POWERING PRO BONO

The comprehensive resource for companies engaging their employees in pro bono service.

taproot FOUNDATION

INTRODUCTION

If you're considering starting a pro bono program, you're probably wondering, where do I even begin? Like the construction of a house or the launch of a new campaign, every program or large task begins with a plan. Many companies come to the Taproot Foundation to learn about pro bono program design, and a small investment of time up front can have big payoffs when it comes to program results.

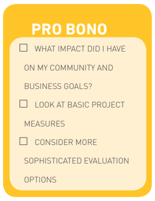
This resource is meant to give you a high-level overview of all of the pieces that go into designing a successful program – from strategy to execution to evaluation – in order to help you build a plan for your own program development.

INTERACTIVE OVERVIEW

Powering Pro bono is a book, guide and a tool all wrapped into one. Each section is divided into an executive summary and an overview of established best practices or models - identified and developed by Taproot over our 10+ years of experience. You can jump between sections anytime by using the handy color-coded bookmarks at the bottom of each page. Embedded links throughout the document are identified with a grey highlight or a 'MORE INFO →' marker. At the end is an Appendix - packed with case studies and extended overviews of the best practices or models.

HYPERLINK OVERVIEW

Clicking a bookmark will take you to the corresponding sections' opening checklist



SECTION ▶ BEST PRACTICES/MODEL → **OVERVIEW**

APPENDIX ▶ BEST PRACTICES/MODEL → **EXTENDED OVERVIEW**

Powering Pro Bono

New York, NY

USA

For more information about the Taproot Foundation visit Taprootfoundation.org.

Taproot Offices :

San Francisco | New York | Los Angeles | Chicago | District of Columbia

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SECTIONS

PRO BONO BUSINESS CASE

- ☐ **WHAT DO I WANT MY PROGRAM TO ACCOMPLISH ?**
  - ☐ COMMUNITY GOALS
  - ☐ BUSINESS GOALS
- ☐ **INTERNAL IMPACT AREAS**
  - ☐ HUMAN RESOURCES
    - ☐ INCREASE EMPLOYEE SATISFACTION
    - ☐ ENHANCE RECRUITMENT
    - ☐ MORE INTERCONNECTED WORKPLACE
  - ☐ REPUTATION
    - ☐ EXPANDED NETWORK
    - ☐ IMPROVE BRAND AND PUBLIC RELATIONS
    - ☐ SUSTAINED LICENSE TO OPERATE
  - ☐ INNOVATION
    - ☐ CLIMATE OF INNOVATION
    - ☐ NEW OR IMPROVED PRODUCTS
    - ☐ ENHANCE MARKET PENETRATION

Content in this section was created via a collaboration between Taproot and Pro Bono Lab.

About Pro Bono Lab
Pro Bono Lab is a French nonprofit organization that envisions a day when nonprofits, citizens and companies will act together to remedy the most pressing social challenges. To achieve this goal, we offer mission-driven organizations capacity building services by partnering and engaging volunteers in pro bono projects.

WHAT DO I WANT MY PROGRAM TO ACCOMPLISH?

Before thinking about how or what, anyone looking to start a pro bono program should always begin by asking themselves, "Why am I doing this?" Your program can make an impact in many ways and on many different audiences. Identify what specifically you want your program to accomplish and then design your program around that - **pick a program model that is most aligned with what you want to achieve for your community partners, your employees and your business.**

COMMUNITY GOALS

Designing your project around having impact on partner organizations is the top priority of pro bono program development, but there are many different types of impact that your program can achieve based on how it's designed. For example, you may wish to...

- Help existing partners operate more efficiently and effectively
- Build local community relationships
- Target an issue area or cause
- Increase the capacity of partner organizations to better achieve their missions
- Enhance your giving program to reach new partners, or to reach existing partners in a new way

BUSINESS GOALS

You should also consider how you hope pro bono service can provide value to your company - both internally and externally. For example, you may hope to...

- Achieve recognition for having an innovative giving strategy
- Expand your community impact without adding significant costs

- Gain brand visibility
- Improve your reputation and leadership role within the corporate philanthropy field
- Offer team-building and leadership opportunities for employees
- Recruit new talent by offering a unique way to give back
- Demonstrate your company's core competencies
- Drive revenue or sales by connecting with clients/customers and demonstrating commitment to the community
- Foster innovation through new, field-based experiences

SCALING GOAL

At this stage, it is also important to put some thought into the general scale of program you would like to build.

- Do you hope to launch a national program and offer opportunities in multiple geographies? Or will you start small and work your way up?
- About how many employees and community partners do you hope to engage in the short-and long-term?

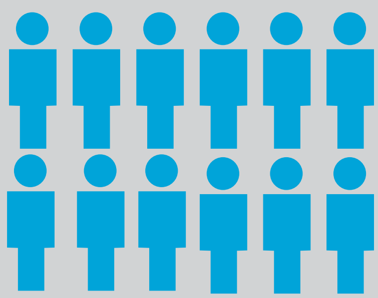
Considering these questions at the outset of program development will guide decisions moving forward and ensure that the quality of services delivered stays consistently high.

KEY TAKEAWAY: Get a clear sense of desired benefits and outcomes, such as community impact, business benefits, and the scale of the program you are aiming for - before you start designing the details - your program will be stronger and achieve more as a result!

Pro bono programs can positively impact and advance your business in a variety of ways. Taproot has identified three primary categories of impact:

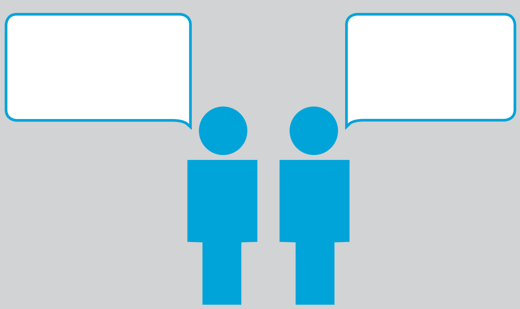
- Human Resources
- Reputation
- Innovation

Knowing the specific areas within each of these categories and targeting those that are the most aligned with your own business goals, will maximize your business gains.



HUMAN RESOURCES

You want a program that is a new approach to professional development, will increase employee satisfaction, enhance recruitment, or create a more interconnected workplace.



REPUTATION

You want a program that will help you expand your network, improve brand and public relations and/or strengthen your sustained license to operate.

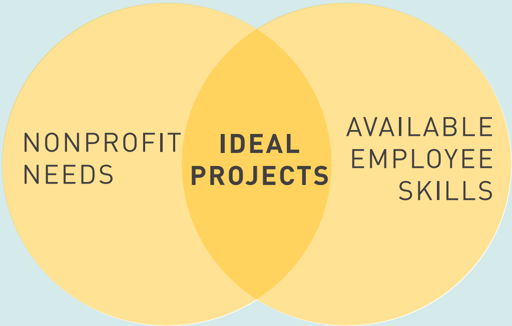
INNOVATION

You want a program that will foster a climate of innovation, result in new or improved products, and/or expand into new markets or enhance your current market penetration.

More info about each of the impact models continues on p.32

COMMON PRO BONO MODELS

- ☐ IDENTIFY NONPROFIT NEEDS
  - ☐ USING SURVEY OR INDUSTRY DATA
  - ☐ USING SELF-REPORTED NONPROFIT NEEDS
  - ☐ ASKING EMPLOYEES WHO SERVE AS BOARD MEMBERS
  - ☐ USING THE TAPROOT FOUNDATION PROJECT FINDER
- ☐ IDENTIFY EMPLOYEE EXPERTISE
  - ☐ FINDING INTERNAL FUNCTIONAL CHAMPIONS
  - ☐ ASKING THE HUMAN RESOURCES DEPARTMENT



- ☐ HOW DO I KNOW WHICH PROJECTS WILL WORK?
- ☐ EIGHT PROVEN MODELS OF PRO BONO SERVICE
  - ☐ LOANED EMPLOYEE
  - ☐ FUNCTIONAL COACHING & MENTORING
  - ☐ MARATHON
  - ☐ STANDARDIZED TEAM PROJECTS
  - ☐ OPEN-ENDED OUTSOURCING
  - ☐ SECTOR-WIDE SOLUTIONS
  - ☐ GENERAL CONTRACTING
  - ☐ SIGNATURE ISSUE

COMMON PRO BONO MODELS

IDENTIFY NONPROFIT NEEDS

Understanding what your target partner organizations need is the first step in determining which pro bono projects make the most sense for your program. There are a variety of ways you can go about determining what your community partners most need – the simplest being to just ask them! As you consider your approach, you can think about...

USING SURVEY OR INDUSTRY DATA

By asking a range of partners about their top organizational challenges, you can get a good sense of the range of projects that might be most commonly needed. You can use a survey to ask organizations about the most pressing needs they might have, and you can group specific questions around common areas like marketing, IT, HR, strategic planning, and financial management. Alternatively, look for generally available market data that shows common areas of great need for the nonprofit sector.

USING SELF-REPORTED NONPROFIT NEEDS

If you are starting with a group of pilot projects, consider setting up interviews with a small number of prospective partner organizations. By having direct conversations with organizations about challenges that require immediate attention, you can isolate precisely the types of projects that would be most helpful for those organizations. Don't feel comfortable navigating a conversation about their areas of organizational need? Bring in someone who does! Your employee base is full of subject matter experts (marketing, IT, HR, etc.) who can be your functional representatives in conversations with organizations. Once you understand your target partners' specific needs, you can work with your internal functional champions – someone with knowledge of the skills required for various relevant types of projects – to establish who would have the necessary expertise to meet those needs.

ASKING EMPLOYEES WHO SERVE AS BOARD MEMBERS

If your employees already sit on boards for area community groups, they are probably very familiar with the challenges their organizations are currently facing. These employees can help you understand what types of pro bono projects would be most beneficial, so it would be advantageous to request their help in designing successful pro bono projects.

USING THE TAPROOT FOUNDATION PROJECT FINDER

The Taproot Foundation has developed a working guide to match common nonprofit needs with descriptions of readily available professional skills. Using this interactive tool on Taproot's website, you can search by skill or project type to find suggestions. If you know the general project types your nonprofits are requesting, or if you have a good sense of the specific departments within your company that are looking to get involved, you can use the map to guide decision-making and take the guesswork out of project selection. You can also encourage your community partners to use the map in advance of your conversations with them so that they can create a list of projects that are of interest to them!

KEY TAKEAWAY: Before you build a pro bono program from scratch, reach out to potential partners and ask them about the top issues they currently face – management, communication, operational challenges, etc. – and about what professional services might help them the most.

IDENTIFY EMPLOYEE EXPERTISE

Identifying the relevant and available skill sets that your company offers is a key next step in building a pro bono program. Explore not only the core competencies of your company but also other highly-concentrated areas of employee expertise. You can determine what skills your employees have to offer by…

FINDING INTERNAL FUNCTIONAL CHAMPIONS

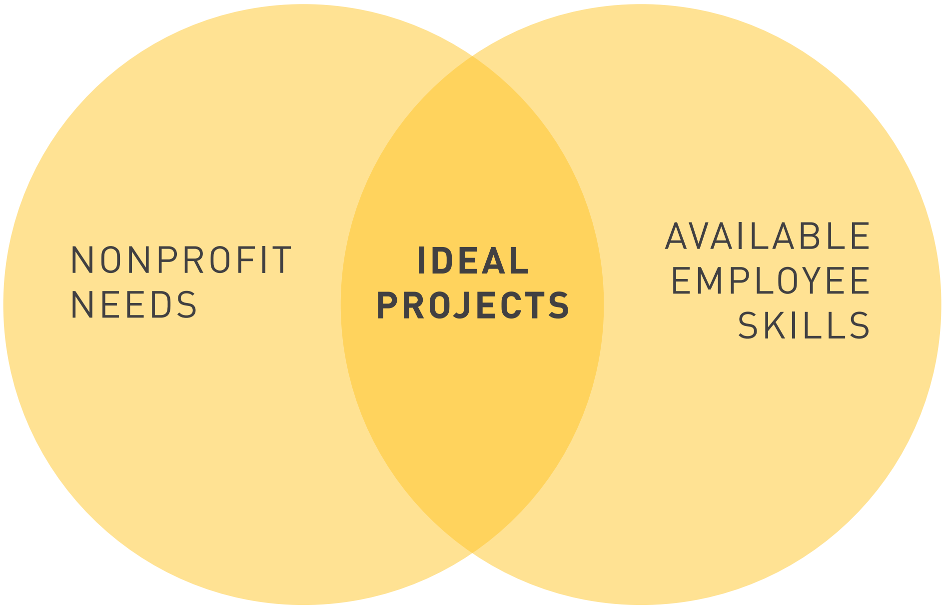
Within every company, there are individuals who both buy into the idea of pro bono service, and possess knowledge about what skills are housed in various company departments. While these functional champions are not always the most senior staffers, they will often have a good sense of available skills and can connect you with more senior leaders who have decision-making authority.

ASKING THE HUMAN RESOURCES DEPARTMENT

If you're especially lucky, your company might be one of the few where HR already has a "magic spreadsheet" available – that is, a document or database that already houses data around the skill type and experience level of employees by region or department. Gaining access to this is a virtual jackpot in for gaging the presence and concentration of relevant employee skills.

KEY TAKEAWAY: Find out what professional skills your employees have to offer. By learning what specific skills are available and where those employees work, you can start to think about the projects that make the most sense for your company. Remember to focus on areas of real experience so your community partners get the level of support they need.

HOW DO I KNOW WHICH PROJECTS WILL WORK?



8 MODELS OVERVIEW

Pioneering companies engaged in the pro bono movement are demonstrating that effective pro bono service can come in many different shapes and sizes.

Whether your goal is to build the capacity of your strategic nonprofit partners, find a solution to a common nonprofit sector challenge, or catalyze change in a specific issue area, it is possible to build a pro bono program aligned for each type of impact. The formula for success is straightforward:

- Identify what your company does best and focus on your employees' proficiencies
- Assess how to make this resource available for public benefit
- Decide what organizational resources your company is willing to leverage to make the pro bono program a success

We have tapped our network to find examples of organizations from across sectors that have truly made pro bono service their own, adapting different models of pro bono service delivery to address a variety of social issues and business goals. In this section are eight best practice examples of the ways in which pro bono can take root in your company.

While we have highlighted three examples, this is not an exhaustive list of pro bono models. As the pro bono ethic continues to grow, we expect creativity and innovation to enable additional models to emerge.

- How do we find a model that fits our company?
- How do we deliver the greatest impact to our pro bono clients?
- How do we leverage our investment in the program to drive the most business value?

The eight models lay a foundation for answering these questions, and it will be up to you to embark on the path to answering them for your company.

READY FOR ACTION?

TRY ONE OF THESE 8 MODELS OF PRO BONO SERVICE

STANDARDIZED TEAM PROJECTS

Individuals are placed on teams, each with specific roles and responsibilities. Each project is scoped and structured around a standard deliverable based on the needs of the nonprofit partners.

MORE INFO → 57

SIGNATURE ISSUE

The combination of formal pro bono work with additional corporate assets for the purpose of leveraging significant internal resources against a specific social issue.

MORE INFO → 61

LOANED EMPLOYEE

An employee is granted a sanctioned and compensated leave of absence to pursue a pro bono project.

MORE INFO → 53

FUNCTIONAL COACHING AND MENTORING

Employees match up with their nonprofit peers, form a relationship, and share functional expertise.

MORE INFO → 55

OPEN-ENDED OUTSOURCING

A company makes its services available to a specific number of nonprofit organizations on an ongoing, as needed basis.

MORE INFO → 58

SECTOR-WIDE SOLUTIONS

A company creates a deliverable pro bono that can be applicable to all nonprofits across the sector.

MORE INFO → 59

MARATHON

A company pools human capital resources on a pro bono project within a short, predetermined timeframe (usually 12-24 hours) to deliver a mass volume of deliverables.

MORE INFO → 56

GENERAL CONTRACTING

An entity coordinates and oversees internal and external resources, promoting cross-sector collaboration to address a specific social problem.

MORE INFO → 60

More info about each of the 8 models of pro bono service continues on p.53

PRO BONO MANAGEMENT

- ☐ **HOW TO GET YOUR PROGRAM STARTED**
- ☐ **HELPFUL TOOLS**
  - ☐ SCOPE DOCUMENT
  - ☐ SERVICE AGREEMENT
  - ☐ PROCESS OVERVIEW
  - ☐ LIABILITY WAIVER
- ☐ **SUCCESSFUL PROJECT CHECKLIST**
  - ☐ THE PROJECT IS COMPLETED AND DELIVERED IN A TIMELY MANNER
  - ☐ THE DELIVERABLE IS IMPLEMENTABLE AND SUSTAINABLE
  - ☐ THE PROJECT MEETS OR EXCEEDS BOTH THE CLIENT AND VOLUNTEERS' EXPECTATIONS
  - ☐ ALL PARTICIPANTS REPORT A HIGH DEGREE OF SATISFACTION WITH THE ENGAGEMENT
  - ☐ THE CLIENT REPORTS THE PROJECT MADE AN IMPACT
- ☐ **COMMON OBSTACLES TO A PROJECT'S SUCCESS**
  - ☐ TEAM TURNOVER
  - ☐ TIMELINE CREEP
  - ☐ SCOPE CREEP
- ☐ **PLAN HOW YOU WANT TO GROW**
  - ☐ LAY OUT THE STEPS NEEDED TO ACHIEVE YOUR TARGET
  - ☐ LEVERAGE EXISTING TECHNOLOGY
- ☐ **PRO BONO MANAGER JOB DESCRIPTION**

PRO BONO MANAGEMENT

HOW CAN I GET MY PROGRAM STARTED?

Once you've gotten a general sense of what project types are best for the program you're developing, the next step is to consider what it will take to get those projects up and running. What did you decide during your strategy-setting conversations? Keeping your launch plan in line with your articulated goals and desired scope will ensure you aren't biting off more than you can chew. Many companies start small, testing the program with a group of pilots in high-potential geographies where there is a good alignment of employee skill and nonprofit need.

You can always scale up, but starting small lets you experiment without the up-front risk and commitment of a larger-scale program.

HANDPICKED PILOTS

If you decide that a group of pilot projects is right for you and you want to move forward quickly, sometimes it is best to just handpick a few pilot projects. Begin by revisiting the nonprofit needs and available employee skills you identified earlier.

- Are there particular departments or managers that are excited and ready to start pro bono projects?
- Are there individuals or teams who have done pro bono work before?
- Do you have a group of community partners with specific needs that you know you can address?

Contact the nonprofits and have in-depth conversations about possible projects – including a more specific talk about the realistic timeline and project scope. Decide with each partner exactly what they would like to accomplish and how long it could take. Then, you can go back to your subject matter experts with specific types of project in mind (or have them join your conversations with nonprofits in the first place!) and ask them to think about who would be best suited to staff a volunteer team or help you target some volunteer recruitment outreach.

Starting small is key – limiting the number of projects up front (we often suggest a minimum of two but no more than four or five) helps ensure high-quality results and manageable oversight duties. It also allows you to have a sample pool to test your model and provide you with learnings. It's also not a bad thing if that helps set the precedent that "not just anybody" can do pro bono– the success of pro bono service depends on the right individuals with specific skills.

NEED TO MAKE YOUR LAWYERS HAPPY?

We have also developed a sample Liability Waiver that articulates the legal responsibility of the pro bono provider (your company) and the client.

HELPFUL TOOLS

After you select specific pilots, you can build the tools needed for each project. At a minimum, we suggest each project should have a:

- Scope Document to pre-define what will and will not be completed during the course of a project
- Service Agreement that establishes project commitment, expectations, and guidelines
- Process Overview that provides a high-level summary of project work phases, key milestones at each phase, and key deliverables of each phase for both the client and volunteer teams.

Depending how turn-key you want project execution to be, you can also think about what other project-specific tools might help guide pro bono volunteers. While the participants will generally create (or customize) the project-specific tools they need using their technical expertise, you can also think about tools that can be used on all projects – much like the service agreement or template versions of a scope document – to help ensure a smooth, successful start. The end goal is to ensure that you, the community partner, and the employee volunteers have a clear (and matching!) understanding of what the project will produce, how it will happen, and when.

HOW TO RUN SUCCESSFUL PROJECTS

A SUCCESSFUL PROJECT CHECKLIST

- The project is completed and delivered in a timely manner.
- The deliverable is implementable and sustainable.
- The project meets or exceeds both the client and volunteers' expectations.
- All participants report a high degree of satisfaction with the engagement.
- The client reports the project has made an impact.

For the sake of you and your community partners, it is critical to set up your projects with a focus on hitting not one but all of these targets by incorporating them into participant expectations and your own program development process.

When projects get started, there are a number of common challenges that can arise and be obstacles for your projects' success, including:

- Team turnover
- Timeline creep
- Scope creep

Think about possible solutions to these challenges in advance. How can you set up a program infrastructure that can help avoid these issues? Who can you call on to be available to your employees and community partner to work through difficulties?

KEY TAKEAWAY- Whether you begin with a small group of pilot projects or start with a larger pro bono effort, you should have some basic tools and templates in place to guide consistent and high-quality project execution. Consider basic items that define project scope, offer a service contract to set expectations, and lay out the work plan in advance to ensure expectations are met for all program participants and recipient organizations

HOW CAN I SCALE MY PROGRAM?

After your initial pilot program has been designed and a group of pilot projects are off the ground, it may be time to think about scaling the program to grow your impact. When expanding a pro bono program to reach new people and partners, it is important not just to have a bigger impact – but to also have a better impact. By expanding in a strategic and supported way, your program can use consistent intake and management procedures to drive impact on a bigger scale. To reach new partners and engage more volunteers...

ALREADY HAVE PROJECT TOOLS?

If your company is in an industry where project management tools are a part of daily operations, consider adapting those documents for your pro bono program. Standard oversight tools such as project timelines, project work plans, deliverable templates, milestone completion tracking forms, and other process management tools will be as beneficial on pro bono projects as they are on standard business engagements.

PLAN HOW YOU WANT TO GROW

Growing your program can take many forms. Do you want to simply increase the volume of projects and number of employees? Do you want to develop new project offerings? What geographies are you targeting? Are you hoping to involve other offices and staff? Are you hoping to simply expand involvement in a single location? Do you want to open up the application process to new partners? Any of these methods will increase the size and impact of your program, but you should have a careful decision-making process, using learnings from your pilots, to determine the most appropriate or suitable growth option for your program.

LAY OUT THE STEPS NEEDED TO ACHIEVE YOUR TARGET

Once you have established realistic growth targets, decide on a plan to reach those goals. If you're expanding the types of projects offered, you should find subject matter experts who can guide the development of new project tools and work plans. If you want to reach additional office branches or locations, find an individual based at the new site to help publicize the program and recruit participants. If you're reaching out to new nonprofit partners, send out revised criteria information and applications to new contacts or ask groups with whom you already have relationships to suggest your program to peer organizations.

Regardless of how you are growing, you will also have to consider how to manage the expanded scope of your program. It will be critical to design a system that is capable of handling additional intake, oversight, and evaluation needs for volunteers and partners. You might explore employee-driven management options, including finding volunteer functional leaders who are willing to handle the bulk of project scoping, approval, and oversight duties and take it off of your plate. Whether this means dedicating additional staff bandwidth to these duties or looking outside for automated solutions, it is important to recognize the impact that scaling a program has on your department and staff.

LEVERAGE EXISTING TECHNOLOGY

After your program reaches a certain size, the easiest and most efficient way to integrate scalable intake, execution, and oversight procedures is to use existing technology to streamline program operations. This includes taking systems you already have in place and modifying them to serve your pro bono program. Keeping project tools accessible on your company's intranet, adding information and bulletins to a company-wide newsletter, or working with your existing volunteer management vendor or grant-management program to add pro bono-friendly questions/fields are all possible solutions. Automating some aspects of volunteer and project management is a reliable solution to scaling a program in a systematic and manageable way.

KEY TAKEAWAY: When you are ready to grow your program, begin by defining what "growth" means for your company. Then, lay out the steps needed to reach your desired growth, which include accounting for the expanded program scope with revised participant intake, project oversight .and program evaluation needs and resources. Don't miss the opportunity to explore additional models of pro bono service and think about your overall strategic goals.

SUCCESSFUL PROJECT BEST PRACTICES

THESE BEST PRACTICES ENSURE THAT PROJECTS WILL BE SUCCESSFUL FOR ALL PARTIES.

THE PROJECT IS COMPLETED IN A TIMELY MANNER

Time is the medium of exchange when setting up pro bono projects. Creating accurate project timelines minimizes conflict and increases the likelihood of sustaining the relationship between the pro bono consultant and client.

MORE INFO → 63

THE DELIVERABLE IS IMPLEMENTABLE & SUSTAINABLE

The deliverable is only a relevant if the client can implement and sustain it after the project relationship is over.

MORE INFO → 64

THE CLIENT'S AND PRO BONO CONSULTANTS' EXPECTATIONS ARE MET OR EXCEEDED

Establish a workflow that both focuses on project impact and emphasizes mutual satisfaction for the pro bono Consultants and client.

MORE INFO → 65

ALL THE PARTIES INVOLVED REPORT HIGH SATISFACTION WITH THE GROUP'S INTERACTIONS

At the beginning of a project, design high quality and feasible deliverables.

MORE INFO → 66

THE CLIENT REPORTS THE PROJECT MADE AN IMPACT

Every element of a pro bono project should be crafted with the client's desired impact in mind.

MORE INFO → 67

More info about the 5 ways to ensure successful projects continues on p.62

PRO BONO MANAGER JOB DESCRIPTION

PRO BONO MANAGER

The pro bono manager leads the growing pro bono efforts at ACME, Inc. They work across the community as well as ACME, Inc.'s leadership and employees to optimize the company's philanthropic and talent outcomes. In addition to overseeing individual projects and work with specific community-based partners, the pro bono program manager will build and own the strategy of the program at large, ensuring all pro bono work is aligned for maximum impact on the community and our employees.

RESPONSIBILITIES

- Identify, screen and engage with nonprofit organizations to create strategic partnerships that enable the community to access the full resources of ACME, Inc.
- Build and maintain the core infrastructure to support all pro bono engagements- including participant trainings, application and screening process, evaluations, impact reporting, etc.
- Equip and empower functional leaders (e.g. Director of Marketing) to engage their teams in pro bono projects
- Partner with human resources to integrate the employee experience and benefits into ACME, Inc.'s talent platform
- Build the ongoing business case for pro bono and support it by reporting on community and business results and stories of impact
- Coordinate with volunteerism and philanthropy to create continuum of resources for nonprofit partners and investment opportunities for employees

REQUIREMENTS

- Master networker and influencer
- Deep understanding of the corporate structure, business model and decision making process(es)
- Demonstrated penchant for working across sectors (nonprofit, corporate and government)
- Experience managing diverse teams across functional groups
- Sharp managerial instincts and the ability to motivate individuals and cultivate effective teams
- Passion and enthusiasm for strengthening nonprofit organizations through capacity building work
- Desire to drive and own the strategy and direction of the program while also possessing a willingness to dive in and own the execution of the details when needed
- Core project management and consulting skills
- Basic understanding of all common business functions (marketing, finance, IT, etc.). Graduate degree preferred
- Proven ability to use data and storytelling to generate support and drive change management

PRO BONO EVALUATION

- ☐ **WHAT IMPACT DID I HAVE ON MY COMMUNITY AND BUSINESS GOALS?**
  - ☐ LOOK AT BASIC PROJECT MEASURES
  - ☐ CONSIDER MORE SOPHISTICATED EVALUATION OPTIONS
- ☐ **HOW DO I VALUE MY EMPLOYEES TIME?**
  - ☐ LET YOUR EMPLOYEES KNOW THEY'LL BE EXPECTED TO TRACK AND REPORT
  - ☐ WHEN IN DOUBT, USE INDUSTRY-ACCEPTED PRO BONO RATES TO CALCULATE PROJECT VALUE
    - ☐ EMPLOYEE TIME VALUATION REFERENCE TABLE
  - ☐ IF POSSIBLE, USE EXISTING MARKET VALUE OR COMPANY BILLING RATES TO CALCULATE PROJECT VALUE

START OFF ON THE RIGHT FOOT

The best way to set yourself up for an effective evaluation process is to start at the very beginning. When you are setting up your program in the first place, stop to articulate what outcomes you're hoping to see as a result of this program. What will tell you if you are hitting your goals? In addition, at the start of each project, ask your partner organizations to spell out what outcomes they want the pro bono project to bring about. These tactics will give you clear goals to measure against and keep your projects on track.

WHAT IMPACT DID I HAVE ON MY COMMUNITY AND BUSINESS GOALS?

Remember when you spelled out all of your goals for your program? Your evaluation tactics should refer directly back to those goals.

Depending on your program goals, there are a range of indicators you can use to track the impact of your new pro bono program. Some indicators are more straightforward to capture and measure than others. By designing surveys, gathering information through interviews, or compiling raw program data, you can not only understand how your program is working and identify areas for improvement, but also prepare yourself to report internally and externally on the program's success .

LOOK AT BASIC PROJECT MEASURES

Ask your partner organizations a standard set of questions at the conclusion of each pro bono project by surveying them or conducting debrief interviews. At a minimum, design your surveys or interviews to assess community partner satisfaction with both the outcomes and the process and capture constructive feedback. Both qualitative and quantitative questions are useful in getting a complete picture of how the project went. It is also important to survey your employees. Ask them about satisfaction, team dynamics, ways to improve the project recruiting and management process, and so on. While these measures are helpful basic elements of an evaluation model, you should always strive for more sophisticated assessments whenever possible.

DID YOU MAKE THE GRADE?

Remember the Five Characteristics of High-Quality Pro Bono Projects? At the most basic level, your post-project evaluations should be going down that list and evaluating how well a project did at hitting each one of those tenets.

CONSIDER MORE SOPHISTICATED EVALUATION OPTIONS

While it is very important to measure basic satisfaction and capture feedback from program participants, more sophisticated tracking includes impact and ROI measurements. By looking at changes in the ability your community partners have to deliver on their missions, you can demonstrate the successes of project work beyond basic "how did it go?" measures. On the partner side, help organizations define indicators and measures that you can review at the end of the projects to assess the impact made on the organization itself, its mission and, if possible, the community. On the corporate side, take a closer look at some of the professional development, leadership, and brand changes that resulted from project participation, which can provide valuable evidence of the business value impact of a pro bono program. And remember, not all impact happens right away. Consider checking in again six to twelve months later for some more data and insights.

KEY TAKEAWAY- Plan for program evaluation – and be sure you are evaluating more than employee satisfaction. Understanding how well your projects mapped against the common success factors and goals you articulated will not only offer ideas for future improvement, but will also provide stories and statistics for internal and external reporting.

HOW DO I KNOW THE VALUE OF MY EMPLOYEES' TIME?

Once a program is up and running, it is to your advantage to track and value the hard work of your employees. Not only will this help you monitor your program internally, but there are also numerous external reporting options. Being able to include pro bono giving totals and the stories of individual projects will help showcase your company's efforts to the outside world in an interesting and unique way. But in order to do this, you must be diligent about tracking and valuing the projects as they happen – including requiring reporting as part of project execution.

TRACKING IS WIN-WIN

Project valuation helps your community partners too. Many nonprofit organizations in particular benefit from including "in-kind" or "cash-equivalent" donations in their reporting and grant writing. Providing your partners with value estimates for your pro bono services can help them secure resources from other sources in the future.

LET YOUR EMPLOYEES KNOW THEY'LL BE EXPECTED TO TRACK AND REPORT

Offer explicit instructions to your employees that detail how and when they should report the time they spend on pro bono projects. Depending on the size of the program you are designing, it may make sense to have volunteers e-mail a single program manager directly. Or, if your program is large enough to require an automated solution, there are several options for on-line hour tracking that can be customized to fit your specific needs. Once you determine the total hours worked by employees on projects, you can then calculate the project value in several ways.

WHEN IN DOUBT, USE INDUSTRY-ACCEPTED PRO BONO RATES TO CALCULATE PROJECT VALUE

Taproot Foundation and CECP (Committee Encouraging Corporate Philanthropy) released industry standards for pro bono service hourly rates in early 2009. By asking employees about their skill level and the nature of work they performed for pro bono projects, you can use Taproot's CECP-approved hourly rates to determine each employee's pro bono rate. Then, by simply multiplying the number of hours worked by the appropriate rate, you will reach an approximate value of each individual's pro bono contribution. In the absence of specific skill information, you can also use the rounded average of $120 per hour.

EMPLOYEE TIME VALUATION REFERENCE TABLE.

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

IF POSSIBLE, USE EXISTING MARKET VALUE OR COMPANY BILLING RATES TO CALCULATE PROJECT VALUE

If your company is accustomed to billing clients on an hourly basis, you are already set up to use that market value for pro bono projects. The employees on projects are likely using the same professional skills they use in their normal client work, so it makes sense to use existing billing rates – they are the most accurate representation of the value of your employees' time. Alternatively, you can benchmark the market rate for services firms delivering similar project types and adapt the rate conservatively as an appropriate, market-tested value.

KEY TAKEAWAY- Establishing hours tracking as an expected part of program participation will mean that determining the dollar value of each project is an easy final step once project work is finished. If your company already has billing rates as part of standard business practice, use those rates for the most accurate estimation of project value.

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. issue area, 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 participants to involve in the short- and long-term future
- ☐ Decide whether you will launch a scaled program or start with hand-picked pilot projects
- ☐ Look for existing project tools and management best practices
- ☐ Create tools to ensure smooth and consistent program operation
- ☐ Determine an outreach strategy to recruit participants and partner organizations
- ☐ Think about program growth in terms of number of participants, physical location, model of pro bono service, or type of projects offered
- ☐ Design an evaluation model to capture feedback and track impact and results
- ☐ Prepare standard evaluation tools to capture employee feedback
- ☐ Prepare tools to measure community partner satisfaction and gather feedback
- ☐ Establish a system to track employee participation and determine project values

☐ LAUNCH

- ☐ Finalize list of project participants and conduct any remaining recruiting for employees
- ☐ Notify participants that they have been selected to join projects
- ☐ Conduct partner organization training and employee training to prepare both for service
- ☐ Support project launch and troubleshoot as needed; gather feedback and best practices from participants
- ☐ Follow through with evaluations and integrate lessons learns for future projects

☐ EVALUATE

- ☐ Track and report on what you have accomplished
- ☐ Compile and analyze evaluation results
- ☐ Consider more sophisticated tools to measure impact on partner and ROI
- ☐ Consider external reporting opportunities to highlight your program's accomplishments

APPENDIX

PRO BONO BUSINESS CASE

SUMMARY, EXTENDED OVERVIEWS, & CASE STUDIES

BUSINESS DRIVERS	BUSINESS IMPACTS	BUSINESS OUTCOMES
HUMAN RESOURCES	Innovative Professional Development Document p.33	▸ Creates a broader range of training opportunities for employees to sharpen skills that are directly applicable to the work environment ▸ Aids in transitioning employees to new jobs or across divisions, or to prepare for or ease into retirement. ▸ Increases opportunities to measure employee performance, including potential to promote outstanding employees
	Increased Employee Satisfaction Document p.34	▸ Boosts employees' pride in their own skills and in their company ▸ Enhances understanding of and commitment to the company's culture and values ▸ Increases staff motivation, resulting in higher productivity and reduced absenteeism
	Enhanced Recruitment Document p.35	▸ Increases attractiveness of the firm to potential recruits, especially Gen Y professionals ▸ Provides unique opportunities to engage non-employee participants in pro bono projects, creating recognition for the company
	More Interconnected Workplace Document p.36	▸ Fosters cross-functional communication across the company ▸ Deepens teamwork and collaboration skills ▸ Improves relationships between employees and line of HR managers ▸ Employees gain broader visibility within the company
REPUTATION	Improved Brand and Public Relations Document p.37	▸ Increases visibility and brand recognition ▸ Enhances positive perception ▸ Employees and partners are empowered as brand ambassadors ▸ Effective public press mentions, at minimal incremental marketing costs
	Stronger Relationships and Network Document p. 38	▸ Strengthens, non-transactional relationships with priority stakeholders such as clients, business or community partners ▸ Heightens visibility of the company's expertise ▸ Generates business development opportunities
	Sustained License to Operate Document p.39	▸ Reduces exposure to risks such as public criticism or negative government decisions ▸ Increases stakeholder support for the company during possible periods of controversy or negative PR
INNOVATION	Fosters A Climate of Innovation Document p.40	▸ Stimulates employees' creativity, productivity and commitment ▸ Fosters new ways of thinking and entrepreneurial culture
	New or Improved Products Document p.41	▸ Develops new services and products for social needs developed to meet social needs that can then be ultimately sold commercially ▸ Improves existing products that integrate the end-user innovations generated on pro bono projects
	New Market or Enhanced Penetration Document p.42	▸ Improves understanding of the challenges, priorities, and large unmet needs of new markets and niches to be served ▸ Broadens geographic presence and reaches clients that are not currently served by the company such as nonprofits or small companies

INNOVATIVE PROFESSIONAL DEVELOPMENT

Pro bono offers professional development opportunities that sharpen skills, highlight high performers, and prepare employees for workplace transitions.

Pro bono can be leveraged as an innovative, attractive, and cost-effective professional development program. Pro bono programs can sharpen specific hard skills that are directly applicable to the work environment and develop a broad range of soft skills that improve an employee's personal, management, and business effectiveness. While employees are given an opportunity to showcase their skills and get noticed by peers or senior executives, management may also seek to identify and promote high performers or reassign highly skilled but poorly matched employees. Pro bono service also enables staff to better deal with changes in their employment situation, to prepare for or ease into retirement, and to maintain their particular skill sets, which they may not otherwise have a chance to use in their day-to-day jobs.

RESEARCH FINDINGS

- 91 percent of surveyed corporate human resources executives believe that pro bono service would add value to training and development programs, and 90 percent agree that contributing business skills and expertise to a nonprofit can be an effective way to develop leadership skills.4
- A third of employee respondents cite improvement in multiple skills areas, including communication, networking, problem-solving, leadership, team-building, presentation skills, organization and time management, negotiation, and decision-making. This list has also been corroborated by management, with 75 percent reporting leadership development as a result of pro bono service.5
- Pro bono service is an effective way to train and develop employees who want to be self-directing, to tap into their previous experiences, and to complete real-life tasks and problems.6
- Using pro bono to develop the leadership skills of high potential employees service can be less expensive than recruiting new executives or providing traditional training.7

METRICS

- Percentage of employee skill development relevant to regular work (self-assessed and observed by line management)
- Performance and cost of pro bono service compared to performance and cost of training and development programs

CASE STUDY: GLAXOSMITHKLINE'S PULSE VOLUNTEER PARTNERSHIP

GlaxoSmithKline's PULSE Volunteer Partnership is designed to develop three unique skills: thinking flexibly, building relationships and enabling/ driving change. The company views these three skills as part of a critical set of skills required for its future leaders. Prior to departure to the nonprofit organization site, the selected PULSE Volunteers and their line managers receive training and set specific measurable development and service goals in conjunction with their nonprofit supervising managers. In addition, with the 50 to 100 volunteers departing for as long as six months to work on their projects overseas, their co-workers at home need to step up to cover the volunteers' responsibilities – a process that greatly expands the significance of PULSE to include many more GSK employees, who gain valuable skills in doing more with less while enabling their co-workers to go abroad. Simultaneously, this helps build employee morale and unity across the company.

INCREASED EMPLOYEE SATISFACTION

Pro bono fosters employee loyalty, company pride, productivity, and commitment to company culture.

Pro bono boosts employees' pride and increases staff engagement and job satisfaction. Because pro bono enables employees to use their skills to give back, they not only feel better about their jobs, but also are proud knowing that their unique professional skills had a direct impact on their communities. They gain a better understanding of their company's core values and how those values play a critical role in making a difference, which make employees more likely to embrace the corporate culture. Subsequent business benefits include stronger employee loyalty and advocacy, improved productivity, and reduced turnover and absenteeism costs.

RESEARCH FINDINGS

- A company's support of employee volunteering is a key driver in directly influencing employees' feelings about their jobs, more so than cash or in-kind donations.8
- Hewitt Associates has identified six components of employees' intellectual and emotional engagement. Of these, five (people, work and value, opportunities, quality of life, total rewards) stand to benefit from a well-supported pro bonoprogram.9
- Losing an employee, especially a high performing one, can be incredibly expensive. A Cornell University study estimates that the financial impact of losing an employee can be between 50-150 percent of the annual salary of the position.10

METRICS

- Percentage of employees aware of the program
- Percentage of employees mentioning the program among top factors for staying with the company
- Perception of work/life balance of participants compared to non-participants
- Percentage of increased productivity (self-assessed and observed by line-management)
- Compared absenteeism and turnover rates of employees who are aware/participating to those who are not
- Compared cost of the program to cost of losing employees that could have been retained
- Employees' support of the program; for example, testimonials regarding their experience

CASE STUDY: GLOBAL MEDICAL TECHNOLOGY COMPANY BD

"Helping all people live healthy lives" is the mission of global medical technology company BD. "But without examples, such commitments can easily become empty words," notices the Corporate Citizenship Company.11 Facing this challenge, BD designed a loaned employee pro bono program to give employees a way to participate in pursuing the company's raison d'être. By sending employees away to improve the quality of health care services in medically underserved regions, BD brought the company's values to life. Post-project research shows employees are more likely to stay with the company and to recommend it to others. They reported "a new sense of purpose in their positions and for BD products, as well as a renewed pride in the company." BD also observed an extremely high level of awareness about the project within the company. "I have worked for other companies with strong corporate values, but I have not felt it the way you feel it at BD. This project has brought the 'passion for caring' down to a common level for BD associates in a way that very few initiatives could do," claims a BD associate.

ENHANCED RECRUITMENT

Pro bono opportunities attract and retain top talent.

Job seekers, and especially Gen Y professionals, are sensitive to corporate citizenship and are more likely to work for a corporation that allows them to donate their time and skills. And, they are more likely to recommend it to their peers. Pro bono promotes good corporate citizenship through high community impact and the effective leveraging of its employees' unique skills within those very same communities. In addition, a well-designed pro bono program open to non-employee participants can attract and engage talented, like-minded potential recruits. Leveraging these benefits during recruitment, however, requires a well-thought out communication strategy for applicants and new recruits.

RESEARCH FINDINGS

- In a competitive labor market, core variables like compensation tend to become commoditized, and differentiation often relies on more qualitative factors like people and values.13
- 81 percent of Americans take into consideration a company's commitment to a social issue when deciding where to work.14
- 62 percent of Gen Y volunteers would prefer to work for a company that provides opportunities to apply their skills to benefit nonprofits. 66 percent of respondents say their company's volunteering program was not discussed at all during their hiring process.15
- 88 percent of Fidelity Investments' volunteering program participants said their pro bono experiences make them feel more inclined to recommend their company as a great place to work.16

METRICS

- Percentage of job applicants mentioning the pro bono program during job interviews
- Percentage of pro bono projects resulting in new recruits or new recruiting leads
- Cost/performance of the program as compared to cost/performance of traditional recruitment efforts
- Percentage of new recruits aware of the program after a few weeks within the company

CASE STUDY: THE NERDERY'S OVERNIGHT WEBSITE CHALLENGE

The Nerdery's "Overnight Website Challenge" is a 24-hour Web development marathon. They engage their own employees but also proactively recruit other Web developers from the local community. These outside developers constitute close to 50 percent of total participants. The Nerdery sees this external help as a boost to their internal recruitment efforts by exposing the company's culture every year to new potential employees. They are friends, family, clients, ex-colleagues, or just willing volunteers, who get a great opportunity to build unique relationships with employees at The Nerdery.

MORE INTERCONNECTED WORKPLACE

Pro bono deepens connections and collaboration vertically and horizontally across a company.

Pro bono is proven to foster internal communication and enhance teamwork skills when projects are performed in teams. Employees can be staffed with colleagues who are not normally in their working group, which allows them to tap into broader contacts within the company. As a result of these pro bono initiatives, employees experience increased networking opportunities, leading to reports of increased collaboration across divisions and wider visibility within the company. Pro bono eventually deepens the strength of relationships laterally across business units and vertically between employees and line managers or into senior leadership. Pro bono programs can particularly support the establishment of a new corporate culture after a merger/acquisition by connecting people around common values.

RESEARCH FINDINGS

- Pro bono projects and recognition events give employees the opportunity to get to know each other in a positive way and instill a sense of pride in the company.17
- 82 percent of Fidelity Investments participants report better teamwork skills.
- Employees are more connected to each other as a result of pro bono projects. 90 percent of participants say that they met new colleagues through their Common Impact pro bonoexperience.18

METRICS

- Percentage of employees indicating an expanded network or improved visibility within the company
- Percentage of managers who observed improved teamwork as a result of pro bono service

CASE STUDY: MICROSOFT'S LOANED EXECUTIVE PROGRAM

Microsoft's unique Loaned Executive program enables employees from across all segments of the company to work in the Community Affairs department full-time for a period of four months, coordinating and running Microsoft's annual giving campaign for local charities. In 2010, the campaign raised $49 million from employees alone by engaging with Microsoft's 50,000 U.S.-based employees. With Microsoft's corporate dollar-for-dollar matching program, the company and its employees collectively raised $96 million for local charities and nonprofit organizations. Participating employees get unparalleled opportunities to meet with thousands of their fellow employees, including many senior Microsoft executives. These meetings and networking opportunities have led to enhanced cooperation among Microsoft's employees and has improved the overall flow of information across product teams.

IMPROVED BRAND AND PUBLIC RELATIONS

Pro bono increases brand visibility and public perception at a minimal cost.

Pro bono is an effective way of generating positive public relations and showcasing the company's unique expertise. While pro bono projects provide unique and compelling stories that allow corporations to speak up and benefit from free media coverage, they also leverage employees, partners, and opinion leaders as brand ambassadors. Companies running pro bono programs are able to maintain positive perceptions and achieve recognition for having an innovative and impactful community involvement strategy. Subsequent benefits include both an increase in the willingness of customers to pay premium prices and enhanced power in negotiations.

RESEARCH FINDINGS

- Corporate responsibility is a leading driver of public perception and reputation. CSR (31 percent of respondents) is second only to Products and Services (34 percent) in determining corporate reputation drivers, ahead of Business Operations (26 percent).19
- Publicity garnered from pro bono activities is less likely to be viewed as self-serving than traditional advertising.20
- 64 percent of executives say that corporate citizenship produces a tangible contribution to the bottom line. At large companies, 84 percent of executives see direct bottom-line benefits.21
- 86 percent of Americans say they are likely to switch from one brand to another that is about the same in price and quality if the other brand is associated with a social/community cause.22

METRICS

- Change in reputation rankings, recent awards and recognition garnered
- Number of press mentions and media impressions and the advertising value of this free media coverage (i.e., cost the company would have had to pay to obtain the same visibility)
- Number of press releases, blog entries, and social media posts mentioning the program
- Benchmark standing against competitors in the industry
- Percentage of customers citing the program as key to satisfaction or loyalty
- Percentage of revenue generated by top 5 customers with a philanthropic tie

CASE STUDY: UPS

UPS garnered 6.1 million media impressions following its response to the Japanese earthquake (see press release excerpt below). By dedicating its own resources and personnel, UPS built on its existing reputation as a 'global corporate citizen' and enhanced its image among its customers and employees for going above and beyond their competitors and other large corporations in response to this tragic situation.

For smaller companies, pro bono can also prove to be a crucial driver in garnering a positive reputation. In 2010, almost 20 percent of The Nerdery press mentions focused on The Overnight Web Challenge – the company's pro bono program – and 100 percent of press releases mentioned the event. As the CreateAthon pro bono marathon model spreads on a national level, the ad agency Riggs Partners has gained the reputation as the founder and trademark-owner of the concept. Recently, the small agency was contacted by the Discovery Channel to help develop its own program.

STRONGER RELATIONSHIPS AND NETWORK

Pro bono creates opportunities for relationship building and networking that strengthen customer relations and open business development opportunities.

Pro bono can broaden the company's network and help build relationships with strategic stakeholders that indirectly impact the bottom line. A company can design a pro bono program in partnership with opinion-leading community partners or peer organizations that may pave the way for further business-related collaborations. A pro bono program that also involves the company's clients and prospects as volunteers can strengthen customer relationships and generate new clients.

RESEARCH FINDINGS

- Pro bono has the potential to be a powerful model for building non-transactional relationships between a corporation and its clients, vendors, and partners. It builds value-based relationships between employees and their counterparts at other organizations, allows the company to gain insights into the challenges clients face to better meet their expectations, and enables vendors to better understand the company's needs.24
- 84 percent of Deloitte's pro bono projects resulted in significant relationship or exposure gains materially related to new business efforts. 60 percent of Deloitte participants also reported a "new level of client interaction."
- Pro bono gives companies extensive networking opportunities. For instance, at the Ad Council's Annual Public Service Award Dinner, pro bono partners are recognized for their contributions in front of 1,200 of their peers.25

METRICS

- Number of partnerships bound with other businesses or public organizations to support the program and percentage of those partnerships that have had an impact on business activity
- Number and value of leads generated and new customers
- Surveys and testimonials from internal stakeholders on key relationships

CASE STUDY: PENTAGRAM

For more than 15 years, the design firm Pentagram has supported and maintained strong relationships with strategic community partners in New York. The agency's large pro bono work portfolio includes numerous marketing materials for the Public Theater and the famous awareness campaign advocating for the transformation of the High Line from an unused railroad into an elevated green park. Speaking about the business benefits of pro bono service, Pentagram senior partner Paula Scher claims, "I can't tell you how many jobs I've gotten through [pro bono work with] the Public Theater. We're connected to virtually every cultural organization in the city. We are rewarded in recommendations; we're included in groups where we find out information about things—it's all very good business." In 2008, the agency received the Council on Service Civic Participation Pro Bono Award in front of 150 corporate, government, and nonprofit leaders, convened for the Pro Bono Summit. "Embracing a pro bono approach is good for employees, the community, and the bottom line," says Jean Case, council chair. "Pentagram Design is setting a powerful example of corporate citizenship that we hope other companies will follow."

SUSTAINED LICENSE TO OPERATE

Pro bono builds community trust in a company's brand and business decisions.

Pro bono helps a company build and maintain its license to operate, defined as a firm's public legitimacy to conduct its activities. A company that over-relies on legal permits to pursue business projects without looking for community approval can be subject to negative government decisions and public criticism or resistance. Conversely, a corporation that builds trust is then able to mitigate such risks and benefit from stakeholder advocacy in a time of controversy.

RESEARCH FINDINGS

- 90 percent of survey respondents defined social license to operate as being intangible and a non-permanent measure of ongoing community acceptance of a company's activities.27 Indeed, a social license is not a piece of paper. It is hard to earn, easy to lose, and extremely difficult to recover once lost. Besides, it implies continuous renewal since it is often granted per project and varies over time and by stakeholder group.
- Four levels of social license to operate have been identified: rejection (withholding or withdrawal), acceptance (tolerance), approval (agreement), co-ownership (support and advocacy).28
- A well-designed pro bono program directly address the three pillars of a strong social license to operate, which are inclusiveness (listening and responding to community needs), respect (considering and keeping promises), and transparency (acting with principled actions and communicating persistently).29

METRICS

- Key stakeholders, and especially the local community, government, and opinion leaders' awareness and support for the pro bono program (e.g., letters of support, testimonials regarding experiences with company, public commentary)
- Number of positive local decisions as a result of the program
- Percentage of pro bono recipients who are based in locations where the company conducts business
- Percentage of employees saying they improved their knowledge of the community needs and environment
- Compared approval rates with and without pro bono programs to similar projects, or forecasted "benefit of doubt" in crisis situations

CASE STUDY: PFIZER'S GLOBAL FELLOWSHIP INITIATIVE

The Global Fellows Initiative has enabled Pfizer to maintain its license to operate with respect to key stakeholders, including governments and opinion-leading nonprofits in locations where the company operates. Lisa Foster, Pfizer's Director of Global Philanthropy observes, "As fellow after fellow meaningfully contributed their skills and partner organizations began to see their capabilities grow due to the contribution of the Pfizer Global Health Fellow, many of our critics began to look at us with less cynicism and became direct beneficiaries of the program. We could never have predicted the value of this program at the outset or the degree to which it would put a human face on our company. We responded to a critical need in a meaningful way, and it resonated with our employees and those who influence our operating environment."30

FOSTERS A CLIMATE OF INNOVATION

Pro bono exposes employees to new environments that encourage new ways of thinking, creativity, and entrepreneurial spirit.

For most businesses, innovation is critical to their ongoing success. It is easy, however, for employees to get stuck in a rut as they face similar tasks and people every day. By giving employees the opportunity to apply their skills in a different environment for the greater good, pro bono fosters employees' creativity, productivity ,and commitment. Pro bono also inspires new ways of thinking, which are often more entrepreneurial.

RESEARCH FINDINGS

- Innovation has been described as "the application of knowledge in a novel way." Pro bono can be a catalyst for finding innovative solutions. It requires employees to apply their skills to a new environment with new people, for new clients and in a different sector, which inevitably brings fresh perspectives within the company.31
- Innovation in Silicon Valley has been partly attributed to the fact that employees in the region switch employers more often than anywhere else. This process of switching jobs frequently prevents skills and thought processes from going dormant and also forces people to constantly check their assumptions. Pro bono service is likely to have a similar effect on employees.32
- 77 percent of Fidelity Investments' pro bono participants reported improved creative thinking due to their pro bono consulting engagements.33

METRICS

- Percentage of participants reporting being more creative
- Number of process innovations and new ways of thinking that have been brought back to the company and changed the way employees are working and interacting

CASE STUDY: IBM

IBM values innovation that creates social impact while exploring new business opportunities. As a result, employees are more inclined to be creative and see pro bono engagement as a unique opportunity to "learn new ideas, methods, and perspective [they] cannot imagine at the moment," as highlighted by a Corporate Service Corps participant. This innovation model based on "shared value" seems to be widely accepted by employees who are willing to bring back their knowledge to the company. "It is scratching the surface of some previous unknown and figuring out how to apply that knowledge back at IBM that will make me, this program, and IBM successful. I plan not only to find ways to apply the things I learn to grow in my career, but also to find ways to share what I learn with my colleagues at IBM to help them grow, and hopefully, help us all serve our clients better," says a former Peace Corps volunteer.34 IBM reports they are now moving with the rapidity and creativity of a much smaller enterprise.35

NEW OR IMPROVED PRODUCTS

Pro bono gives employees the opportunity to develop and improve products with the benefit of real-time customer feedback.

Through pro bono projects, employees gain valuable customer insight and may develop new services and products to meet social needs that can then be added to the company's commercial offering and brought to a broader market. Pro bono also gives an opportunity to improve current products by taking into account volunteers' feedback and by integrating end-user innovations observed on the field.

RESEARCH FINDINGS

- Pro bono service allows employees to observe how the company's products and services are used and thus ensure continuous improvement of products. Indeed, many products and services are developed or at least refined, by users.37 Pro bono projects can help collect and bring these ideas back into the supply network.
- For companies who serve small businesses, nonprofits, or emerging consumer groups, pro bono service can provide valuable customer insight. Employees are able to roll up their sleeves and work side-by-side with strategic stakeholders, learning about the populations they service and gaining understanding into what it takes to run a small operation.38 Employees are then more likely to improve or develop products that meet market needs.

METRICS

- Number and value of new products developed and sold
- Number and market value of new patents developed

CASE STUDY: IBM

IBM's recent work in the areas of voice recognition, virtualization, data visualization, data analytics, and cloud computing have all increased their intellectual property and have been embedded in products and services. And what else do these all have in common? These were all initially conceived during pro bono community engagements. The company's work in cloud computing and open source materials have been used extensively during its disaster relief and recovery engagements, including post-earthquake zones in Chile, Japan, and China, as well as post-tsunami in Sri Lanka. Many areas of work from these community responses have been integrated into the company's commercial offerings. In Nigeria, Project Comfort focused on women's health care, in which new products were developed that have now been made mainstream for IBM clients on the commercial end. To date, over a dozen new patents have been applied as a result of the company's community engagement and pro bono work.

NEW MARKET OR ENHANCED MARKET PENETRATION

Pro bono projects allow a company to broaden its reach beyond its existing markets and customer base. For example, pro bono service can help the company reach potential customers such as nonprofits, small companies, social entrepreneurs, or low-income customers and other demographic groups, locally or internationally. Through field-based experience, employees are allowed to not only raise their cross cultural awareness, but also learn to better understand the challenges, priorities, and large unmet needs of new markets and niches to be served.

RESEARCH FINDINGS

- The old model of innovation can be ineffective when trying to serve customers from the middle and the bottom of the pyramid. David Etzwiler, former Executive Director of Medtronic Foundation, advises to "go into a community and start from scratch by asking the question, 'What's not happening here that could happen, and how do we address it?'" Pro bono service can help answer this question by leveraging the company's expertise to solve social issues.40
- Through pro bono, employees are able to roll up their sleeves and work side-by-side with nonprofit leaders and understand what it takes to run a small operation (nonprofit or for-profit) as well as learn about the populations they serve.41
- The need for greater cross-cultural awareness is heightened in our global economies. Cross-cultural differences in matters such as language, etiquette, non-verbal communication, norms, and values can, do, and will lead to cross-cultural blunders.42

METRICS

- Percentage of volunteers reporting a better understanding of their community's needs
- Number and value of new markets entered
- Amount of additional revenues generate

CASE STUDY: IBM'S COMMUNITY PROGRAMS

IBM's community programs have helped the company broaden its geographic scope by penetrating into new markets in multiple continents, serving countries as diverse as Ghana, Romania, and Indonesia. By supporting the development of small and medium enterprises across the globe, Corporate Service Corps (CSC) members contribute to growing IBM's knowledge of the socio-economic conditions and business practices in emerging markets. Employees are sent to the same countries each year, which allow for both greater social impact and consistent business insights. "Now, hundreds of IBMers from anywhere in the world can take direct action on the world's most pressing problems, experiencing the satisfaction [of their CSC project]. Service Corps members will take that learning back to their countries and translate it how they do business and how they think about the world," observes Rosabeth M. Kanter, professor at Harvard Business School. "Imagine the cumulative impact, as it ripples through and beyond IBM's 386,000 people and their work in 170 countries."4

GLAXOSMITHKLINE - THE PULSE VOLUNTEER PARTNERSHIP PROGRAM

Improving healthcare systems around the world and developing future GSK leaders in the process.

COMPANY OVERVIEW

GlaxoSmithKline (GSK), a global pharmaceutical, vaccines, and consumer healthcare company headquartered in London, United Kingdom, has a rich history that dates back to the early eighteenth century and today employs over 90,000 people in 114 countries. It has a portfolio of products for major diseases and has a large consumer healthcare division that produces and markets oral healthcare products, nutritional drinks, and over-the-counter medicines.

GSK is known for investing in community partnership programs that seek to improve access to medicine and healthcare. In the developing world, the company provides certain medicines at preferential prices, ensuring the poorest can still benefit from its vaccines and health products. GSK's vaccines have been included in immunization campaigns in 182 countries worldwide, and 1.4 billion vaccine doses were delivered to 179 countries in 2010. GSK believes that business has an important role to play in society and strives to leverage its resources in a way that delivers shared value to communities around the world and business.

"We work as a partner with under-served communities in the developed and developing world supporting programs that are innovative, sustainable and bring real benefit to these communities. We encourage our employees to become involved with deserving causes in their local communities around the globe. We support their time and dedication with various internal programs and opportunities to encourage active employee involvement."

— GLAXOSMITHKLINE WEB SITE

PROGRAM OVERVIEW

GlaxoSmithKline's mission of helping people to do more, feel better and live longer is achieved not just through medicines, vaccines, and consumer products, but also through employee involvement. In 2009, GSK developed the PULSE Volunteer Partnership, a two-year-old leadership development and service program. Since 2009, more than 200 high-performing employees have been sent around the world to volunteer their professional skills and expertise to nonprofit organizations, building solutions and improvements across sectors in healthcare, education and the environment. Employees are given an opportunity to use their professional skills and knowledge during a three- or six-month immersion experience within a non-profit or non-governmental organization (PULSE Partner).

So far PULSE has successfully placed 201 volunteers in 39 different countries with 56 NGOs (PULSE Partners). From the Canada to Bolivia, Kenya to China, Haiti to India, PULSE has a global focus contributing to nonprofits and NGOs worldwide. In addition to empowering employees to make a significant impact on communities in need, the immersion assignments support the employees' professional development though leadership growth and skill development.

"A Pulse Volunteer from Pharmaceuticals, UK worked with a non-profit in Sri Lanka for six months to develop a 5-year strategic plan for three of the non-profit's disability resource centers that provides community-based care for people with disabilities in areas hit by the Tsunami in 2004."

— PULSE Impact summary

BUSINESS BENEFITS

HUMAN RESOURCES BENEFITS

GlaxoSmithKline's employment practices are designed to help the company create the right workplace culture in which all GSK employees feel valued, respected, empowered, and inspired. The PULSE program plays an important role in providing employees an opportunity to enhance their leadership and development skills. They are inspired and motivated to bring back what they learn in the field and apply these learnings to the business challenges they face in their jobs back at GSK.

FOSTERING INNOVATIVE TRAINING SERVICES

The program is designed to develop three unique skills: flexible thinking, building relationships and enabling/driving change, which GlaxoSmithKline views as three of the six core competencies critical for its future leaders. Prior to departure, the selected PULSE Volunteers and their line managers receive training and set specific, measurable development and service goals in conjunction with their nonprofit supervising managers.

In addition, because there is no back-fill for the employees who leave GSK for a three- or six-month full-time engagement, the PULSE Volunteer Partnership offers a development opportunity for the home team, which must step up and cover the role and responsibilities of the PULSE Volunteer. In this way, PULSE offers a development opportunity for a greater number of employees than just the 50 to 100 Volunteers who go out on a PULSE assignment each year. As one PULSE Volunteer said of her home team's learning experience while she was out of the business for six months, "It was nice for my team not to have the 'big boss' around for a while. They surprised themselves with what they could do and what they could handle on their own."

INCREASING EMPLOYEE MOTIVATION

GlaxoSmithKline maintains employee motivation for both the PULSE Volunteers and their Home Teams throughout the program by encouraging regular communications between the Volunteer and his/her home team. In this way, line managers and home teams are brought along the development journey of their PULSE Volunteer – and also, hearing about the good work and service that the Volunteer is doing for people and communities in need helps to keep them motivated to cover that Volunteer's workload for the duration of the assignment. During the PULSE Volunteer's re-entry process, employees are also expected to present their experiences to their co-workers by discussing not only the impact the Volunteer had on the nonprofit partner, but also the impact the experience had on them personally and professionally, as well as the impact and change that they hope to bring back to GSK.

BROADER VISIBILITY WITHIN GSK

The PULSE program sits within the Center of Excellence for Global Talent, Leadership and Organizational Development, which is housed with GlaxoSmithKline's Human Resources department. It is very clear what the PULSE program offers externally, but GSK also wanted the program's internal benefits to be clear to line managers and senior leadership. Therefore, they have housed PULSE within the HR department, demonstrating that the program raises the bar for talent development for future leaders within the company – a clear form of ROI for all. This is considered to be a powerful way to train future global leaders; to improve employee morale, motivation, and retention; and to recruit the next generation of talent – all while doing some good for communities and societies around the world.

IBM - CORPORATE SERVICE CORPS & TRAILBLAZER GRANTS

Big Blue's giant commitment to sustained corporate philanthropy and innovation that matters, for the company and for the world.

COMPANY OVERVIEW

International Business Machines (IBM) is a multinational technology and consulting firm headquartered in Armonk, New York. IBM manufactures and sells computer hardware and software, and it offers infrastructure, hosting, and consulting services in areas ranging from mainframe computers to nanotechnology. The company was founded in 1911 and, in 1924, adopted the name International Business Machines. Today IBM employs more than 425,000 employees, often referred to as "IBMers," in over 200 countries with occupations including scientists, engineers, consultants, and sales professionals.

IBM's distinctive culture and product branding has given it the nickname "Big Blue." In 2010, Interbrand ranked IBM as one of the world's most valuable brands, second only to Coca Cola. Additionally, Ceres and Covalence, two prestigious independent Corporate Social Responsibility (CSR) rating organizations, ranked IBM No. 1 for its work around corporate philanthropy and citizenship.

> "The IBM volunteers will learn an enormous amount about how business is done in these countries and the cultural aspects, they also will learn a lot about themselves and how to challenge themselves."
>
> — Michael Levett
>
> President, Citizens Development Corps, IBM

PROGRAM OVERVIEW

In celebration of its centennial, IBM has deemed 2011 the Celebration of Service, honoring their employees commitment to volunteer service. Through the exemplary **On Demand Community (ODC)** program launched in 2003, more than 170,000 employees and retirees have access to a large volume of volunteer resources and opportunities and have logged more than 11.9 million hours of volunteer service. Recently, IBM launched two pro bono programs as part of the company's community involvement strategy.

In 2008, IBM launched the **Corporate Service Corps (CSC)** to help IBMers enhance the skills needed to lead in a globally integrated enterprise while also allowing them to deliver expertise-based services to communities and nonprofits in emerging markets. Teams of IBMers are sent to emerging markets for one month community-based assignments, where they perform community-driven economic development projects that bring together business, technology, and society. CSC is a leadership and skills development program that helps increase participants' cultural awareness and understanding of growth markets while further instilling a sense of social responsibility. Over the last three years more than 1,200 employees and executives from over 50 countries participated in the program. They have served on over 110 team assignments in more than 25 countries across Africa, Asia, Latin America, and the former Soviet Republics. With each team's efforts valued at $250,000, more than $25 million in support has been provided through CSC assignments to date. In fact, the CSC model has proven so successful that other companies including Dow, Federal Express, and PepsiCo have adopted similar models.

IBM also provides significant support to nonprofits through its Trailblazer Grants. Introduced in 2010, these grants mirror the type of assistance IBM provides to its business clients by allowing local nonprofits to tap into IBM's innovative technology and deep expertise of its employees. Through consulting and technology tools in areas such as project management, strategic planning, social networking, leadership and collaboration, and operational risk assessments, IBM's Trailblazer Grants offer customized assistance to nonprofits that help them reach deeper into their communities, more effectively connect with populations in need, and enable the nonprofits to more efficiently and effectively manage their own organizations. In its pilot phase, the Trailblazer grants were distributed to 30 nonprofit organizations and schools across the U.S. In 2010, 150 groups around the world received grants, and 165 groups are expected to be Trailblazer grant recipients in 2011.

"Now, many hundreds of IBMers from anywhere in the world can take direct action on the world's most pressing problems, experiencing the satisfaction [of their CSC project]. Service Corps members will take that learning back to their countries and translate it into how they do business and how they think about the world."

— Rosabeth Moss Kanter

Professor, Harvard Business School
and Strategist and Author

BUSINESS BENEFITS

NEW AND IMPROVED PRODUCTS

Innovation is at the heart of what IBM does. IBM commits $6 billion each year for research in over 100 research labs around the world and holds more patents than any other U.S.-based technology company. IBM's recent work in the areas of voice recognition, virtualization, data visualization, data analytics, and cloud computing have all increased IBM's intellectual property and have been embedded in products and services. And what else do these all have in common? These were all initially conceived during pro bono community engagements.

The company's work in cloud computing and open source materials have been used extensively during its disaster relief and recovery engagements, including post-earthquake zones in Chile, Japan, and China, as well as post-tsunami in Sri Lanka. Many areas of work from these community responses have been integrated into the company's commercial offerings. Another example is from Nigeria-based CSC team engagements called Project Hope and Project Comfort that focused on women's health care, in which new products were developed that have now been made mainstream for IBM clients on the commercial end.

NEW AND ENHANCED MARKET PENETRATION

To date, over a dozen new patents have been granted as a result of the company's community engagement and pro bono work. IBM's community programs have helped the company broaden its geographic scope by penetrating into new markets in Africa (especially Nigeria, Ghana, Kenya, and Tanzania), Eastern Europe (especially Romania), and countries in Asia including Cambodia, Vietnam, and Indonesia.

ADDITIONAL INVESTORS

IBM's community engagement programs have also impacted the company's social investment ratings. Over the last several years, IBM's No. 1 rating on both Ceres and Covalence has resulted in "buy" recommendations from many additional socially responsible investors, who have increased in their IBM holdings. The company's community involvement is not the only factor that has improved its social investment ratings but is certainly an important component of that ratings outcome.

"The IBM technology enabled us to implement our program in 68 countries around the world in only seven months. We're getting valuable visibility from On Demand Community that we can reference with our clients. It demonstrates our company's values, the skills of our people, and the power of our technology, all in a way that is easy for our clients to relate to their own businesses."

— Diane Melley

Corporate Citizenship Director, IBM

DELOITTE'S PRO BONO PROGRAM

Deloitte's formal pro bono program delivers high value services to the nonprofit sector while also offering high value business benefits back to the company

COMPANY OVERVIEW

Deloitte & Touche USA LLP (Deloitte)44 is one of the leading professional services organizations in the U.S., providing audit, tax, financial advisory, and consulting services and employing nearly 50,000 people.

- Deloitte's personnel leverage their skills to benefit the community in several ways:
- Deloitte's overarching community involvement strategy is focused on using its innovative thinking to help people and communities thrive.
- Employees can be assigned to pro bono engagements, which are staffed and managed in the same way as commercial engagements.
- Personnel are encouraged to serve on non-profit boards; to date approximately 2,000 non-profit board seats are held by Deloitte personnel.

PROGRAM OVERVIEW

Deloitte has done pro bono work for decades, but prior to 2008, it was not tracked as part of a formal organization-wide program, nor was it linked to a formal organizational goal. In February 2008, when the Corporation for National and Community Service announced "Billion + Change," a federal initiative to encourage American businesses to champion pro bono work, Deloitte responded with a pledge to deliver $50 million in pro bono services by 2011.

One initial challenge in developing the formal pro bono program was to get all the company's business units (tax, audit, financial advisory, and consulting) to buy in to the idea that contributing pro bono service is not only good for the community, but also good for employees and business. Prior to its launch, dozens of meetings were held with stakeholders at every level to gain insight on how the program could and should be structured, and to generate consensus on key decisions.

"The Citizens Committee of New York City, which mobilizes community resources to improve local quality of life, fields hundreds of project proposals a year. Deloitte helped the organization's leadership build a dynamic dashboard using metrics and scoring criteria to inform the organization's decision-making process so that resources are allocated most effectively."

— Community – It's our business: Insights and reflections on doing pro bono work
Deloitte LLP, 2011

PROGRAM DETAILS

In June 2011, Deloitte had delivered nearly 300 projects since the program launched and met its $50 million goal. Each of Deloitte's business units commits a percentage of their budget to create an annual pro bono fund. The funds are allocated across six pro bono committees (one national, five regional) responsible for managing the investment at the national and regional levels. The program leverages Deloitte's existing client service model and provides supplemental tools to guide strategic project selection.

To be eligible for pro bono support, nonprofits must have an existing relationship with Deloitte through financial support; volunteerism; Deloitte personnel serving on its Board of Directors or Trustees; or a partner, principal or director (PPD) sponsor (advocate for the duration of the engagement). Project applications must be submitted by Deloitte personnel and are vetted by the pro bono committees. The committees assess applications based on key criteria that take into account potential social impact as well as business value.

"As well as building a healthy business environment in the long term, the benefits can be more immediate. It helps communicate what a company stands for; it helps attract, develop and retain talent; and it helps us showcase our values and talents in the marketplace."

— Barry Salzberg

CEO, Deloitte LLP

BUSINESS BENEFITS

Deloitte appreciates the connection between achieving social and business outcomes. The business value opportunity of a pro bono application is estimated upfront. Both during the engagement and afterward, business benefits are measured through online surveys that are administered to three different stakeholders: project managers, the Deloitte professionals staffed on the engagements and the pro bono clients.

> "Skills-based volunteerism is transforming community involvement in corporate America and opening the door to the idea that corporate community outreach is not just an important driver of social change, but an innovative and effective business strategy."
>
> — Evan Hochberg
>
> National Director of Community Involvement, Deloitte Services LP

FOSTERING INNOVATIVE PROFESSIONAL DEVELOPMENT

The program provides valuable professional development and networking opportunities for personnel. For many Deloitte professionals, pro bono provides a unique opportunity to demonstrate interpersonal, leadership, teamwork and business skills. The program assists in ongoing recruitment and retention efforts. 70 percent of participants stated that pro bono is a core component of their job satisfaction, which directly relates to employee loyalty. The program is also a central part of Deloitte's recruiting efforts and has been included in recruitment flyers, student leadership conferences, on-campus presentations, and other similar materials and events.

- 72 percent of Deloitte professionals who worked on pro bono projects gained new skills or experience; key areas of skill development included client interaction, communication, project management, and problem solving.45

STRENGTHENING RELATIONSHIPS AND NETWORK

Pro bono work enables Deloitte to showcase both its values and capabilities to senior business executives, who serve on the boards of the nonprofits Deloitte is supporting. Pro bono work also provides the personnel doing the work with a unique opportunity to build stronger client relationships. According to an employee survey:

- 84% of pro bono projects resulted in significant relationship or exposure gains materially related to new business efforts.46

ENHANCED BRAND AND PUBLIC RELATIONS

Deloitte is well known for taking a leadership position on the issue of contributing pro bono, and its program demonstrates both the organization's core competencies and its commitment to corporate citizenship. The pro bono program supports the organization's brand promise and enhances its reputation for being socially responsible. Examples of this effort include its Making A Difference…Differently documentary series, its publication of Community – it's our business: Insights and reflections on doing pro bono work, and the many recognitions it has received including those from The White House, Points of Light Foundation, and U.S. Chamber of Commerce. These efforts and others have contributed significantly to building Deloitte's reputation as a leading corporate citizen and leader in the pro bono movement.

> "When presenting their pro bono work in front of nonprofit boards, which are often comprised of leaders of other companies, our teams are able to impress with their expertise and sometimes get hired for paid engagements."
>
> — Meredith Fontecchio
>
> National Community Involvement Manager, Deloitte LLP

THE NERDERY OVERNIGHT WEBSITE CHALLENGE

Web developers frequently stay up all night – but when they do so in the service of nonprofits, all sort of interesting impact happens.

COMPANY OVERVIEW

In 2003, three Web developers founded the Sierra Bravo Corporation, later renamed to The Nerdery. With growing demand for online solutions, the company grew quickly, expanding to $16.8 million in revenues and almost 200 employees in two locations by 2010. Beginning in 2007, the company expanded beyond its initial core group of clients to partner with advertising agencies to develop their clients' interactive projects, including Web sites, social media, and mobile apps.

The expanding ranks of "Nerds" employed by The Nerdery has allowed the company to prioritize recruitment and cultivation of its culture. In 2008, the company launched a dedicated Web site to attract Web developers. Simultaneously, the company increased resources to implement and promote the Nerdery Overnight Website Challenge (The Challenge). With its rapid success and the realization of The Challenge, The Nerdery has been featured frequently in the local Minneapolis press and is well-known in the community. Beginning in 2008, the company also appeared in national magazine rankings, such as the Inc. 5000 and Business Journal Fast 50 lists of fastest growing companies.

PROGRAM OVERVIEW

In 2008, Nerdery Vice President of Marketing Mark Hulburt drew upon on his previous experience in the nonprofit sector and proposed that The Nerdery engage in a pro bono program. So, with full backing from management, The Nerdery launched its first annual pro bono marathon in 2008. The inaugural Challenge brought together 88 volunteers drawn from company employees and other local Web developers. They formed 11 teams and built Web sites for 11 local nonprofits, resulting in a huge success. The Challenge has grown into an annual event, and by 2011, there were 175 volunteer developers, 45 from The Nerdery, who created Web sites for 18 nonprofits.

Organizing such an event is no easy feat as it takes the four-person marketing team approximately four months to prepare for The Challenge. Even Nerdery employees who are not developers get involved by helping organize and promote the event. On the whole, 75 percent of the employees committed themselves to The Challenge in 2011. In order to participate, Web developers (employee or not) must apply in teams of nine to 10 with a designated captain. Selected nonprofits and teams get to know each other through a speed dating event and are finally paired by judges based on each team's unique skill set and the non-profit's needs. Teams, however, do not know their selected nonprofit until "D-Day."

Over the course of the 24-hour marathon, the teams relentlessly strategize, delegate, plan, write code, revise, and finalize their deliverables, all the while fueled by donated food and coffee. At the end of the 24 hour period, four teams are selected by the judges to briefly present their work. A final winning team is awarded top honors and the rights to brag of their achievement until next year's Challenge.

The Nerdery encourages ongoing support for the nonprofits so that they may experience a successful launch and marketing effort for their new Web site. Teams may offer services such as:

Education in design and web applications, business analysis, or project management

Free Web hosting

Digital communications advice

"We're challenging other designers and programmers to join us in donating a little time to help some worthy Minnesota non-profits build websites that work better and smarter for their causes. "

—LUKE BUCKLIN

President, The Nerdery

BUSINESS BENEFITS

INCREASING EMPLOYEE MOTIVATION

One of The Nerdery's main goals is to cultivate a workplace where talented Web developers can feel good about their work and where they are allowed to blend work and fun. The nonprofits assisted by The Nerdery are local organizations that directly help people in the very communities where the employees live and work.

Since the marathon suits the way developers do their paid work, which is in the middle of the night and on a tight deadline, The Challenge inspires a culture of "giving back" that supports the business too. And, perhaps above all, The Challenge is a contest, and the winner is bestowed with valid bragging rights – a challenge Web developers cherish.

> "This mentality has helped us to spread leadership and responsibility across the organization, exercising the strengths and passions of the individuals that are best equipped to serve the needs of the company. This mentality also spurred us to create the Web Challenge."
>
> —Luke Bucklin
>
> President, The Nerdery

SUPPORTING RECRUITMENT AND TRAINING

By attracting so many non-employee Web developers – close to 50 percent of total participants – The Challenge is a great way to boost to the company's recruitment efforts. Non-employee participants are friends, family members, clients, ex-colleagues, or just willing volunteers, who get a great opportunity to build unique relationships with The Nerdery's employees in an intense 24-hour period.

Although the data is not tracked, the company affirms that a significant number of recruits have been introduced during these Challenges. Additionally, when job applicants are asked how they discovered The Nerdery, numerous applicants mention The Challenge, and a paragraph on The Challenge is included in all recruiting materials.

The Challenge also helps to develop soft skills. Team development is very organic in that people self-select into certain roles, offering opportunities for some participants to step up and lead teams even though they are more junior or in a role that usually doesn't hold a management position.

ENHANCING PUBLIC RELATIONS AND NETWORK

The Challenge is a powerful way to promote The Nerdery's corporate culture externally. In 2010, nearly 20 percent of press writing about the Nerdery focused on The Challenge, and 100 percent of the Nerdery's press releases mentioned the event. Blog entries, Tweets, and Facebook postings also often refer to The Challenge.

The Challenge also highlights the company's corporate strategic goals to be considered by business partners as a creative enterprise, one that can do more with fewer resources. Since teams often have clients as team members, The Challenge can strengthen client relationships and/or generate additional leads.

The Nerdery has also won accolades from the local business community. Numerous local businesses partnered with The Nerdery to provide additional resources to the event, creating new relationships between The Nerdery, local businesses, and the nonprofits. From coffee and food to office supplies to their own employees' time, local businesses played a key role in the success of the event.

The Nerdery's advice: consider involving your clients, suppliers or potential recruits in your programs.

> "Whatever clients want their website to do, we make it work — but this spikes demand for our web development services. With over a hundred programmers on staff, we're as well-stocked as they come – yet we constantly need more tech talent. We wanted to build our Nerdery brand around what agencies see in us – an unstumpable web partner, ready to manage complex interactive projects on time and on budget."
>
> — Mark Hurlburt
>
> Vice President of Marketing, The Nerdery

UPS HUMANITARIAN RELIEF EFFORTS

UPS delivers humanitarian relief globally, while bringing positive results right back to the company.

COMPANY OVERVIEW

UPS is the global leader in logistics, offering a broad range of solutions including the transportation of packages and freight. Founded in 1907 as a private messenger and delivery service in Seattle, WA, UPS today delivers packages each business day for 8.5 million customers and delivers an average of 15.6 million pieces per day worldwide, or a total of 3.94 billion packages in 2010.

Its expertise in delivery and logistics has drawn UPS toward taking the initiative in major disaster relief efforts, such as the earthquakes in Japan and Haiti and the tsunami in Southeast Asia. In collaboration with The UPS Foundation, UPS has dedicated its resources (both financial and in-kind) and its employees to institute disaster-relief programs, among many other UPS philanthropic programs, that directly benefit disaster relief efforts and nonprofits that focus on disaster relief, such as The American Red Cross and CARE.

"Following Friday's 8.9 magnitude earthquake in Japan, The UPS Foundation has pledged $1 million in relief for earthquake victims there. The funds will be used for in-kind transportation of emergency supplies, trained humanitarian logistics personnel, and financial support. UPS is coordinating with its existing relief agency partners, including the Red Cross and the Salvation Army, to determine their needs."

— UPS Press Release

March 14, 2011

PROGRAM OVERVIEW

In partnership with other global logistics providers, Agility, Maersk, and TNT, UPS works with The World Food Program to provide much needed assistance in times of disaster. These logistics competitors have formed a unique collaboration, creating Logistics Emergency Teams (LETs) that consist of teams of skilled employee volunteers, who plan and respond when disaster strikes, as in the case of the earthquakes in Haiti or Japan. The UPS Foundation also contributes additional funding for the transportation (in-kind distribution) and goods needed for relief efforts with some of the world's leading relief organizations, such as UNICEF, CARE and the American Red Cross.

In addition, UPS leverages its engineering talent and logistics expertise to help nonprofits to design better global supply chains that can more efficiently respond to natural disasters. Currently, UPS has dedicated two full-time senior logistics engineers (one in the U.S. and one in Europe) who work with the American Red Cross, CARE, and UNICEF on a pro bono basis to improve their logistics capabilities. UPS has also contributed in-kind resources and financial grants as-needed to continue to support these initiatives.

"In its review of CARE operations, UPS found that the organization lacked visibility of where its supplies are located worldwide. In response, UPS has helped CARE implement an efficient and low cost tracking software system...

It's something that you would think would be normal but it's not available right now. Not very many nongovernmental organizations have that.

We believe we have a tremendous amount of intellectual capital that can be put to use. We want to be a driving force to help motivate companies and other foundations to look beyond what you've always been doing."

— Dale Herzog

Solutions Manager, UPS

BUSINESS BENEFITS

IMPROVING PUBLIC RELATIONS

The press release below was picked up by 31 outlets, resulting in 6.1 million impressions on online sites, according to a follow-on third party report. While other companies pledged financial support to the relief of the earthquake in Japan, UPS was unique in its pro bono approach by dedicating its own resources and personnel there by promoting its global logistics capabilities. By responding quickly and generating wide-spread publicity, UPS was thus able to build on its existing reputation as a global corporate citizen and enhance its image among its customers and employees for going above and beyond what other companies were able to do.

> "The LATs [Logistics Actions Teams] program with the American Red Cross in the U.S. is another component in UPS's continued commitment to leveraging its people, logistics expertise and global network to provide urgent humanitarian relief all around the world."
>
> — Myron Gray
>
> Senior Vice President of U.S. Operations, UPS

INCREASING EMPLOYEE SATISFACTION AND ENHANCED RECRUITMENT

UPS actively showcases its various employer-of-choice awards on the UPS career Web site, including as one of the Top 10 Most Socially Responsible Companies. UPS' commitment to sponsoring disaster relief efforts fits within that vein of Corporate Social Responsibility that UPS tries to promote to future recruits and existing employees.

UPS' decision to pursue humanitarian relief efforts as a philanthropic initiative also demonstrates the company's desire to have the greatest impact for its volunteers' time and money. According to a 2008 internal UPS survey, employees picked "I do what I feel will have the most impact" more frequently (36 percent of the time) than any other motivation for participating in volunteer opportunities. In promoting disaster relief as a key volunteer activity, UPS contributes to building a corporate culture that is consistent with employee ideals by allowing employees to do the most good with the skills they already have (i.e., logistics, delivery).

COMMON PRO BONO MODELS

SUMMARY, EXTENDED OVERVIEWS, & CASE STUDIES

MODEL	DESCRIPTION	CASE STUDY
LOANED EMPLOYEE	An employee is granted a sanctioned and compensated leave of absence to pursue a pro bono project. Document p.54	Pfizer, Inc
FUNCTIONAL COACHING & MENTORING	Employees match up with their nonprofit peers, form a relationship, and share functional expertise. Document p.55	Gap Inc
MARATHON	A company pools human capital resources on a pro bono project within a short, predetermined timeframe (usually 24 hours) to deliver a mass volume of deliverables. Document p.56	Createathon
STANDARDIZED TEAM PROJECTS	Individuals are placed on teams, each with specific roles and responsibilities. Each project is scoped and structured around a standard deliverable based on the needs of the nonprofit partners. Document p.57	Capital One
OPEN-ENDED OUTSOURCING	A company makes its services available to a specific number of nonprofit organizations on an ongoing, as needed basis. Document p.58	Cornerstone OnDemand
SECTOR-WIDE SOLUTIONS	A company creates a deliverable pro bono that can be applicable to all nonprofits across the sector. Document p.59	Salesforce.com Foundation
GENERAL CONTRACTING	An entity coordinates and oversees internal and external resources, promoting cross-sector collaboration to address a specific social problem. Document p.60	Civic Consulting Alliance
SIGNATURE ISSUE	The combination of formal pro bono work with additional corporate assets for the purpose of leveraging significant internal resources against a specific social issue. Document p.61	Deloitte LLP

LOANED EMPLOYEE

An employee is granted a sanctioned and compensated leave of absence to pursue a pro bono project.

Companies lend their talent on a full-time basis to strategic nonprofit partners in a loaned employee pro bono model. While relatively high cost compared to other models, loaned employees can deliver a wide range of needs with high impact while working on the ground with nonprofit partners. Loaned employee programs are also known for creating unique opportunities for talent development and enhancing the company's reputation.

OPTIMAL CLIENT OR IMPACT AREA

The loaned employee program is a great fit if you want to work strategically with a select number of nonprofit partners. You might already work with certain nonprofits or municipal partners and are looking for ways to strengthen those relationships. Alternatively, you might create a way of choosing select nonprofits that you will work with to deliver the whole spectrum of your organizational assets.

IMPACT ON CLIENT

The impact of a loaned employee program varies considerably depending on the placement and fit of the loaned employee; impact can vary from developing a program strategy to providing executive oversight to providing outreach support. In order to optimize impact, participants must be carefully vetted, and the scope of the pro bono work must be self-sustaining or sustainable within the hosting organization.

PROVIDER COST

At one employee per output, this program has a relatively high cost with low scalability.

TOP COMPANY GOALS MET

Human Capital: This program is a powerful leadership platform, training tool, and innovation driver.

Reputation: Depending on the quality and visibility of fellowship placements and relationships created, this model can be a powerful reputation driver.

CASE STUDY: PFIZER INC. GLOBAL HEALTH FELLOWS

There are more than four million health workers needed in the developing world and is a critical demand for medical expertise. Pfizer responded directly to this issue in 2002 by creating the Global Health Fellows program, a three- to six-month program that allows Pfizer employees to deliver their skills on a full-time basis to under-served communities both in developing countries and the United States. By deploying the best and brightest among its ranks, Pfizer has helped increase access to critical medical services on a pro bono basis.

By loaning professionals like scientists, financial analysts, human resources specialists, and lab technicians to organizations such as USAID and Family Health International, Pfizer helps improve health outcomes worldwide. As the company continues to grow into emerging markets, not only does Global Health Fellows inform Pfizer's business strategy, it drives the culture of the company toward innovation, develops leaders within the company, and strengthens its reputation in the global community.

FUNCTIONAL COACHING & MENTORING

Employees match up with their nonprofit peers, form a relationship, and share functional expertise.

Functional coaching and mentoring builds the leadership capacity and expertise of nonprofit leaders, while providing powerful professional development opportunities for employees at the same time. The model can be delivered in a number of ways with varying degrees of infrastructure support and cost.

OPTIMAL CLIENT OR IMPACT AREA

Functional coaching and mentoring provides an opportunity to deepen relationships with strategic nonprofit partners. These might be nonprofits partners you already work with, or you might create a way of choosing select nonprofits that you will work with to deliver the whole spectrum of your organizational expertise.

IMPACT ON CLIENT

While the degree of impact depends on the strength of the mentor pool and the infrastructure supporting the program, strong partnerships have resulted in increased leadership capacity and more sophisticated functional expertise in the nonprofit partner organization.

PROVIDER COST

This model can be executed with varying costs depending on the extent and scope, or ongoing nature of the program and the amount of infrastructure support the company is willing to provide.

TOP COMPANY GOALS MET

Human Capital: Partnerships created in this program offer powerful development opportunities for Gap Inc. employees.

CASE STUDY: GAP INC. LEADERSHIP INITIATIVE

The question of building capacity in the nonprofit sector often goes back to a question of people: how do you build leaders and develop talent? Gap Inc. has the answer. The Gap Inc. Leadership Initiative (GILI) offers Gap Inc.'s youth-serving partners the same level of intensive leadership training that it offers its own executives. The company's Human Resources team, in partnership with CompassPoint, tailored these programs for this specific audience of social change makers.

The two-year program launched in September 2009, with a two-day kick-off summit in which leaders participated in intensive learning workshops focused on strengths-based leadership, visionary leadership, change management, and adaptive leadership. Since then, these nonprofit leaders have been working in smaller groups, revisiting these content areas, and expanding upon them. Gap Inc.'s human resources professionals lead these small groups of peers through topic areas, offering coaching and mentoring support.

What sets GILI apart from other leadership development programs is the indispensable role that employees hold in the design, development, and delivery of the program. Moreover, the continuous nature of the relationships built between Gap Inc. leaders and the nonprofit program participants allows for a constant exchange of information and ideas in the context of a formal program. Both the nonprofit leaders and Gap Inc. employees are experiencing professional development through these exchanges. To date, third-party evaluation has found these coaching groups to be the most successful program ingredient in achieving GILI's program goals.

MARATHON

A company pools human capital resources on a pro bono project within a short, predetermined timeframe (usually 24 hours) to deliver a mass volume of deliverables.

The marathon model delivers pro bono to a wide range of nonprofit partners at minimal cost through a highly visible, one-day event. The marathon provides an opportunity for employees to deepen their connection to the company and each other and build teamwork skills through concentrated work on a pro bono project that is meeting a critical nonprofit need.

OPTIMAL CLIENT OR IMPACT AREA

The marathon model allows you to optimize the impact and reach of your pro bono program by serving a larger, general pool of nonprofit partners. These nonprofits might operate within your local community or within broad issues areas that are important to your company.

IMPACT ON CLIENT

The impact of this model can be hit-or-miss due to the extreme concentration of the creative work into a twenty-four hour period and the single and limited opportunity to proof work. Impact can be optimized by carefully matching nonprofit participants and volunteer skills, thoroughly scoping selected projects, and choosing clients with a more urgent need for communications and marketing collateral.

PROVIDER COST

This model can be executed at a very low cost as it has firm time constraints and pulls from existing human capital resources.

TOP COMPANY GOALS MET

Human Capital: This is a fun team-building opportunity that can be a powerful recruitment tool.

Reputation: An annual, highly concentrated work period can garner much visibility.

CASE STUDY: CREATEATHON

Like many other marketing and advertising firms, Riggs Partners had no shortage of requests for pro bono services. They found this work was not only difficult to schedule and challenging to scope, but also susceptible to derailment by pressing deadlines from paying clients. By capitalizing on a skill that communications firms are all too familiar with—pulling the all-niter—Riggs Partners created a fun and culturally appropriate model for rapidly delivering a mass volume of pro bono services. That model is CreateAthon, a 24-hour creative blitz, during which professionals in advertising, marketing, and communications firms develop pro bono marketing materials for nonprofit organizations.

Riggs Partners evolved the idea from a single agency endeavor into a National CreateAthon Network of advertising, marketing, and communications firms. By working solely on nonprofit work during a dedicated 24-hour period, CreateAthon partner agencies can give nonprofit organizations the undivided attention they deserve, delivering marketing projects ranging from brochures and Web sites to multimedia campaigns. At the same time, participating agencies garner significant recognition for their efforts and take advantage of the team-building opportunities CreateAthon offers.

STANDARDIZED TEAM PROJECTS

Individuals are placed on teams, each with specific roles and responsibilities. Each project is scoped and structured around a standard deliverable based on the needs of the nonprofit partners.

The standardized team project is a highly scalable model that allows you to deliver high-impact solutions to a wide range of nonprofits. In this model, teams of employees are brought together based on their skills and experience to deliver a project for a nonprofit partner that falls within their area of expertise.

OPTIMAL CLIENT OR IMPACT AREA

The standardized team project model allows you to deliver solutions that meet shared needs across the nonprofit sector and have a wide, scalable impact. The model requires a thorough understanding of nonprofits needs and a commitment to adapting the specific pro bono offering to those needs, while keeping the service issue agnostic.

IMPACT ON CLIENT

Potentially high value and impact for products or services that are uniform across the sector.

PROVIDER COST

This model requires moderate initial investment and careful implementation oversight. Once a program is established, however, the model can be sustained or scaled efficiently using standardized tools and processes.

TOP COMPANY GOALS MET

Reputation: By making a critical resource available to the larger nonprofit community the company can gain significant recognition.

CASE STUDY: CAPITAL ONE PRO BONO CORPS

Capital One's renowned pro bono program began in 1998 with the company's brand marketing team. The team had been receiving a number of requests for pro bono work from community organizations and decided to formalize a program to address the nonprofits' needs and engage with them on an ongoing basis, creating what would eventually be called the Brand Corps.

Over the years, other departments at Capital One, including information technology, finance, legal, and human resources, have joined Brand Corps in building capacity for the company's nonprofit partners. Each Corps has created its own Pro Bono Catalog, detailing their broad range of project offerings and the associated skills necessary to complete the project. In addition, the company holds frequent roundtables, about every 6 weeks, to vet potential pro bono clients for alignment with corporate philanthropic priorities. Across disciplines, the team-based approach increases each project's likelihood of success and creates powerful professional development opportunities, while Capital One's robust online platform makes the program highly scalable.

OPEN-ENDED OUTSOURCING

A company makes its services available to a specific number of nonprofit organizations on an ongoing, as needed basis.

Open-ended outsourcing is a great way to leverage existing service delivery models in the delivery of pro bono. The model makes services available to nonprofit partners that they would never otherwise have been able to afford, while exposing employees to new and diverse clients and their unique needs.

OPTIMAL CLIENT OR IMPACT AREA

Strategic nonprofit partners are the best place to start with an open-ended outsourcing program. These might be nonprofit partners you already work with, or you might create a way of choosing a select few to provide your services. Depending on the size of your company or firm, the program can be scaled to serve general nonprofit partners and perhaps the nonprofit sector as a whole.

IMPACT ON CLIENT

This model is a great way to help smaller nonprofits who are unable to afford in-house, function-specific expertise on an ongoing basis.

PROVIDER COST

This model can be executed at a very low marginal cost as long as the service being outsourced already exists within the standard business model.

TOP COMPANY GOALS MET

Reputation: By offering outsourced services to a nonprofit audience, a company can gain a significant reputation boost.

Human Capital: Outsourcing exposes employees to a new and diverse pool of clients.

CASE STUDY: CORNERSTONE ONDEMAND

The nonprofit sector's struggles with attracting and retaining the right people are well known, but while solutions are starting to emerge, software for this purpose is something nonprofits can rarely even stop to think about, let alone afford.

Cornerstone OnDemand has stepped in to address an often overlooked and underserved need in the nonprofit community. Every year, Cornerstone OnDemand invites nonprofits to apply for their Strategic Partnership program, under which grantees are awarded software and consulting services at no cost. What makes Cornerstone OnDemand's model one of open-ended outsourcing is not their technology platform, but rather the open and ongoing access each client has to help desk and support services to make the most of the technology. Clients are assigned a dedicated account manager to whom they can outsource their human resources and talent management needs. Furthermore, Cornerstone OnDemand's business model is structured so that client satisfaction is measured equally across paying clients and pro bono clients.

SECTOR-WIDE SOLUTION

A company customizes its products and services for a nonprofit audience and makes them available to a specific number of nonprofit organizations on an ongoing, as needed basis.

The sector-wide solution model involves customizing solutions for a nonprofit audience based on a company's existing products or services. The model makes a critical resource available to nonprofits that could not have otherwise afforded it, while gaining recognition for the company.

OPTIMAL CLIENT OR IMPACT AREA

A sector-wide solution allows you to optimize the impact and reach of your pro bono program by delivering a solution that meets shared needs across the nonprofit sector and can have a wide, scalable impact. This model can be used to serve the general nonprofit community, while staying issue agnostic.

IMPACT ON CLIENT

This model is a great way to make an innovative product and service available to nonprofits that would otherwise have not been able to afford the investment. Customization means that nonprofits are ensured impact from a tool that has already been proven to work in other areas.

PROVIDER COST

This model can deliver the most bang for your buck but comes with a very high upfront cost. The cost depends on the complexity and sophistication of the tool and the discrepancy between an existing product and the human capital required to tailor it to the sector.

TOP COMPANY GOALS MET

Reputation: By making a critical resource available to the larger nonprofit community, the company can gain significant recognition.

CASE STUDY: SALESFORCE.COM NONPROFIT EDITION

Salesforce.com has enabled thousands of businesses to better manage data that is critical to their sales operations and customer relationships. In 2006, the company launched a nonprofit-specific edition, making it available free of charge to qualifying organizations, tailored to address the most common needs of the nonprofit sector, such as donor and volunteer management.

When faced with the opportunity to strengthen the nonprofit sector, Salesforce.com chose to concentrate its resources towards developing a highly scalable product or service that could address the most common sales-related needs of the nonprofit sector. With just one product, the Salesforce.com Foundation is able to address a sector-wide issue with an appropriate sector-wide solution.

Salesforce.com also offers auxiliary pro bono implementation and consulting services. Although the service is complementary to the sector-wide solution, it is important to consider the capacity of the nonprofit sector to fully take advantage of a sector-wide solution such as Salesforce.com's Nonprofit Edition.

GENERAL CONTRACTING

An entity coordinates and oversees internal and external resources, promoting cross-sector collaboration to address a specific social problem.

General contracting is a high-impact model for addressing a specific issue area. By coordinating and collaborating with other companies and organizations working within the same issue area, projects delivered through this model can deliver significant results. The model additionally provides opportunities to develop talent, strengthen client relationships, and experiment in the field.

OPTIMAL CLIENT OR IMPACT AREA

General contracting is the right fit if you are looking to impact a broad issue area. The issue area may align with your company's core offering or be something that is near and dear to your employees or the community in which you operate.

IMPACT ON CLIENT

This model's strength lies in its unique, interdisciplinary approach to coordinating pro bono work and its powerful ability to engage multiple stakeholders and affect issue areas.

PROVIDER COST

This model will deliver a relatively low volume of pro bono work at a relatively high cost because of the amount of coordination and oversight necessary. When executed properly, however, a small number of projects can greatly impact focused issue areas.

TOP COMPANY GOALS MET

Human Capital: Contributing companies have cited professional development opportunities for their employees, a chance to develop deeper relationships with clients by advancing their social missions, and the opportunity to develop new tools and organizational capabilities as major factors in choosing to participate.

Reputation: Participating companies gain visibility through working together and across industries.

CASE STUDY: CIVIC CONSULTING ALLIANCE

The Civic Consulting Alliance mobilizes and directs pro bono resources from the private sector to solve Chicago's greatest civic challenges. Civic Consulting begins their process by asking large societal questions and then breaks them down into smaller, more manageable pieces, which they then contract out to Chicago's top consulting firms. Their staff not only contracts work out to partner firms, but they also serve as consultants themselves, often leading or staffing consulting engagements, serving as the glue for engagements.

By employing this strategy, Civic Consulting has helped improve the lives of thousands of Chicago students and millions of commuters through their work with entities such as Chicago Public Schools and the Chicago Transit Authority. A testament to the power of their work, Civic Consulting has saved Chicago bus customers 500,000 hours per month of waiting through a project to reduce a phenomenon called "bus bunching," in which a route becomes highly irregular, causing groups of buses to back up and arrive one right after another. This effort was just one small part of an overall effort to make Chicago's transit authority the most innovative and fastest growing in the nation.

The general contracting model is most often operated by an intermediary organization, but it poses itself as an opportunity for companies to contribute their professional competencies by collaborating with other companies and organizations that want to solve a larger social problem.

SIGNATURE ISSUE

The combination of formal pro bono work with additional corporate assets for the purpose of leveraging significant internal resources against a specific social issue.

The signature issue model optimizes internal resources by combining pro bono work with other types of corporate philanthropy to concentrate on a single social issue. The hallmark of this strategy is the ability to deeply engage and impact one issue area, while significantly raising the profile of your company.

OPTIMAL CLIENT OR IMPACT AREA

The signature issue model is a great choice if you want to impact a specific issue area. The issue area may align with your company's core offering or be something that is near and dear to your employees or the community in which you operate.

IMPACT ON CLIENT

The strength of this model is in combining pro bono support with other corporate resources for the benefit of the nonprofit.

PROVIDER COST

The success of this model lies in the scale and customization of the campaign. A powerful campaign may be extremely resource-intensive.

TOP COMPANY GOALS MET

Human Capital: Companies that creatively make the most of a full range of assets can provide substantial development and leadership opportunities for its people.

Reputation: Projects associated with a signature issue are high profile endeavors that, when successful, can lead to even more visible outcomes.

CASE STUDY: DELOITTE LLP

Deloitte has made a signature commitment to supporting education, with a specific focus on increasing college access to help develop the talent of the future. Through its program, Deloitte is involved in a variety of initiatives aimed at increasing college enrollment rates amongst low-income students. In support of the goals it shares with College Summit, a leading voice on college access, Deloitte brings a variety of corporate assets to bear, including formal pro bono work, significant cash giving, skilled volunteerism, national and local board leadership, and ad hoc specialized counsel, in order to make a social impact.

Deloitte spent more than a year developing a multi-million dollar data warehouse for College Summit. The data warehouse has helped the organization increase its own productivity in delivering information to schools by 87% in some cases, which means College Summit staff spend less time generating reports and more time positively impacting the students' lives. Another outcome is a 300% increase in the number of schools that receive college enrollment rate information from College Summit and can act on it immediately with students. In addition, College Summit reports a 20 percent increase in college enrollment among program participants.

As a signature effort, Deloitte continues to provide specialized pro bono support to College Summit, which is helping the organization not only function more effectively, but also pilot important new revenue streams. This integrated support is enabling College Summit to change the lives of low income students across the country and, ultimately, to move the needle on an issue that is extremely important to Deloitte.

PRO BONO MANAGEMENT

SUMMARY, EXTENDED OVERVIEWS, & CASE STUDIES

MODEL	DESCRIPTION	COMMON OBSTACLES	BEST PRACTICES
THE PROJECT IS COMPLETED IN A TIMELY MANNER	Time is the medium of exchange when setting up a Pro Bono Projects. Creating accurate project timelines minimizes conflict and increases the likelihood of sustaining the relationship between the pro bono consultant and client. Document p.63	‣ Scope Creep ‣ Team Turnover ‣ Prioritization	‣ Approved Timeline ‣ Formal approach to timeliness ‣ Roles and responsibilities ‣ Fixed milestones
THE DELIVERABLE IS IMPLEMENTABLE & SUSTAINABLE	The deliverable is only a relevant milestone if the client can implement and sustain it. Document p.64	‣ Nonprofit Fit and Readiness ‣ Gap in Technical Knowledge ‣ Limited Resources	‣ Nonprofit Assessment and Project Adaptation \ ‣ Accommodating Deliverable Design ‣ Training & Ownership
THE CLIENT'S AND PRO BONO CONSULTANTS' EXPECTATIONS ARE MET OR EXCEEDED	At the beginning of a project, design high quality and feasible deliverables Document p.65	‣ Unarticulated, Unaligned Expectations ‣ Expectations of Low-Quality ‣ Pro bono consultant Skill Suitability	‣ Mutually Acknowledged Scope of Work ‣ Pro bono consultant Screening ‣ Mutually Acknowledged Needs and Consistent Standards
ALL THE PARTIES INVOLVED REPORT HIGH SATISFACTION WITH THE GROUP'S INTERACTIONS	Establish a workflow that both focuses on project impact and emphasizes mutual satisfaction for the Pro bono consultant and Client. Document p.66	‣ Disproportionate Emphasis ‣ Unarticulated Expectations ‣ Unclear Roles and Responsibilities	‣ Align Everyone Around Impact First ‣ Mutually Acknowledge Elements of Satisfactions ‣ Build Interactions into Workplan ‣ Celebration
THE CLIENT REPORTS THE PROJECT MADE AN IMPACT	Every element of a pro bono project should be crafted with the client's desired impact in mind Document p.67	‣ Unarticulated Outcomes ‣ Focus on Experience instead of Impact	‣ Establish and Outcome Model

THE PROJECT IS COMPLETED AND DELIVERED IN A TIMELY MANNER

Since time is a limited resource for both the pro bono consultants and the client, it is important to think ahead about how you will work together to keep the project on track and on time.

Completing a pro bono engagement in a timely manner is important for the service provider and the client, as since in lieu of payment, the 'budget' allocated for a pro bono project is the pro bono consultants' time. If a project takes longer than intended, either in duration or in total number of hours dedicated, there is a high risk of losing pro bono consultants from the team, undermining the quality of the project, or simply not completing the project.

Time is also a limited resource for the pro bono client. While the client is not paying cash for the project, they are providing their employees' time, another scarce resource. A project that takes longer than originally determined also means delayed implementation and value for the client – or, if the project cannot be completed or is finished too late to be implemented, it will be of no use to the client.

COMMON OBSTACLES

- SCOPE CREEP. While it often stems from good intentions, an expanded or straying scope often leads to a project running overtime, failing to meet the original need of the project, or providing deliverables (ie. tools, strategies, or documents) the client is not prepared to implement. Both the pro bono team and the client team can drive scope creep.
- TEAM TURNOVER. Project tardiness is commonly caused by losing a team member, either on the pro bono or client team. Without payment, a traditional driver of commitment and accountability, a pro bono project's timeliness is easily derailed by team turnover.
- PRIORITIZATION. Whether team members are engaging in pro bono service as part of their workdays or as extracurricular activities, pro bono projects are often marginalized by not receiving the same level of priority and time allocation as paid projects.

BEST PRACTICES

- APPROVED TIMELINE. Establish a clear scope for the project, including a detailed timeline. The client and pro bono consulting team should sign off on this document before work begins. The timeline should be realistic given the availability of the pro bono consulting and client team members. Deadlines should accurately reflect a realistic pace for both teams.
- FORMAL APPROACH TO TIMELINESS. Both parties should be clear they must work together to keep the project on track as timeliness is critical. This means adhering to the set scope and not adding elements that require more time without formally revising the timeline, as well as having both parties agree and commit to the modification – just as you would formally adjust the budget and contract for a paying client.
- ROLES AND RESPONSIBILITIES. At the outset, establish clearly articulated roles and responsibilities and the decision-making structure for the pro bono and client teams. In addition to helping solidify accountability and commitment to the project, this also aids in filling vacant roles and expertise if turnover occurs.
- FIXED MILESTONES. With the client, identify a minimum of three key fixed milestones over the course of the project (e.g. completing focus groups or the first draft) to be used as reference points during the project to gauge how it is progressing and what, if any, adjustments need to be made to the timeline to stay on track. Based on when these milestones are reached, the pro bono and client teams should have a clear, shared sense of when the next milestones and ultimate completion will occur.

THE DELIVERABLE IS IMPLEMENTABLE AND SUSTAINABLE

No one wants a pro bono project sitting on the shelf, so make sure the nonprofit is ready to take on the project and is prepared to implement the project before the engagement ends.

The deliverable is only a relevant milestone if the client can implement and sustain it.

COMMON OBSTACLES

- NONPROFIT FIT AND READINESS. For a client to get value from a pro bono project and its deliverables, the benefits of the project have to outweigh its costs. With pro bono service, the cost is the amount of time and resources a client has to invest. Two factors prevent projects from being successful for this reason: fit and readiness.
    - FIT: When the focus of a project does not directly address a high-priority need for the client, it is not worth either team's time. The deliverable should strategically address pressing issues.
    - READINESS: To get the most out of a pro bono engagement, the client organization needs to work effectively with a team of consultants who relate to the specific project type. Common challenges include limited staff bandwidth, an unclear decision-making process, and/or lack of internal employee support and commitment to the project's completion.
- GAP IN TECHNICAL KNOWLEDGE. The consultant's technical expertise is critical to complete the deliverable, but its implementation and sustainability depend on the existence or transfer of some technical knowledge to the client. Because of staffing and resource constraints, the client organization may not have the necessary technical expertise. This can greatly undermine the likelihood of a deliverable being implemented and sustained and therefore having impact on the organization.
- LIMITED RESOURCES. Many public interest organizations have limited financial resources. This may impact the organization's available budget for implementing and maintaining the deliverable.

BEST PRACTICES

- NONPROFIT ASSESSMENT AND PROJECT ADAPTATION. For pro bono service to be beneficial, it must be the right project at the right time. Before deciding to engage in a project, the consulting team's point person and client lead should have a conversation to assess the proposed project's fit with the client's needs, and their readiness to work with a pro bono team. Review the project's scope, discuss the client's anticipated time commitment, and inquire about organizational decision-making practices. If any challenges are identified during this conversation, adjust the project's work plan to allow the client extra time to address specific impediments.
- ACCOMMODATING DELIVERABLE DESIGN. A deliverable needs to be designed to work within a client's limitations. For example, if a client receiving a pro bono brochure design has a limited budget to cover printing costs, the design should accommodate it. If the pro bono consulting team produces a design that uses multiple colors, is intended for glossy paper, involves a lot of pages, etc., it will be a challenge for the organization to implement the brochure. Instead, the project scope (that is articulated and agreed to at the beginning of the project) should include a detailed definition of the completed deliverable so implementation and maintenance needs are understood from the outset. In this example, a pre-determined brochure length, style, and printing budget should be discussed.
- TRAINING AND OWNERSHIP. Training should always be built into the final stages of a project. By identifying a client team member as the 'owner' of implementation and maintenance, and incorporating training into a specific pro bono consultant's responsibilities, the team will ensure proper consultant-client expertise transfer. When the deliverable is completed, the trainer should create a manual or presentation and conduct a training session with the client 'owner.' If there are other critical stakeholders, they should also receive training. This should be done by 'training the trainer' – equipping the client 'owner' to replicate necessary training for other relevant stakeholders. For example, a pro bono branding project creating key messages for an organization must include training the client 'owner' in charge of communications on how to start incorporating the messaging into the organization's communications. It should also enable that person to provide similar training to the organization's board of directors, executive director, and other necessary stakeholders in order for the messages to be implemented effectively.

THE CLIENT'S AND PRO BONO CONSULTANTS' EXPECTATIONS ARE MET OR EXCEEDED

Aligning expectations early and implementing ways to maintain quality ensure that both the client and pro bono consultants' expectations are met.

With pro bono service, the adage "You get what you pay for" should never ring true. As with other consulting engagements, a key component in defining a project's success is meeting the client's expectations. With pro bono service, this takes on a new level of complexity. In addition to keeping client expectations in check so they are not unrealistically grand, truly valuable pro bono projects start by overcoming inappropriately low expectations held by both the client and pro bono consultants. As a result, quality controls must be put in place to ensure high-quality expectations are clear, appropriate and obtainable.

COMMON OBSTACLES

- UNARTICULATED, UNALIGNED EXPECTATIONS. While the client and the pro bono teams may refer to a project's desired output by the same name (e.g. "new website"), definitions and expectations can often differ if they are not mutually articulated and agreed upon. This is particularly true if the level of technical understanding differs between the client and the pro bono consultants. Additionally, expectations regarding working interactions between teams throughout the engagement are more important than on traditional paid consulting engagements, since satisfaction is part of the implicit "payment" pro bono consultants receive for their service.
- EXPECTATIONS OF LOW-QUALITY. It might be easy to set low expectations on a pro bono project, however, this approach sells the client and the pro bono consultants short. Both sides should expect the same level of quality as on a paid engagement. Clients assume since they are getting the project for 'free' they do not have the right to expect the same level of quality. As a result, clients do not stand up for the quality of work they are entitled, and accept sub par work. Similarly, pro bono consultants expect a lower-quality project is adequate because it is better than nothing. This, too, will negatively affect a project by inviting a lower level of commitment to the project, and producing a less valuable deliverable.
- PRO BONO CONSULTANT SKILL SUITABILITY. Since pro bono and paid engagements must be of the same quality level, the relevant expertise and experience of the team must also be comparable. The quality will suffer if the necessary skill level is not present.

BEST PRACTICES

- MUTUALLY ACKNOWLEDGED SCOPE OF WORK. At the project's start, a mutually agreed upon project scope must be created and included in a service agreement. It should articulate expectations including what the final deliverable entails, how it is intended to be used, as well as the work, information and time requirements necessary to create it.
- PRO BONO CONSULTANT SCREENING. The pro bono team's composition must be comparable to that of a paid project team. This means designing the team structure with the same roles by screening every member of a pro bono team to ensure all necessary competencies and experiences are present. The pro bono consulting team should include a project manager in addition to content specialists.
- MUTUALLY ACKNOWLEDGED NEEDS. To ensure the deliverable is designed for maximum impact, the pro bono consulting team and the client should understand the client's direct needs. The pro bono consultants should create a requirements brief or memorandum of understanding after conducting an initial discovery phase, then the client should review, share, revise, and sign off on it. This way, the scope of work is always based on an accurate and defensible understanding of client's specific needs. For example, on a website project, this could include the organization's target audience/users, brand attributes, technical requirements, and desired short and long-term outcomes.
- CONSISTENT STANDARDS. Every aspect of a pro bono project's quality must be on par with that of a paid project; from expectation setting, preparation and relationship management, to time management and delivery. This applies both to the pro bono consulting team and the client, as they must dedicate the same quality of work to this project as they do to program delivery. By adhering to the same standards of excellence, a pro bono engagement can meet even the highest expectations.

ALL PARTIES INVOLVED REPORT HIGH SATISFACTION WITH THE GROUP'S INTERACTIONS

The unifying purpose on all pro bono engagements is client impact, but it is also critical to build in ways to ensure the experiential satisfaction of the client and the pro bono consultants.

As opposed to traditional paid engagements, the pro bono consultants' satisfaction is especially important as it is part of the implicit 'payment' they receive. However, there must be a balance between focus on client versus pro bono consultant satisfaction, as well as overall satisfaction.

COMMON OBSTACLES

- DISPROPORTIONATE EMPHASIS. On a pro bono engagement, there are two ways emphasis is inappropriately placed on satisfaction. The first is focusing more on the pro bono consultants' satisfaction than the deliverables impact. The second is focusing only on the pro bono consultant's experiential satisfaction and not that of the client. Both have potential to undermine the success of a project.
- UNARTICULATED EXPECTATIONS. Disappointment stems from a gap between someone's expectations and their experiences. Without understanding each stakeholder's expectations, it is difficult to ensure a high level of satisfaction.
- UNCLEAR ROLES AND RESPONSIBILITIES. Team members' dissatisfaction with each other often stems from frustration and miscommunication about roles and responsibilities on a project. This includes perceptions a team member is overstepping his/her authority (and therefore undermining someone else's), or team members are not fulfilling the assumed responsibilities of their respective roles. These examples apply to both the pro bono consulting team and the client team.

BEST PRACTICES

- ALIGN EVERYONE AROUND IMPACT FIRST. While a pro bono project always has several desired short- and long-term outcomes, including those related to participant satisfaction and experiential benefit, the underlying focus must always be on client impact. A helpful best practice is to incorporate a statement to this effect in the initial service agreement, aligning both parties to the ultimate priority in addition to acknowledging the scope of work and other project elements
- MUTUALLY ACKNOWLEDGED ELEMENTS OF SATISFACTION. The client team and pro bono consultants should be aware of each others' desires and expectations for the pro bono engagement. What are the pro bono consultants' motivations for being involved in pro bono service? How do both teams prefer to communicate, and with what turnaround time? The client and pro bono consulting teams should articulate and acknowledge these and other expectations, standards, and work preferences upfront. By doing so, the combined team is able to correct unrealistic expectations, norm across differences, and pay more deliberate attention to meeting all reasonable expectations. This helps ensure expectations, and the experience as a whole, are crafted thoughtfully.
- BUILD INTERACTION INTO PROJECT WORKPLAN. While working virtually is increasingly accessible, particularly on a pro bono basis (e.g. for a previously unknown client, with a new team, with fewer accountability and trust mechanisms in place, etc.), It is important to build-in opportunities for interaction into the work plan. What meetings and desired work plan outcomes are best accomplished in person? What trust and relationship-building activities can be enhanced by face-to-face interaction? Additionally, every participant's responsibilities should be clearly spelled out so every interaction is based on a common understanding.
- CELEBRATION, thanks and recognition. Since pro bono projects do not include monetary payment, it is essential the pro bono consultants enjoy some form of thanks and recognition. Just like a hands-on volunteer activity is often rewarded with a thank you card or celebration, the pro bono project's completion should include recognition for the participants' time and work.

THE CLIENT REPORTS THE PROJECT MADE AN IMPACT

Clarifying at the outset the different types of impact and desired results that are tied to a pro bono engagement helps the client and pro bono consultants work together toward achieving the ultimate goal of positive client impact.

While every pro bono project's desired long-term outcome is to have a positive impact on the client organization, there are often multiple types of impact the client hopes to have. To achieve the desired results, every element of a pro bono project should be crafted with those specific desired outcomes in mind.

COMMON OBSTACLES

- UNARTICULATED OUTCOMES. Pro bono projects often start articulating only the desired outputs – i.e. what is produced (a printed brochure, a live donor database, etc). A project's outcomes are another category altogether, and must be spelled out at the outset of a project. Some examples of pro bono project outcomes include: a redesigned website producing increased online donations or an HR performance management system resulting in a decrease in employee turnover.
- FOCUS ON EXPERIENCE INSTEAD OF IMPACT. As highlighted in the previous section, a pro bono consultant's experience on the project is an important aspect of a project's success. At the same time, a positive experience should never come at the cost of lowering the value of the deliverable. While dedicating fewer hours or dabbling in team roles where a consultant has interest but not sufficient skill might make a pro bono consultant's experience more enjoyable, both put the work's impact in jeopardy. This is a particularly common risk when corporate volunteerism managers are evaluated primarily based on the employees self-reported experiences on pro bono projects instead of the impact on the clients. Projects should be scoped so participants enjoy their experience while producing meaningful results for the client.

BEST PRACTICES

- ESTABLISH AN OUTCOMES MODEL. All service initiatives can follow a logic model that spells out: a project's inputs (what resources will be used?), activities (what work will be done?), outputs (what will be produced?), short-term outcomes (what are the immediate effects of the work?), and long-term outcomes (how will this project help the client's big picture going forward?). To have a successful engagement and to enable effective measurements, each component of this model should be filled in and agreed upon by the lead on the pro bono consulting team and the client at the outset of the project. Remember to consider the desired outcomes for all stakeholders involved – the client team, the pro bono consulting team, and the client organization as a whole. Each stakeholder enters the project with desired outcomes in mind so it is best to be direct and acknowledge them up front so all the work is ultimately informed by these expectations, while placing the ultimate priority on positively impacting the client.

FORM SERVICE AGREEMENT

This SERVICE AGREEMENT (the "Agreement"), dated and effective as of [ ], between [ ] ("Company"), a [corporation/limited liability company/partnership] having its principal offices at [ ], and [ ] ("Client"), a nonprofit organization organized under Section 501(c) of the Internal Revenue Code having its principal offices at [ ].

RECITALS

WHEREAS, Company seeks to provide services to Client on a pro bono basis as set forth below;

WHEREAS, Client seeks to engage Company to perform those services;

WHEREAS, Company and Client desire to set forth the terms and conditions of their understanding;

NOW, THEREFORE, in consideration of the foregoing premises and the terms and conditions set forth herein, the sufficiency of which is hereby acknowledged, Company and Client (collectively, the "Parties") agree as follows:

1. **Provision of Services**. Company agrees, subject to the terms and conditions stated herein, to provide such services to Client as set forth in the attached Schedule A (referred to here as the "Scope").

1.1 The estimated value of the services set forth in the Scope is [ ].

1.2 [The Company's services to Client will not include any business, investment, insurance or accounting advice, any investigation into the character or credit status of persons or entities with whom you may be dealing, or the handling of an appeal in the case of litigation.]

2. **Cooperation.** Client agrees to make reasonable efforts to cooperate with Company in connection with the services provided by Company, including without limitation, making itself reasonably available when needed, including setting aside times for meetings and telephone calls with Company.

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3. **Costs.**

3.1 Option 1: [Company will be responsible for the following costs incurred while providing services or deliverables to Client as set forth in the Scope: document reproduction, on-line or computerized research, facsimile charges, messenger and courier services, postage charges, printing, secretarial or administrative overtime, travel and parking, and document processing services. Company will not charge Client for these costs. However, unless Company agrees in writing, Company will not pay any other costs or service charges which may be incurred during the provision of services.]

3.2 Option 2: [Company will be responsible for all costs incurred while providing services or deliverables to Client as set forth in the Scope up to, and not exceeding, the amount of [ ]. If Company plans to incur costs in excess of [ ] (the "Excess Costs") in providing services or deliverables to Client, the Excess Costs will first be submitted to Client for prior approval. Upon Client's approval, Client will be responsible for the Excess Costs, and Client will reimburse Company for the amount of the Excess Costs within such time period as the Parties mutually agree upon.]

3.3 Option 3: [Client will be responsible for all out-of-pocket expenses associated with the services or deliverables provided by Company to Client as set forth in the Scope. Client will reimburse Company for all such costs incurred on behalf of Client by Company, including without limitation, document reproduction, on-line or computerized research, facsimile charges, messenger and courier services, postage charges, printing, secretarial or administrative overtime, travel and parking, and document processing services.]

4. **Term.** Subject to the terms and conditions stated herein, the term of this Agreement shall commence on [ ] and end on [ ], and thereafter may be extended by mutual agreement of the Parties.

5. **Termination.** Both Company and Client shall be entitled, each in its sole discretion, to terminate this Agreement upon at least seven days' written notice to the other party. Such termination can occur with or without cause, including when there has occurred, without limitation: (i) a material breach by Client or Company of the Agreement, (ii) a material change in the mission, leadership, or day-to-day contact person of Client, (iii) an adverse change in the financial condition of Company or Client, (iv) harassment of or other unprofessional conduct towards employees of the Company by Client or (v) failure of Client to cooperate in connection with the services provided by Company, as set forth above in Section 2.

6. **Promotional Use, Marketing, and Publicity.**

6.1 Subject to prior review and approval by Client, Client agrees to grant Company the right to use the results, materials, and products developed under this Agreement for its marketing and other promotional uses.

6.2 Subject to prior review and approval by Company, Client will have the option to publicize the receipt of services rendered by Company, through, for example, publishing a press release or placing an announcement in its newsletter or website.

7. **Representations and Warranties.**

7.1 Company makes no representations, warranties or guarantees, expressed or implied, with respect to any services or deliverables provided by Company to Client as set forth in the Scope.

7.2 Client represents and warrants that it (i) has read and understands the terms of this Agreement in its entirety, including the Scope's description of services and deliverables to be provided by Company, and (ii) has had the opportunity to review this Agreement, including the Scope, with independent legal counsel.

8. **Liability and Indemnification.**

8.1 Company shall not be liable to Client or Client's employees, directors, agents or affiliates for any damages or losses caused by the activities of Company or the Company's employees, directors, agents or affiliates related to this Agreement, except when such activities constitute negligence or willful misconduct by the Company.

8.2 Client agrees to indemnify, defend and hold harmless Company and Company's employees, officers and directors from any and all liabilities, damages, costs, loss or expense (including attorneys' fees) resulting from or arising out of (i) any claim by Company or any third party relating to the conduct of Client, its employees, agents or contractors in connection with this Agreement and (ii) any claim by a third party relating to the use of any deliverables under this Agreement.

9. **Arbitration.** The Parties agree to resolve any disputes they may have with each other through final and binding arbitration. Arbitrations shall be conducted by JAMS in accordance with its employment dispute resolution rules. The Parties acknowledge that they understand this section's arbitration requirements and that arbitration would be in lieu of a jury trial.

10. **Assignment.** Client may not assign this agreement or interest therein to any affiliate or third party. Company may assign or delegate any duty hereunder without prior consent of Client.

11. **Severability.** To the extent that any provision of this Agreement may be invalid, illegal or unenforceable for any reason, such provision shall be enforceable to the extent that a court of competent jurisdiction shall determine that such provision, if more limited in scope, would have been enforceable, and such provision shall be deemed to have been so written and the remaining provisions as written shall be effective and enforceable in all events.

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12. **Headings.** All headings herein are inserted only for convenience of reference and are not to be considered in the construction or interpretation of any provision of this Agreement.

13. **Choice of Law.** This Agreement shall be governed by and construed in accordance with the internal laws of the State of [ ], irrespective of the choice of law principles thereof.

14. **No Joint Venture.** Nothing contained herein shall be construed to place the Parties in the relationship of partners or joint venturers. The Parties acknowledge that Company is an independent agent not affiliated with Client other than with respect to the matters referenced herein.

15. **Counterpart.** This Agreement may be executed in two or more counterparts, each of which shall constitute an original, but all of which, when taken together, shall constitute but one instrument.

16. **Confidentiality.** Under this Agreement, it may be necessary for Company or Client (the "Disclosing Party") to disclose information of a confidential or proprietary nature to the other party (the "Receiving Party"). For purposes of this Agreement, "Confidential Information" means any business development, technical, financial or other information, whether in oral, written, machine readable or other form, that: (i) is originated by, or otherwise peculiarly within the knowledge of, or proprietary to the Disclosing Party; (ii) is currently protected against unrestricted disclosure under the terms of an applicable non-disclosure agreement; or (iii) pertains to the core business of the Disclosing Party.

16.1 The Receiving Party shall hold any Confidential Information it receives from the Disclosing Party, directly or indirectly, in strict confidence, and agrees to refrain from the use of such Confidential Information for any reason not contemplated by this Agreement.

16.2 Notwithstanding the expiration of other portions of this Agreement, the obligations and provisions of this Section 16 shall remain in effect for as long as any particular data or information is considered by the Disclosing Party to be Confidential Information.

17. **Intellectual Property.**

17.1 Client shall own all right title and interest (including without limitation worldwide rights of patent, trademark or copyright) in and to all ideas, concepts, plans, creations, trademarks, trade names or work product produced, created or developed by Company pursuant to this Agreement, including without limitation, all deliverables and any writings, drawings and documentation of any kind (collectively, the "Works"), and, to the extent possible, all such Works shall be considered works made for a hire for Client within the meaning of Title 17 of the United States Code and other applicable laws. With respect to any Works that do not fully qualify for treatment as a work made for hire under the applicable copyright laws, Company hereby grants, transfers and assigns to Client all of its right, title and interest in and to such Works and all

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materials contained therein or prepared therefor, including all rights of patent, trademark or copyright, across all media, whether now known or hereafter devised, throughout the world, in perpetuity. Company hereby grants to Client an irrevocable, non-exclusive, worldwide, royalty-free license to use, execute and copy for its internal purposes any pre-existing materials contained in the Works. Company shall use its reasonable efforts to cooperate with Client and shall execute such further documentation as Client may reasonably request in order to establish, secure, maintain or protect Client's ownership of the Works and all rights therein.

17.2 For the avoidance of doubt, Company and Client shall each retain exclusive ownership of all right, title and interest, including without limitation, all titles and rights, in and to their respective intellectual property created independently of or prior to this Agreement ("Pre-Existing Intellectual Property"). Nothing in this Agreement is intended to grant to or confer upon Client, by implication, estoppel, or otherwise, any right, title, license or other interest in or to Company's Pre-Existing Intellectual Property. To the extent that any of Company's Pre-Existing Intellectual Property is incorporated or otherwise included in any Works created by Company hereunder, Company hereby grants to Client a non-exclusive, irrevocable, perpetual, worldwide, fully-paid, royalty-free license to use Company's Pre-Existing Intellectual Property in connection with Client's use of such Works.

18. **No Other Amendment or Modification.** This Agreement shall remain in full force and effect without modification. The terms and conditions of this Agreement shall not be amended, modified, altered or supplemented other than by a means of written instrument duly executed and delivered on behalf of Company and Client.

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19. **Notices.** All notices required or permitted hereunder shall be in writing and shall be deemed to have been given when received, if delivered by facsimile, registered mail or overnight courier, in all instances, all charges prepaid, addressed as follows:

If to Company: [ ]

If to Client: [ ]

IN WITNESS WHEREOF, the parties have executed this Agreement as of the day and year first above written.

On behalf of the Company

By: ______________________________

Name:

Title: ______________________________

____

On behalf of the Client

By: ______________________________

Name:

Title: ______________________________

____

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SCHEDULE A

SCOPE

- [**Summary:** high-level summary of the services and deliverables (i.e., accounting services, marketing consultation, IT support, etc.) to be provided by Company.]
- [**Initial phase:** describe the activities or foundational information necessary in the initial phase to establish the Requirements Brief.]
- [**Requirements Brief (or similar document**): creation of a document to be approved by Client to create an understanding between Client and Company to acknowledge the basic organizational information and requirements for the services and deliverables Company will be providing.]
- [**Initial milestone:** Company should provide Client with different options that Client may select (if any) at this stage.]
- [**Revision parameters:** describe the revision rounds Client may have and what type of feedback from Client to Company will be necessary.]
- [**Final services and deliverables:** describe the final services and deliverables that Client may expect to receive at this stage from Company.]
- [**Implementation-specific needs:** describe any additional requirements (information, training, etc.) that Company must provide in order to make its services and deliverables implementation-ready for Client.]
- [**Examples of costs:** describe what type of costs may be assumed by Client.]
- [**Criteria for completion:** the project is complete when:
    - ◊ [Company has delivered an annual report in the determined format with directions for services in subsequent years and Client has conducted evaluations of the project.]
    - ◊ [The term of the Agreement has expired pursuant to Section 4.]
    - ◊ [Company or Client has elected to terminate the Agreement pursuant to Section 5.]

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