

COMMON PROJECTS

Below is a summary of common Taproot Plus projects

Business Development

- ▶ Board reporting dashboard
- ▶ Business strategy coaching (30 hours of coaching)
- ▶ Cost-reduction analysis
- ▶ Financial modeling and reforecasting
- ▶ Grant tracking and reporting
- ▶ KPI development
- ▶ Market research
- ▶ Pitch development (business proposal/grant writing)
- ▶ Policy review and management
- ▶ Project management
- ▶ QuickBooks help
- ▶ SWOT analysis/Environmental scan

Marketing/Communications

- ▶ Brand strategy
- ▶ Communications plan
- ▶ Copy writing/editing
- ▶ Customer journey mapping
- ▶ Design (logo, brochure, annual report, one pagers, letterhead, websites)
- ▶ Digital marketing (social media strategy, Google AdWords)
- ▶ Key message development
- ▶ Media relations strategy
- ▶ Multimedia (photography, videography, presentation deck)
- ▶ Public relations plan

Information Technology

- ▶ Technology vendor assessment

Human Resources

- ▶ Board development (gap analysis, evaluation process, recruitment messaging)
- ▶ Board effectiveness
- ▶ Change management coaching + recommendations
- ▶ Employee handbook
- ▶ Performance management process

COMMON PROJECTS

Business Development

Board reporting dashboard

A Board Reporting Dashboard project translates a nonprofit's strategic and operating plans into a simple set of metrics that covers financial, administrative, programmatic, and governance performance. The board of directors can use the dashboard to quickly focus on the key drivers of the organization's success.

Business strategy coaching (30 hours coaching)

Coaching to increase management competencies and practices that facilitate the planning process can have a positive impact in making strategy development and implementation achievable with confidence, efficiency, and full use of organizational resources. Coaching can be applied during any phase of business strategy development. Preparing the team for strategy development provides opportunities for individual and team coaching designed to maximize outcomes, establish clear roles and relationships, and ensure that new and existing competencies contribute to measurable results.

Cost-reduction analysis

A cost-reduction analysis is a tool for determining which costs an organization can cut without impacting its ability to deliver on its mission. The analysis delves into administrative and operational expenses, workflows, and the supply chain for goods and services to show where excess resources are being used and can be reduced or eliminated.

Financial modeling & reforecasting

Leveraging Excel or other tools to help create cash flow models that will help an organization manage their spending and financials. This support can include review of financial projects and assumptions to help project budget planning moving forward.

Grant tracking & reporting

Establishing or improving a system for grant tracking and reporting can help streamline processes that are critical to sustainability of an organization. This can enable staff to more effectively and efficiently manage grants information.

KPI Development

Key Performance Indicators help an organization to monitor its operational health. This project identifies what success looks like in terms of operations and develops the right metrics to measure performance. Using data effectively to monitor performance is critical for organizations to continually improve their operational efficiency and fulfill their mission.

Market research

An organization can use a market research project to gather and analyze external information about an issue area, program design, and/or operating environment. The organization can then use the synthesized information to make an improved decision on how to make progress on its goals.

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Business Development

Pitch development (business proposal/grant writing)

A business pitch is not only a crucial tool for your organization, it is also one of the best tools you can use to flesh out your business concept, iterate it through different variations, and find a business model that works and will turn into funding.

Policy review & management

External review of existing and/or new policies can help ensure an organization's most relevant and important information is clearly documented. This support can also focus on creation of a policy management system to maintain a consistent and streamlined database.

Project management

Many projects involve large-scale planning that affects every department or aspect of a business. Implementing the project may mean dealing with human resources, budgetary, and supply constraints. Accredited project managers are skilled in project management techniques specific to dealing with one-time projects. Organizations that use project management to monitor and control processes and schedules can more effectively complete their projects on time and on budget.

QuickBooks help

No matter what the nature of your business, keeping an accurate set of books is essential. Without accurate business records, it will be difficult to attract the funding you need because business records are generally the first thing potential lenders and investors want to see. Using QuickBooks to keep your business records lets you avoid those potential problems.

SWOT analysis/ Environmental scan

This project lays out an organization's strengths and weaknesses (factors related to the organization), as well as opportunities and threats (factors related to the organization's environment). It helps an organization to understand what makes it unique and develop a strategy to protect itself against threats and identify opportunities to pursue.

Project Tip

Deloitte Volunteers will bring a variety of skillsets to the Taproot Plus Community. Organizations may want to consider how a broader, timely organizational focus may break down to distinct project needs. If preparing for a virtual gala, for example, the following areas may lend themselves to discrete projects:

- Creating a communications outreach plan
- Analyzing donor outreach data
- Establishing a project management approach

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Marketing/Communications

Brand strategy

Your brand is your promise to your customer. It tells them what they can expect from your services, and it differentiates your offering from your competitors'. Your brand strategy is how, what, where, when, and to whom you plan on communicating and delivering on your brand messages. Where you advertise is part of your brand strategy. Your distribution channels are also part of your brand strategy. And what you communicate visually and verbally are part of your brand strategy, too.

Communications plan

A communications plan is a written document that describes what you want to accomplish with your association communications (your objectives), ways in which those objectives can be accomplished (your goals or program of work), to whom your association communications will be addressed (your audiences), how you will accomplish your objectives (the tools and timetable), and how you will measure the results of your communications efforts (evaluation).

Copy writing/editing

Beyond making a strong impact, an organization needs compelling messaging to articulate its work and successes to potential and existing supporters, its board, and other stakeholders. This project edits an organization's existing written content and crafts new messaging that connect emotionally with its target audience.

Customer journey mapping

Mapping out steps a specific customer persona (e.g. donor, beneficiary, etc.) goes through can help your organization assess the big picture for engagement with key stakeholders and inform future opportunity areas and decision-making.

Design

This project includes graphic design for key marketing collateral. Common design projects are for logos, brochures, annual reports, one pagers, specific website graphics.

Digital marketing (social media)

A social media plan gives an organization a roadmap for engaging its stakeholders with social media tools. The plan will connect the communications strategy and messaging identified in the organization's communications plan with the best social media applications for reaching external audiences.

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Marketing/Communications

Digital marketing (Google AdWords)

A Google AdWords plan helps a nonprofit strategize on maximizing the benefits of an advertising grant from Google. This project will review the nonprofit's targeted audience and marketing tactics to write copy that has the right keywords and follows Google's guidelines.

Key message development

Simply put, messaging is a term to describe how you talk about who you are and why you exist as an organization. It communicates key points you consistently make when you reach out to your audience and it always ties back to your brand. Different messages can be developed for different purposes, such as speeches, fundraising campaigns or presentations. A well-crafted message will highlight your unique benefits, target your audience, support your mission and often include a call to action.

Media relations strategy

Media relations involves working with media for the purpose of informing the public of an organization's mission, policies and practices in a positive, consistent and credible manner. This means coordinating directly with the people responsible for producing the news and features in the mass media. Public relations and media relations are not the same. Media relations refers to the relationship that an organization develops with journalists, while public relations extends that relationship beyond the media to the general public.

Multimedia (photography, videography, presentation deck)

A multimedia project helps an organization to reach and engage with clients, supporters, and prospective stakeholders through multimedia, such as photos, a podcast, video, slideshow, and/or webinar. The multimedia item can be integrated into an organization's website, events, social media outreach, advocacy, and fundraising campaigns.

Public relations plan

A public relations plan identifies an organization's communications goals and target audiences, then develops strategies to achieve its objectives. The plan can include recommendations for a broad spectrum of tools to execute the strategies, including a PR calendar, media lists, coaching on media relations, media training, news releases, speeches, and press kits.

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Information Technology

Technology vendor assessment

Having the right technology at hand can help streamline and automate processes across business functions, and identifying where technology can make the greatest impact is the first step in shaping a more efficient organization. A vendor assessment will help you evaluate your options and chose a vendor/platform that makes the most sense of your organizational structure, priorities, and budget.

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Human Resources

Board development (separate projects include: gap analysis, market analysis, recruitment/marketing tools)

A board can and should do more than fundraise, but building an engaged and effective board of directors is one of the most difficult tasks a nonprofit can face. A board recruitment project helps a nonprofit outline the right board team for its specific needs and develops the marketing tools needed to build a solid board pipeline that consistently brings in the right candidates.

Board effectiveness

Board Effectiveness measures a nonprofit's board capacity and performance. It typically looks at the board's governance practices, stewardship, membership, resource generation, and CEO management to help guide a board on how it can best help the nonprofit it serves.

Change management coaching and recommendations

Change, whether driven by internal or external conditions, can be challenging for any organization. This project develops strategies and processes to support the successful implementation of the change using skills training, leadership coaching, and culture adjustment.

Employee handbook

If you have more than a few employees, it's a good idea to create an employee handbook that clearly explains your workplace policies. The benefits of having an employee handbook are many: Every employee receives the same information about the rules of the workplace; your employees will know what you expect from them (and what they can expect from you); and you'll buy yourself valuable legal protection if an employee later challenges you in court.

Performance management process

A strong performance management system increases staff satisfaction and effectiveness while improving an organization's ability to fulfill its mission. The right system helps leadership and staff clarify personal objectives, align them with organizational objectives, and receive regular feedback to learn from past performance and continuously improve.

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MATTER**

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PLUS

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