

Want to Build an In-House Pro Bono Program? Ask These 5 Key Questions Before You Begin

with

Lindsay Firestone

and

Diana Fischer

Taproot Foundation



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Open Q&A with the Audience

Type your questions into the question box on the right panel.

We will pose them to the speaker for everyone to hear.



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BUILD

A Blueprint for
Pro Bono Program Development

Taproot Blueprint Series

WHAT WILL YOU LEARN

- ▶ The **5 key questions** you need to ask before starting a pro bono program
- ▶ What you should do to get started
- ▶ Who should be at the table
- ▶ Free resources that will help you along the way

GETTING STARTED

EVERYBODY
WANTS A
CHECKLIST

TAPROOT PROGRAM DESIGN

CHECKLIST

DISCOVER

- Decide what your company wants to achieve with a pro bono program
- Determine the impact you would like to make—e.g. community and business benefits
- Decide on an appropriate scale and size for your program
- Choose from the many models of pro bono service to find a good fit for you

DESIGN

- Determine how many nonprofits and employees to involve in the immediate future (you can set separate goals for growing the program later on)
- Assess common areas of nonprofit need and available employee skills—and then look for alignment
- Determine high-potential project types and create a short-list of viable projects
- Determine an outreach strategy to target and recruit employee participants and nonprofits
- Select a group of pilot projects and nonprofit partners and begin recruiting volunteers
- Look for existing project management tools and best practices
- Create additional tools (if needed) to ensure smooth and consistent program operation
- Design an evaluation model to capture feedback and track impact and results
- Prepare standard evaluation tools to capture employee feedback and measure satisfaction
- Prepare evaluation tools to gather feedback and measure nonprofit satisfaction
- Establish a system to track employee hours and determine project values

THE FIVE KEY QUESTIONS OF PROGRAM DEVELOPMENT

STRATEGY

WHAT DO I WANT MY PROGRAM TO ACCOMPLISH?

SELECTION

WHAT PROJECTS MAKE SENSE FOR MY COMPANY?

LAUNCH PLAN

HOW AM I GOING TO START A PROGRAM?

SUPPORT

HOW CAN I SET MY PROJECTS UP FOR SUCCESS?

ASSESSMENT

HOW WILL I EVALUATE AND MEASURE MY PROGRAM?

WHO SHOULD BE AT THE TABLE?

FUNCTIONAL EXPERTS

COMMUNITY RELATIONS

HUMAN RESOURCES

EXECUTIVE SPONSORS



WHAT DO I WANT MY PROGRAM TO ACCOMPLISH?

STRATEGY



SELECTION



LAUNCH PLAN



SUPPORT



ASSESSMENT

COMMUNITY GOALS

- ▶ Deepen engagement with an existing partner
- ▶ Target a signature issue area
- ▶ Build relationships and gain visibility in the community

BUSINESS GOALS

- ▶ Expand your community impact without adding significant costs
- ▶ Improve your reputation and visibility within the corporate philanthropy field
- ▶ Offer leadership development and cross-functional team-building opportunities for employees



Taproot's **Business Value Flashcards** can provide even more info on key business benefits

WHAT DO I WANT MY PROGRAM TO ACCOMPLISH?

STRATEGY



SELECTION



LAUNCH PLAN



SUPPORT



ASSESSMENT

CHOOSE A MODEL
THAT'S RIGHT
FOR YOU



LOANED
EMPLOYEE



FUNCTIONAL
COACHING AND
MENTORING



MARATHON



STANDARDIZED
TEAM
PROJECTS



OPEN-ENDED
OUTSOURCING



SECTOR-WIDE
SOLUTIONS



GENERAL
CONTRACTING



SIGNATURE
ISSUE



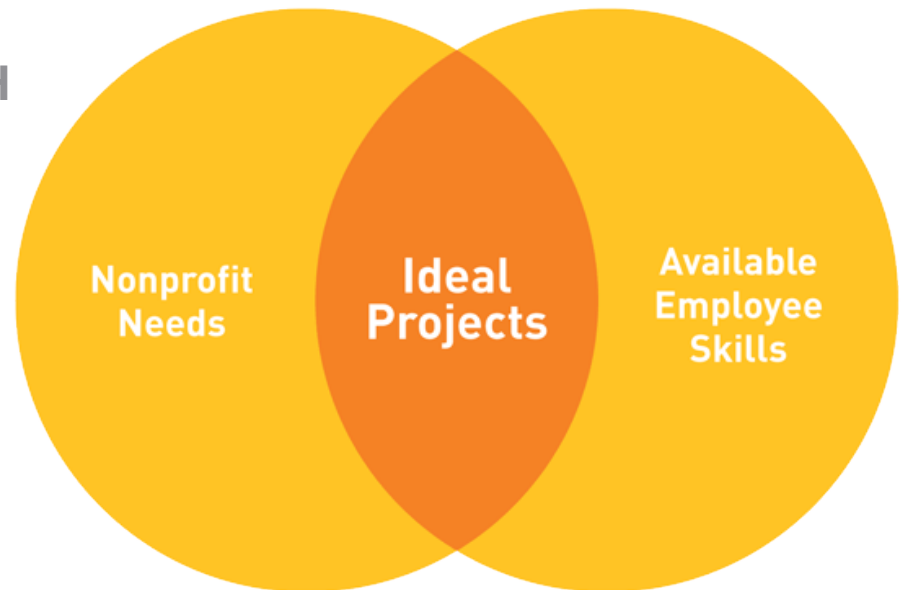
The **8 Models of Pro Bono Service** whitepaper is available in the resources section of Taproot's website

taproot
FOUNDATION

WHAT PROJECTS MAKE SENSE FOR MY COMPANY?



THE BEST PROJECTS MATCH EXISTING NONPROFIT NEEDS WITH AVAILABLE EMPLOYEE SKILLS



Taproot's **Competencies Map** can take the guesswork out of matching employee skills with nonprofit needs

HOW AM I GOING TO START A PROGRAM?

STRATEGY



SELECTION



LAUNCH PLAN



SUPPORT



ASSESSMENT

START SMALL TO TEST THE MODEL



Decide how many volunteers or nonprofits to involve (we recommend no more than 3-5 projects to start)



Finalize your list of pilot projects from your short-list of nonprofit partners and available employee skills



Recruit and staff pilot projects with interested employees



Develop tools and trainings, including an orientation curriculum, to support participants

HOW CAN I SET MY PROJECTS UP FOR SUCCESS?



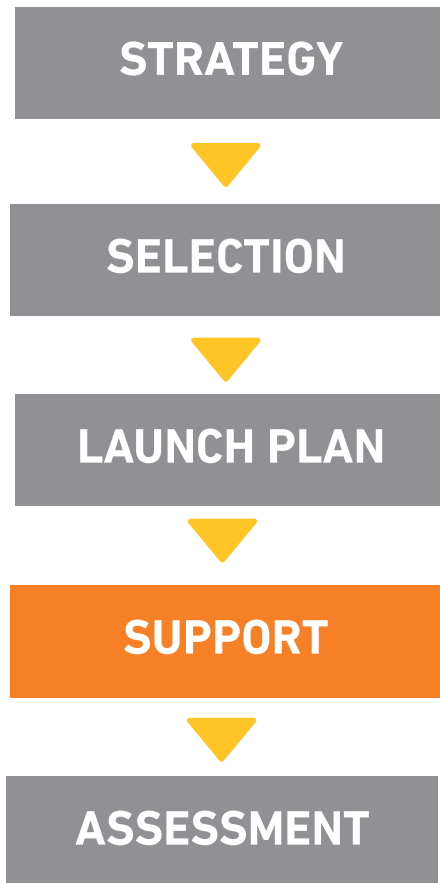
THE FIVE KEY TENETS OF SUCCESSFUL PRO BONO PROJECTS

- ▶ The project is completed and delivered in a timely manner
- ▶ The deliverable is implementable and sustainable
- ▶ The Clients' and the Volunteers' expectations are met or exceeded
- ▶ All parties report high satisfaction with the group's interactions
- ▶ The Client reports that the project **made an impact**



Our **Designing for Impact Framework** is available in the resources section of Taproot's website

HOW CAN I SET MY PROJECTS UP FOR SUCCESS?



ANTICIPATE COMMON CHALLENGES...

- ▶ Team Turnover
- ▶ Timeline Creep
- ▶ Scope Creep

.... AND PLAN TO AVOID THEM WITH TOOLS

SERVICE AGREEMENT

Defines the terms and expectations surrounding the working relationship between the team and nonprofit

SCOPE TEMPLATE

Clearly establishes what will and will not be accomplished during project work and defines roles and responsibilities

PROCESS OVERVIEW

Maps out key steps and milestones with associated dates

HOW WILL I EVALUATE AND MEASURE MY PROGRAM?

STRATEGY



SELECTION



LAUNCH PLAN



SUPPORT



ASSESSMENT

EVALUATION DOESN'T HAVE TO BE SCARY



Start with basic satisfaction measures to make sure the project met expectations



Ask volunteers to track hours and calculate dollar valuation



Then consider more sophisticated evaluation on ROI and impact

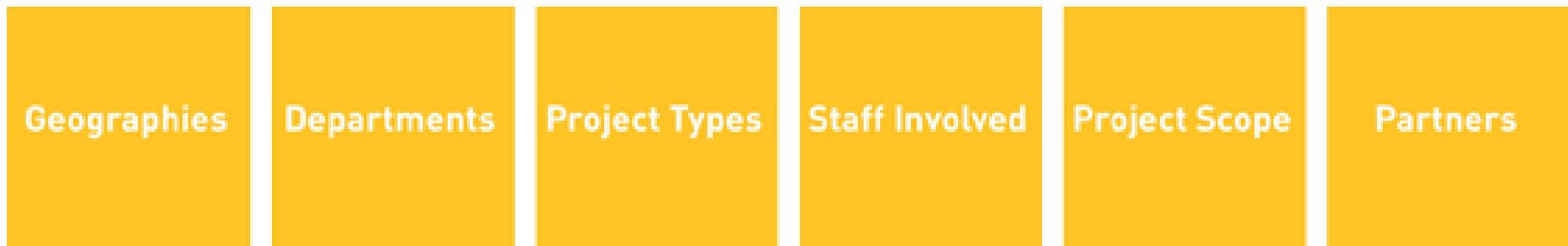


The **Hour Tracking and Dollar Valuation** workbook will help you track and value your pro bono efforts

GROWING YOUR PROGRAM

WHEN IT COMES TIME TO SCALE, THINK ABOUT ALL OF YOUR OPTIONS...

STRATEGIC GROWTH OPTIONS



▼

Explore a new model of pro bono service – if you've done a marathon, think about individual service

▼

Expand the scope of the project - If you've completed a website update, move on to a donor database or IT needs assessment

▼

Invite new nonprofits to apply or join the program

KEY STEPS OF PROGRAM DEVELOPMENT

STRATEGY

WHAT DO I WANT MY PROGRAM TO ACCOMPLISH?

SELECTION

WHAT PROJECTS MAKE SENSE FOR MY COMPANY?

LAUNCH PLAN

HOW AM I GOING TO START A PROGRAM?

SUPPORT

HOW CAN I SET MY PROJECTS UP FOR SUCCESS?

ASSESSMENT

HOW WILL I EVALUATE AND MEASURE MY PROGRAM?

A PILOT PRO BONO PROGRAM COMES TO LIFE

START

Chevron wanted to launch a pro bono program.

STRATEGY

Chevron decided what they wanted the program to accomplish.

ASSESSMENT

Chevron scheduled periodic check-ins with the participants and collected feedback at the end of the projects.

They picked a model of service that suited their company culture and program goals.

SELECTION

They asked their nonprofit partners what they need – through a survey and individual interviews.

RESULTS

The projects for three nonprofit partners wrapped up successfully, delivering approximately \$120,000 in professional services.

SUPPORT

They used functional experts to help build out standard project tools that set the pilots up to be successful.

They investigated what employees and departments have the right skill set and were motivated to participate.

LAUNCH PLAN

They decided to begin with a group of three pilot projects.

They selected the pilot projects based on how closely their nonprofit needs aligned with available employee skills.

TOOLS AND RESOURCES

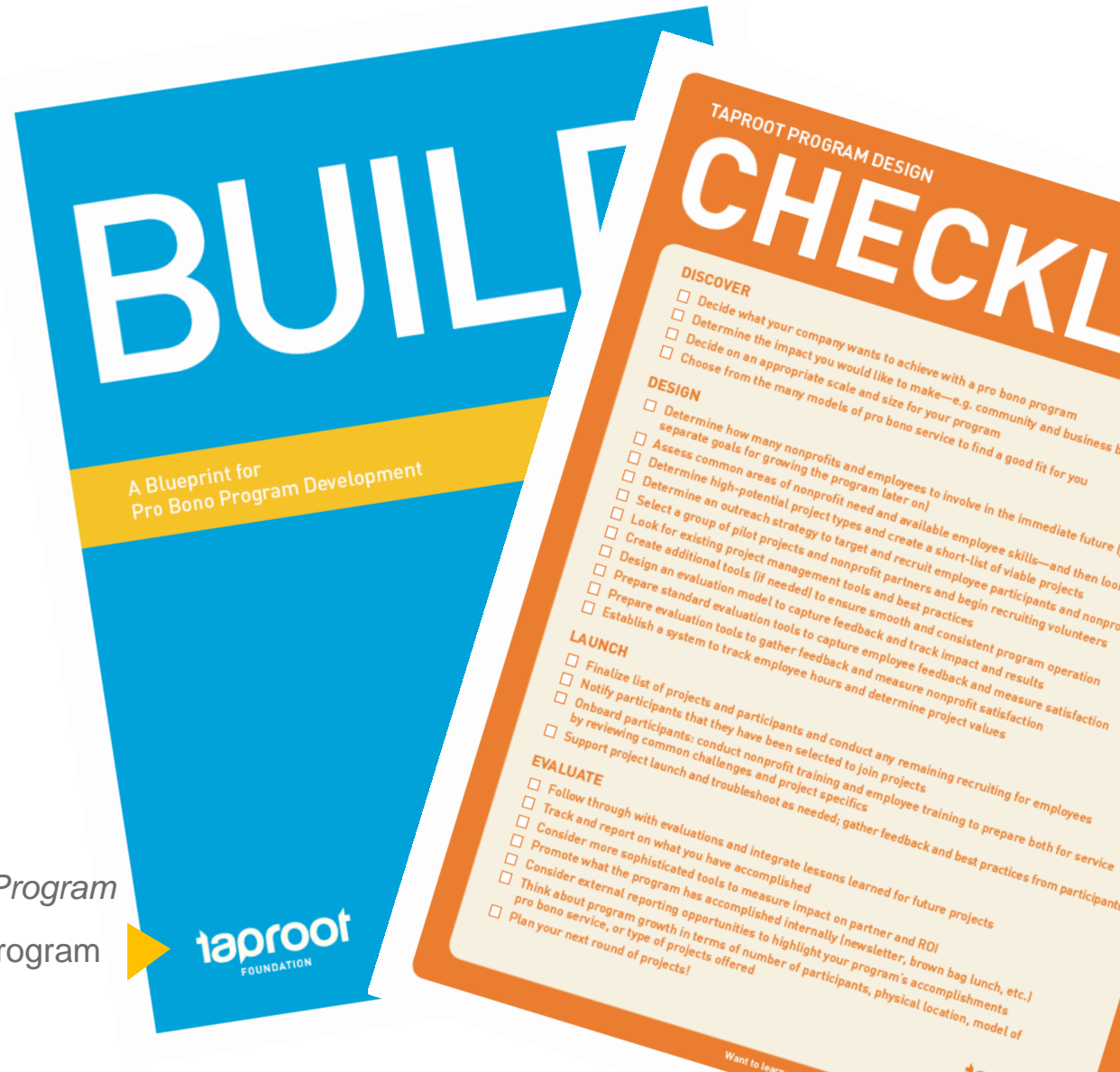


VISIT THE
RESOURCES
SECTION OF THE
TAPROOT
WEBSITE TO VIEW
AND DOWNLOAD
THESE TOOLS
AND MORE

www.taprootfoundation.org

Lead Pro Bono > Resources > Build A Program

www.taprootfoundation.org/s/buildaprogram



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The VolunteerMatch blog for business leaders

VOLUNTEERMATCH SOLUTIONS ABOUT THIS BLOG HOME

“Creating Change” with Pro Bono: A Q & A with Discovery Communications

by Robert Rosenthal on October 15, 2010



Most people are familiar with [Discovery Communications](#) for the award-winning work of its entertainment and news brands, including Animal Planet, Discovery Channel, TLC, and Treehugger. The Silver Spring, Maryland, company also has a strong [commitment](#) to social responsibility.

Inspired by its first ever global service event last June, “Discover Your Impact Day,” this December the company will launch an innovative program to deliver pro bono expertise to nonprofits, called “Discovery Impact: Creating Change” [...]

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Solutions

FREE WEBINAR !!!

PRO BONO VOLUNTEERING
8 Proven Models for Community and Business Impact

10/21 | 10AM PT / 1PM ET

Register

VolunteerMatch Solutions

Track Hours
Manage Events
Engage Community
Service Causes

The VolunteerMatch **SEARCHLITE WIDGET**

DOWNLOAD

WELCOME

Volunteering Is CSR is our argument to business leaders that volunteer engagement can and should be a prominent part of the CSR mix. VolunteerMatch can help. [Learn more.](#)

Read Our Blog

www.VolunteeringIsCSR.org

Receive our Newsletter

solutions@volunteermatch.org

Next Webinar:



Giving in Numbers: Emerging Trends in Corporate Philanthropy

Wednesday, July 13th

10am PT/1pm ET

**Alison Rose, Manager of Standards and Measurement
Committee Encouraging Corporate Philanthropy (CECP)**