TRACKING AND VALUING PRO BONO EFFORTS

The idea of tracking hours and reporting the value of your company's pro bono program may bring to mind images of stacks of paper and never-ending e-mail chains. But it doesn't have to be stressful or complicated! Getting a handle on how many hours your employees have given and how much that time is worth is easy and straightforward. This packet has everything you need – tools, directions, and templates – to make those e-mail chains a thing of the past!

As the coordinator of multiple projects, you should make sure each team has the proper instructions and the forms they need to get started. By setting them up for success, you can simplify your job in the long-run. At the end of each project, you'll receive one piece of paper with all of the project details – including the dollar value of the work – that will make externally reporting the work of your community program simple and painless.

THIS PACKET INCLUDES:

For more information visit:
www.taprootfoundation.org

01 BACKGROUND INFORMATION

SOME NOTES BEFORE YOU GET STARTED

This packet provides a basic hour reporting and value tracking system. It will help you:

- Track the number of hours contributed by employee and by project
- Determine the approximate market value of each project

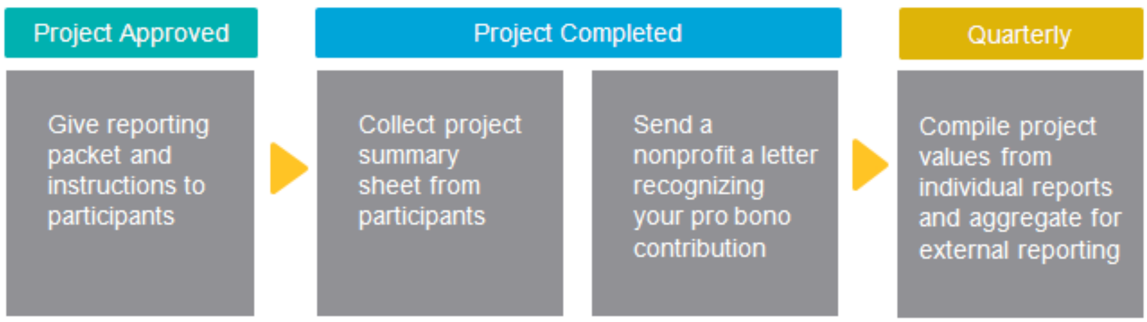
All of the forms, instructions, and documents you'll need to report your pro bono work are included on the following pages. This system is suitable for programs big and small, and can work well for those programs with little or no technological capabilities. Yes, it will require some photocopying on your part, but in the end you won't be tracking down individual employees or worrying about how you'll report on range of projects you oversee.

That being said, if your company has an hour tracking system in place already – use it! The most successful tracking models are those that leverage existing technology. If you track hours for paying clients, create an account for each pro bono client – the volunteers staffing the projects will already be accustomed to tracking their billable hours. If the company already has established billing rates – use those too! The employee team members are using the same professional skills on these projects as they do for the paying clients, so it makes sense to use their current billing rates whenever possible. A special worksheet is included in the Appendix should you already have an hour tracking system in place.

02 PROCESS OUTLINE

Because you likely coordinate multiple projects, we've kept your duties as simple as possible. The bulk of project tracking and calculation will be done by team members.

PROCESS SNAPSHOT



Your main responsibility is to collect and compile information from individual projects to report out on your program achievements. Additionally, you must provide the necessary tools to each team to enable them to track hours and determine the value of their project. Finally, depending on how responsive the team is, you may need to encourage the team to submit the project summary sheet at the conclusion of project work. Avoid this up front by telling the team what you need and when you'd like it by.

03 ROLES AND RESPONSIBILITIES

REPORTING CAPTAIN: DUTIES AT-A-GLANCE

- ▶ Send hour tracking reminders to fellow team members
- ▶ Tally the hours worked by individual volunteers at the project close
- ▶ Determine the fair market value of the pro bono work

The tracking and valuation process centers on selecting a Reporting Captain – an individual in charge of helping the team track and report their work – when each project team is assembled.

With the bulk of information gathering and calculations being done by the Reporting Captain, very little day-to-day work is required of you. To understand how the actual hour tracking process works, it is best to simply read the packet you'll be giving to the teams (it is included in the Appendix).
When the Reporting Captain has determined the value of the project and reported back to you at the conclusion of the project, he or she will also provide you with an acknowledgement letter to return to the nonprofit partner. The letter – which states the project type and fair market value of the services provided – should be signed and given to the nonprofit. Doing this will help the nonprofit recognize the value of the team's contribution as well as ensure that both you and the nonprofit agree on the stated fair market value of the project. It can also serve as a thank you and official recognition of the close of a project. You should also expect a letter form the nonprofit confirming the project value and providing short stories or narration about the project results for reporting purposes. Templates for these letters are included in the Reporting Captain's packet.

As multiple teams provide you with project reports, you should be tallying the individual project values to get a picture of your company's overall giving. By keeping completed sheets together or by creating an Excel project summary chart, generating giving reports will be easy and worry-free.

CHECKLIST: YOUR RESPONSIBILITIES

- ☐ Distribute the Reporting Captain Duties packet to teams (included in Appendix)
- ☐ Collect summary forms from each team at end of project
- ☐ Sign off on project award letter and send to nonprofit partner
- ☐ Collect and combine individual reports to communicate company-wide giving totals

04 INCENTIVE IDEAS

So, how can you be sure that employee teams will report back to you at the project close? Think about what incentives will encourage reporting. Talk to teams about the benefits of reporting when you share the packet. Here are some ideas and topics to get you started.

FINANCIAL REWARDS

If your company has a dollars-for-doers program or similar grant offerings for partner organizations, think about tying reporting hours to additional funding opportunities.

RECOGNITION OPPORTUNITIES

Organize company- or department-wide volunteer receptions. This is a great way for volunteers to connect with other employees working in different departments and on a variety of projects.

SHARE VOLUNTEER STORIES

Encourage employees to share their experience with co-workers who weren't involved with the project. Telling peers about accomplishments (including project value!) and discussing the impact it had on the nonprofit is very rewarding for volunteers. You can enhance this benefit by publishing stories internally on your company's intranet or in a newsletter.

PROFESSIONAL DEVELOPMENT BENEFITS

Tie reporting of projects to recognition of professional development benefits. Emphasize that with formal reporting, the volunteer can ensure their project is recorded and the value is recognized by Community Affairs. Offer information about the skill-building benefits of pro bono service. Employees should include and discuss their experience during their annual performance review or other evaluation.

APPENDIX

01 **REPORTING CAPTAIN DUTIES PACKET**
02
03 This packet should be given to each pro bono team when a project is approved. It will guide tracking of employee hours as well determine project value. (p.8-17)
04
05 **PROJECT SUMMARY SHEET**
06
07 If you already have an hour tracking system in place, this calculation worksheet will walk you through turning the total number of hours contributed by team members into a fair market value of each project. It should be used in place of the Reporting Captain Duties Packet. (p.19)
08

01 REPORTING CAPTAIN DUTIES PACKET

NOTE:

A Word document version of the Hour Tracking Worksheet (p.12), Individual Hour Contribution Worksheet (p.13) and the Project Summary Sheet (p.15) are available in separate one-page Word document formats. That way, they can easily be attached and e-mailed during the reporting process.

REPORTING CAPTAIN DUTIES

So you've been chosen as the reporting captain. Congratulations! Feeling a little nervous that you won't be up to the task? Well, good news – your work is easier than you think. The most important part of reporting is simply making sure someone is in charge! And that's where you come in. This packet will allow you to help your company *and* your partner nonprofit. By putting a dollar value to the hard work that you are doing (along with the rest of your team), you can be sure that the value of your pro bono service will be accounted for.

In this packet, you'll find all of the necessary tools to help your team track hours, to help you turn those hours into a project value, and forms to tell your community affairs contact and nonprofit partner the dollar value of your hard work. Each form is color coded, and complete instructions are included with each page.

NOW IT'S TIME TO PUT YOUR PRO BONO POWERS TO WORK.

REPORTING CAPTAIN DUTIES

TO-DO LIST

We'll go into more detail for each step over the next few pages.

STEP 1.	Train team on reporting expectations and tools at the start of the project
STEP 2.	Send reminders to team to track hours during project work
STEP 3.	Collect Individual Hour Contribution Worksheets at end of project
STEP 4.	Complete Project Value Calculation Sheet
STEP 5.	Fill out the Project Report Sheet, Pro Bono Service Project Recognition Letter and Pro Bono Service Project Invoice and send to Community Affairs (or whatever your philanthropic division is called) and nonprofit partner

TIMELINE AND KEY DOCUMENTS

START OF PROJECT	**STEP 1.**	Team Training
DURING PROJECT	**STEP 2.**	Hours Tracking Worksheet
END OF PROJECT	**STEP 3.**	Individual Hour Contribution Worksheet

	STEP 4.	Project Value Calculation Sheet

	STEP 5.	Project Report Sheet Pro Bono Project Recognition Letter Pro Bono Project Invoice

REPORTING CAPTAIN DUTIES

STEP 1.	Train team on reporting expectations and tools

It is important for your team to understand how reporting helps both your company and your nonprofit partner and to set expectations so everyone on the team is prepared to report their hours at the end of the project. This training should happen before project work begins.

At the first team meeting, you should talk about the top reasons why hour tracking and reporting the dollar value is important:

- Adds to the overall business value for the company
- Improves the company's standing in the corporate social responsibility world
- Communicates the scale of the company's social efforts to external audiences
- Helps the nonprofit report and value our pro bono contribution
- May allow the nonprofit to qualify for additional grant money

In addition, you should tell the volunteer team that the only thing that will be shared with Community Affairs is the total hours each individual contributed as well as the total dollar value of the project. Actual days and times an individual works will never be shared and only contribute to determining the value of the project.

REPORTING CAPTAIN DUTIES

STEP 2.	Send reminders to team to track hours during project work

As reporting captain, you need to remind your team that they should be keeping track of their hours. Choose the option below that works best for you and for your team.

GOOD

Send out an e-mail at the finish of the project and ask all group members to reply with an estimate of the total number of hours they worked on the project.

BETTER

At the start of the project, pick a few key milestones in advance (first draft, mid-project meeting, final wrap up, etc.) and send out calendar reminders for each team member to track the hours they worked during that interval. At the final meeting, ask team members to send you their hour totals on the Individual Contribution Worksheet.

BEST

Provide weekly tracking templates (an example is included on the following page) at the project start and set up recurring calendar reminders or e-mails asking the group to track their individual hours on a weekly basis. This provides the most accurate hour projections and ultimately, the most realistic dollar value for your pro bono contribution.

REPORTING CAPTAIN DUTIES

HOUR TRACKING WORKSHEET | For Employee Volunteers

Use this form to keep track of how many hours you are working on your pro bono project. At the end of each week, enter the hours you worked in the table below. This form is for your personal use only—*the days and times recorded will never be shared*.

Employee Volunteer Name	
Project Name	

Week	Date	Hours	Milestone/Notes
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
TOTAL HOURS WORKED			

REPORTING CAPTAIN DUTIES

STEP 3.	Collect INDIVIDUAL HOUR CONTRIBUTION WORKSHEETS at end of project

Distribute the form below and ask team members to return it within a few days. You can send it by e-mail (for your convenience, a Word-document version of this sheet is available as a separate attachment). You can also bring it to the final meeting or celebration and ask team members to fill it out in person and return it to you at that time. Remind them that the individual information isn't shared – just the project total that combines the contributions of each team member. Give each team member his or her own copy.

INDIVIDUAL HOUR CONTRIBUTION WORKSHEET | For Employee Volunteers

STEP 1: ENTER THE PROJECT DETAILS

Nonprofit Name
Project Name
Team Member Name

STEP 2: INDICATE YOUR HOURLY RATE OR EXPERIENCE LEVEL AND WORK TYPE

If you know your normal hourly rate:
1. Please write here the fee you charge per hour: $ /hr

If you do not know your normal hourly billing rate, or if you do not have one:
2. Check off your experience level below (if you don't know, use 'mid level')
3. Check off the primary type of work you performed for the pro bono project below (if you don't know, use 'other')

EXPERIENCE LEVEL		PRIMARY TYPE OF WORK PERFORMED FOR PROJECT					
		☐	☐	☐	☐	☐	☐
☐	Entry Level	Marketing, Advertising, PR	Accounting, Financial Services	Architecture, Engineering, Construction	Strategic Consulting, HR, IT, Organizational Design	Legal, Medical	Other
☐	Mid Level						
☐	Executive						

STEP 3: INDICATE YOUR TOTAL NUMBER OF HOURS WORKED DURING THE PROJECT

Enter in the gold box below the total number of hours you contributed to the and submit this document to your reporting captain	
Name	
TOTAL HOURS OF INDIVIDUAL PRO BONO SERVICE CONTRIBUTION	

REPORTING CAPTAIN DUTIES

STEP 4.	Complete PROJECT VALUE CALCULATION SHEET

PROJECT VALUE CALCULATION SHEET | For Reporting Captain

The directions below will explain how to complete Columns A, B, and C of this table.

Nonprofit Name			
Project Name			
EMPLOYEE VOLUNTEER NAME	**Column A:** Hours Worked	**Column B:** Pro Bono Billing Rate	**Column C:** Total Contribution
Reporting Capitan		x	=
Name		x	=
Name		x	=
Name		x	=
Name		x	=
Name		x	=
Total Pro Bono Project Value			

INSTRUCTIONS: HOW TO DETERMINE THE VALUE OF YOUR PRO BONO PROJECT

1. Using the individual hour contribution worksheets, enter the number of hours of pro bono service each employee volunteer contributed in Column A: Hours Worked
2. *For anyone who didn't report their hours*: use the average of the other volunteer's reported hours
3. *For volunteers who reported a specific hourly rate*: enter his or her hourly fee from the individual contribution worksheet in Column B of the table above
[*Note: Taproot Foundation always suggests using fair market value for pro bono services if available when calculating the project value of in order to determine the most accurate valuation possible.]*
4. *For those volunteers who did not report a specific billing rate***:** match their experience level and type of work performed from the individual contribution worksheet to the table below to locate the corresponding pro bono service billing rate and enter the value in Column B above

SKILL LEVEL	Marketing, Advertising, PR	Accounting, Financial Services	Architecture, Engineering, Construction	Strategic Consulting, HR, IT, Organizational Design	Legal, Medical	Other
Entry Level	$ 80	$ 90	$ 75	$ 100	$ 200	$ 85
Mid Level	$ 100	$ 135	$ 100	$ 150	$ 250	$ 120
Executive	$ 150	$ 200	$ 145	$ 225	$ 320	$ 180

5. *For any team member who didn't report*: just enter $120/hr in Column B – the average of all rates
6. Multiply Column A by Column B for each row and enter the result in Column C: Total Contribution
7. Add up all of the entries in Column A to find the total hours worked and enter in the blue box
8. Add up all of the entries in Column C to find the total project value and enter in the gold box
9. Use this form to complete Step 5, the Project Report Sheet

REPORTING CAPTAIN DUTIES

Step 5.	A) Using the data from Step 4, fill out the PROJECT REPORT SHEET. B) Complete the PRO BONO SERVICE PROJECT RECOGNITION LETTER C) Add contact information to the PRO BONO SERVICE PROJECT INVOICE

PROJECT REPORT SHEET | For Reporting Captain

STEP 1: TELL US ABOUT THE NONPROFIT PARTNER

Primary Nonprofit Issue Area (check one)			
□ Religion □ Health	□ Arts, Culture, & Humanities □ International/Foreign Affairs	□ Education □ Human Services	□ Environment/Animals □ Public and Social Benefit

Name		
Address		EIN
City	State	Zip

STEP 2: TELL US ABOUT THE PRO BONO SERVICE PROJECT

Project Name	
Brief Description of Project Accomplishments (1-2 sentences)	
Project Value ($)	Total Hours
Approximate Date of Project Completion (mm/yyyy)	
Pro Bono Service Project Category (check one)	

□ Medical Services □ Board Services □ Strategic Services	□ Financial Services □ Marketing/Branding □ Real Estate/Facilities	□ Technology Infrastructure □ Interactive/Website Technology □ Program Development	□ Fundraising □ Legal □ Other Services

STEP 3: REPORTING CAPTAIN INFORMATION

Signature	
Print Name	
Date	Title

Please return this form to your program overseer. Providing this information will allow your company to be recognized externally and report their total pro bono giving.

REPORTING CAPTAIN DUTIES

INSTRUCTIONS: Fill out this letter and give to your community affairs department. You should also give a copy to your nonprofit partner.

This letter is not meant to serve as an evaluation form, so it shouldn't have feedback about project work added. You should, however, feel free to personalize the language as long as the key fields (nature of project work, fair market value of services) remain intact.

PRO BONO SERVICE PROJECT RECOGNITION LETTER

[Sponsoring Company and Address]

[Date]

[Nonprofit Name and Address]

Dear [Nonprofit Partner],

We are pleased to award you with pro bono services valued at [dollar value]. Our team of [#] employees has collectively given [#] hours of pro bono service and provided you with [briefly describe project accomplishments or deliverables]. We hope that it will continue to strengthen your operations and we thank you for all of your support during the project.

Best wishes,

[Team Lead / Reporting Capitan]
[Company]

REPORTING CAPTAIN DUTIES

INSTRUCTIONS: Fill out the contact information and dollar value in this letter and give to the nonprofit partner to sign and return to community affairs.

This letter should not be used as an evaluation or to offer feedback on the pro bono project. It is designed only to recognize the dollar value of the pro bono service contribution and allow the sponsoring company to track and report their pro bono work.

PRO BONO SERVICE PROJECT INVOICE

[Nonprofit Name and Address]

[Date]

[Sponsoring Company and Address]

Dear [Team Lead],

Thank you for your pro bono service grant contribution valued at [dollar value]. We are very grateful for your donation of [briefly describe project accomplishments or deliverables]. Your team has helped strengthen [nonprofit name] and we are thrilled to have received your professional skills and expertise.

[Add a testimonial or brief story to be used by Community Affairs for reporting purposes only]
e.g. Your pro bono contribution has helped us by….
Your pro bono contribution has allowed us to…
As a result of your pro bono project, we can now….

Thank you!

Warm Regards,

[Nonprofit Partner]

02 PROJECT REPORTING TEMPLATE

If you already have an hour-tracking system in place, this worksheet will help you determine the fair market value of your pro bono projects.

PRO BONO PROJECT REPORTING TEMPLATE

This reporting tool allows your company to value and report its pro bono activities. By completing this form at the conclusion of your pro bono project, you can be sure your work will be included in your company's pro bono giving totals. Reporting back to your Community Affairs department will allow your work and the company's pro bono program as a whole to be recognized externally and you may qualify your nonprofit for additional funding. The directions listed in Part B will walk you through how to complete the fields below.

A) ENTER THE NONPROFIT PARTNER AND PROJECT DETAILS				
Nonprofit Name				
Project Title				
Project Focus	□ Medical Services □ Board Services □ Strategic Services	□ Financial Services □ Marketing/Branding □ Real Estate/Facilities	□ Technology Infrastructure □ Interactive/Website Technology □ Program Development	□ Fundraising □ Legal □ Other Services
Nonprofit City, State			EIN	
Mission Focus	□ Religion □ Health	□ Arts, Culture, & Humanities □ International/Foreign Affairs	□ Education □ Human Services	□ Environmental/Animals □ Public and Social Benefit

	Column A: Pro Bono Billing Rate		**Column B:** Hours Given		**Column C:** Total Contribution
Name	$	x		=	
Name	$	x		=	
Name	$	x		=	
Name	$	x		=	
Name	$	x		=	
Name	$	x		=	
TOTAL PRO BONO PROJECT CONTRIBUTION					$

B) DETERMINE THE VALUE OF YOUR PRO BONO PROJECT

1. Enter the number of hours donated by each individual in column B – hours given
2. If you know the fair market value of your own or any team member's work, list that hourly fee in Column A
3. If you do not know the fair market value of services, begin by determining each volunteer's experience level (if you don't know, select mid-level) and the primary type of work they performed for the project (if you don't know, chose other) from the table below. Locate the corresponding hourly wage and enter in Column A.
NOTE: These conservative hourly rates were created by the Taproot Foundation in partnership with the Committee Encouraging Corporate Philanthropy (CECP). They are defensible hourly rates but are adjusted down to account for typical nonprofit and pro bono discounts.

Skill Level	Marketing, Advertising, PR	Accounting, Financial Services	Architecture, Engineering, Construction	Strategic Consulting, HR, IT, Organizational Design	Legal, Medical	Other
Entry Level	$ 80	$ 90	$ 75	$ 100	$ 200	$ 85
Mid Level	$ 100	$ 135	$ 100	$ 150	$ 250	$ 120

Executive	$ 150	$ 200	$ 145	$ 225	$ 320	$ 180
4. Multiply Column A by Column B for each volunteer and enter in Column C – total contribution **5.** Add up the total hours listed for each volunteer in Column B and enter in the blue box above **6.** Add up all of the values in Column C to find the total project value and enter in the gold box above						

This form should be completed and given to your community affairs contact at the close of your project.