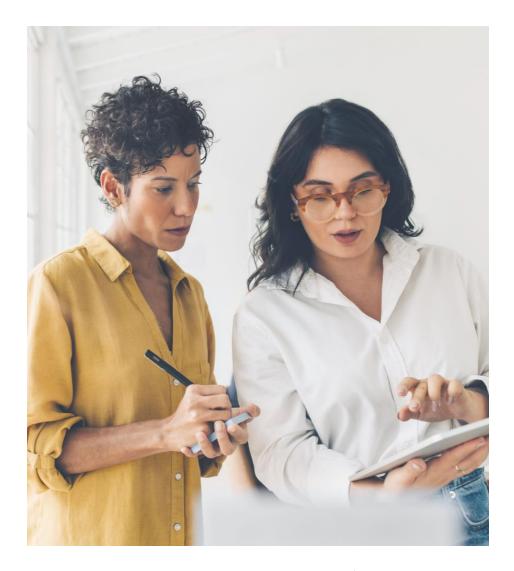


Volunteer Support for Nonprofit Strategic Planning

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 missiondriven organizations by mobilizing skilled volunteers to advance resource equity.





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







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?





Discovery:

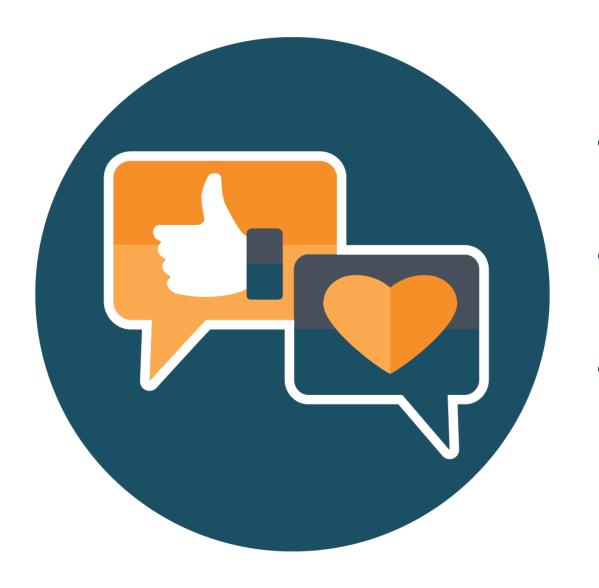


Information Gathering/Environmental Scan:

- 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:

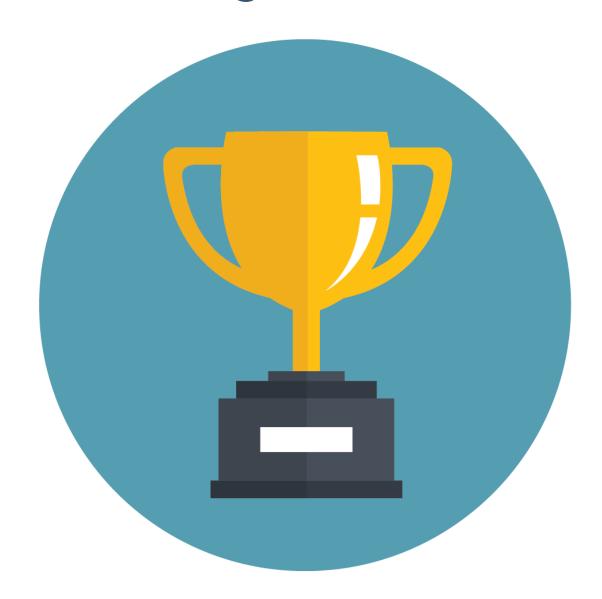


Working Group/Start Plan Committee:

- 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:

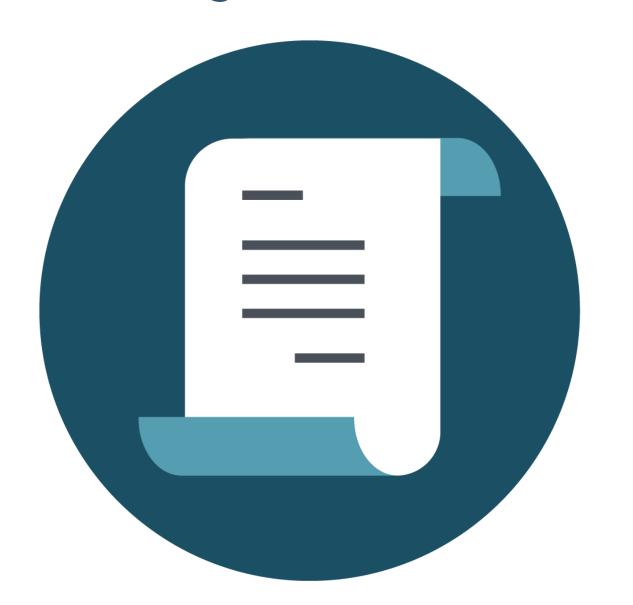


Board Retreat:

- 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:

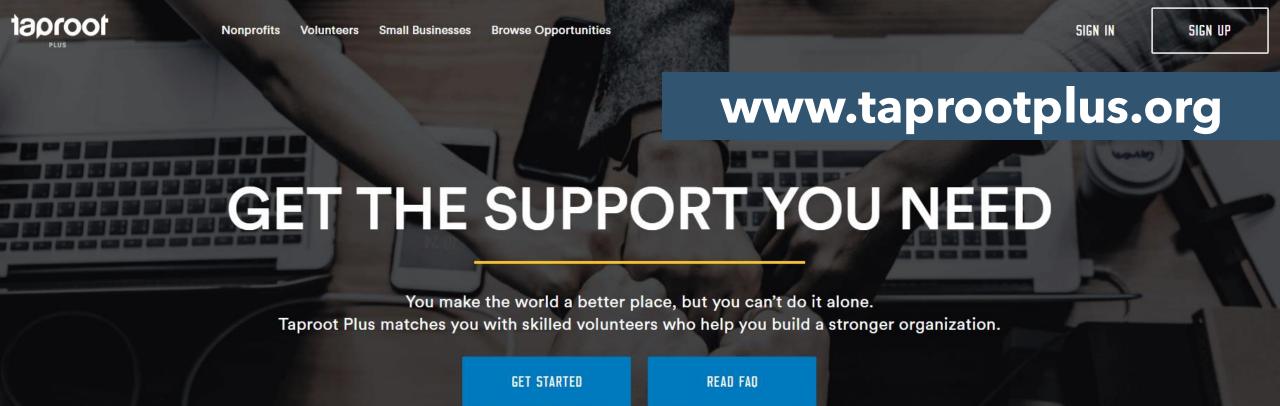


Implementing The Strategic Plan:

- Press Release
- Create Dashboard
- Put Plan on Website







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

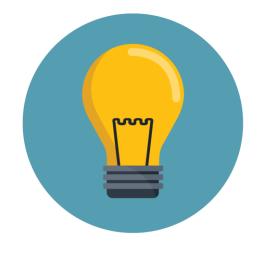


Strategic Planning With Skilled Volunteers



Facilitation

Working Group
Board Retreat



Info Gathering

SWOT Analysis

Data Analysis



Messaging

Copywriting
Graphic Design



Metrics

Dashboard KPIs



- 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?

at Kind Of Support Are You Looking For?
ect a category V
cribe the project you would like a skilled volunteer to complete.
ojects 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 ed.
ate a compelling pitch to attract volunteers to your project.
ny is this project a priority for you at this stage? How would this project help achieve your organization's goals or further your mission? ny is this project a good investment of the skilled volunteer's time?
at preparations have you made for the project? How do you plan to implement the project once it's complete?
monstrate that you have the materials, time and staff commitment to successfully complete this project with the skilled volunteer. ow them that your organization is ready to implement the work that they do.



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.



Create a compelling pitch to attract volunteers to your project.

Making sure our mission and vision statement is clear, conscice, 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.





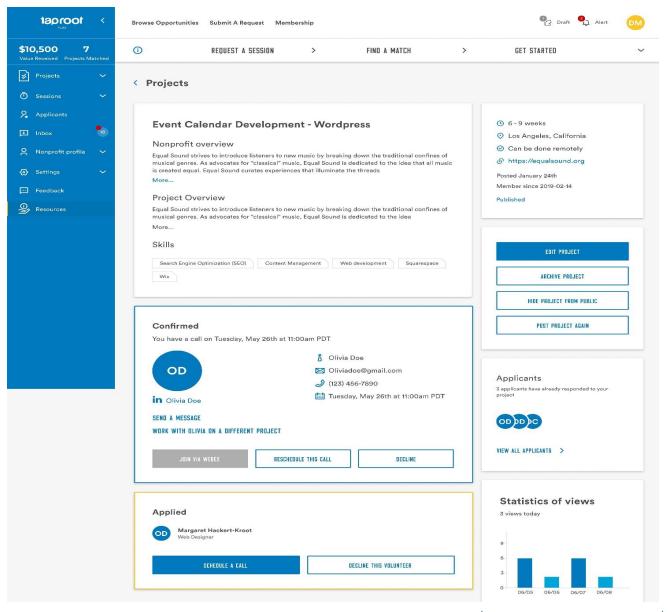
What preparations have you made for the project? How do you plan to implement the project once it's complete?

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.



What Comes Next?

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







Sources/Resources

 Strategic Planning Doesn't Need to be Painful (Podcast)

Successful Nonprofits Blog

 Strategic Planning For Nonprofit Organizations (Book)

Board Assessment Tools



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Questions & Answers help@taprootplus.org