEDULE THIS CALL, DECLINE.

Applied: Margaret Hackert-Kroot, Web Designer.

Actions for Applied Volunteer: SCHEDULE A CALL, DECLINE THIS VOLUNTEER.

Applicants: 3 applicants have already responded to your project. (Includes profile icons for OD, DD, and DC). Action: VIEW ALL APPLICANTS.

Statistics of views: 3 views today. A bar chart shows views on 06/05 (6), 06/06 (2), 06/07 (6), and 06/08 (2).

Sources/Resources

- [Strategic Planning Doesn't Need to be Painful \(Podcast\)](#)
- [Successful Nonprofits Blog](#)
- [Strategic Planning For Nonprofit Organizations \(Book\)](#)
- [Board Assessment Tools](#)



taproot

Questions & Answers
help@taprootplus.org