

2018  
**U.S.  
PRO BONO  
SUMMIT**

**The Upshot**



The Taproot Foundation's U.S. Pro Bono Summit is an annual gathering of leaders from across sectors and industries with a shared vision to make the talents and skills of the business community accessible to social change organizations.



The 7th annual Summit was held in San Francisco on April 18 and 19. Over the course of two days, 100+ CSR, nonprofit, and government leaders from across the country gathered to dig into topics ranging from tackling food access through pro bono to aligning programming with talent development strategies. Dive in to explore key takeaways from the days.

**Sponsored by:**



**FOUNDATION**

# APRIL 18 NEW WAYS FORWARD

Leaders from across sectors came together to identify and co-design new pro bono solutions for pressing challenges including food access, developing leaders, and driving technology adoption and use in the social sector. The result: new areas for pro bono support via an increased understanding of the organizational needs of nonprofits; an exploration and understanding of the tools nonprofits and volunteers need to create high-quality pro bono outcomes and experiences; and a commitment to make the most of pro bono service through forward-looking conversations about the future application of business talent to social sector issues. Here are three takeaways from the day.



## WE CAN SHIFT THE PRO BONO POWER DYNAMIC

Participants were eager break down the inherent power dynamic within pro bono, one that sees the volunteer as the “provider” and the nonprofit as the “recipient.” Recognizing where this dynamic plays out—and identifying how to flip it—can begin to build increased equity between participants. Key learnings include:

**Changing language:** Words matter. For pro bono, describing a volunteer as an “expert” establishes their value-add but can also create a “savior” type of feeling for a nonprofit. Calling volunteers “outside practitioners” or “knowledge partners” can help set the tone for a mutual partnership of commitment and expertise.

**Being conscious of ownership, efforts, and outcomes:** Participants believed that nonprofits should carefully consider the balance of ownership, effort, and outcomes and then select projects accordingly. For example, nonprofits can use pro bono service as a way for their staff to practice core leadership skills. Doing so requires the nonprofit to invest time in designing projects that build these skills, but it’s time well spent when the project provides the dual benefit of a deliverable and staff development.

**Learning from nonprofit expertise:** Flipping the pro bono equation means remembering that nonprofits also have a unique area of knowledge to offer. For example, leaders from the social sector are resourceful, creative, and have a scrappy “get it done” approach that can benefit other sectors.

 **Food Craft Institute**  
@FoodCraftInst

"#probono work needs to be done WITH the non-profit organizations, not FOR them" - @taprootfound #PBSummit2018 ...This is why we're in the room today! Thanks Taproot!

2:20 PM - 18 Apr 2018

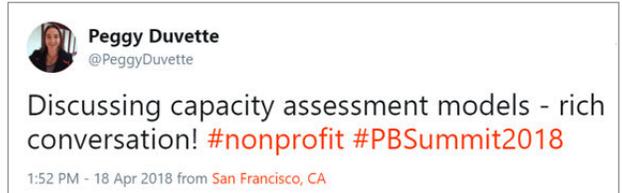
# WE NEED TO MEASURE THE INTANGIBLE BENEFITS OF PRO BONO

The experience of pro bono creates a lasting impression on volunteers and nonprofits alike. But measuring a personal mind-shift is tough. Here is where participants craved tangible measurement for those intangible benefits and how they're overcoming that measurement challenge:

**Measuring empathy:** Companies often hear of employee's life-changing experiences through pro bono. When discussing the benefit of pro bono service, one presenter highlighted that the more people engage in this type of work, the more socially conscious they become. But how do you measure this increased empathy? Figuring out how to measure personal growth in skills like empathy is an opportunity for all sectors to solve.

**Using counterfactual impact evaluation:** Don't let that phrase scare you. This method of measurement simply means looking at what would have happened if the pro bono intervention did not occur. Some corporate participants were already doing this work. They did upfront analyses and set baseline measurements across a series of nonprofits.

By comparing those organizations who did receive pro bono service with those who did not, they were able to understand how their pro bono projects helped organizations save time or energy. Measuring beginning and end states, and using counterfactual measurement, may be one way to quantify the impact



## THERE ARE SPECIFIC PRO BONO OPPORTUNITIES AHEAD

The investigation into the needs of nonprofits and the cross-sector brainstorms sparked new ideas. Here are a few:

**For building leadership:** Outside practitioners can help nonprofits evaluate and define the leadership competencies needed among different positions. This could include defining the core competencies needed to be successful in each role, evaluating an individual's leadership growth, and developing tangible plans to build those skills. These kinds of projects help a nonprofit both focus and execute on leadership development.

**For increasing food access:** Outside practitioners can help nonprofits plan to collect and maintain data. This could include helping nonprofits define their measurement criteria, identify technologies that help them better track their yields, and analyze and report on changing conditions or trends at their organization. All of this helps these organizations better plan for and report on their progress, which can help increase both their programmatic and financial success.

**For driving technology adoption and use:** Outside practitioners can help nonprofits navigate the technology support that is available to them. With a growing community of companies, intermediaries, and organizations dedicated to supporting technology adoption among nonprofits, a unique need is to streamline nonprofits' access to these resources. A shared assessment used by multiple technology providers could help nonprofits more quickly identify their challenge and find the support they need which saves time and energy for everyone.



# APRIL 19 CORPORATE CONVENING

At this year's Corporate Convening, attendees traveled from eight states and represented 36 companies across 10 industries, from hospitality and retail to technology and financial services. Participants were engaged in a full day of sessions and networking designed to help them maximize the impact potential of pro bono programming at their company.

We began the day by acknowledging how much traction corporate pro bono has gained over the last decade and how much work we still have left to do to ensure we keep pushing the field forward. Our focus for the day was to hone in on the field's most critical opportunities in the years ahead, including measuring the impact of our pro bono programs, establishing benchmarks for corporate pro bono, and telling more effective pro bono stories that help build the field.



## PRO BONO SERVICE AS AN ACCELERATOR OF SOCIAL CHANGE: REFLECTIONS FROM NONPROFIT LEADERS

With the rise of #MeToo, shifts in the political landscape, and increased attention to diversity and equity in the workplace, it has been a historic year for women and the organizations that serve them.

We had a conversation with Donna Garske, the Executive Director of [Center for Domestic Peace](#) and Jill Zawiska, the Executive Director of [WOMAN, Inc](#) to explore the transformative role pro bono has had in their work and how it can be leveraged to drive social movements forward.

Jill and Donna shared a few insights for corporate pro bono providers to keep in mind. Here's one of our favorites: The most effective pro bono comes from companies who listen and let an organization's needs inform the prescription, versus those who come with a ready-made solution that may not fit a nonprofit's needs.



**Spring Taylor Lacy**  
@SpringOutLoud

**#Probono** can disrupt the day to day environment to get a bigger vision or understanding -Donna Garske @C4DP  
**#PBSummit2018**

1:19 PM - 19 Apr 2018 from San Francisco, CA

# THE PRUDENTIAL DIARIES: AN UP CLOSE LOOK AT HOW ONE COMPANY ALIGNED ITS PRO BONO AND TALENT DEVELOPMENT STRATEGIES FOR MAXIMUM IMPACT

A growing number of companies are running innovative pro bono initiatives and seeing great results, particularly those that are integrating pro bono as a part of their talent development strategy. Taproot facilitated a conversation with Prudential about their pro bono strategy, how it has evolved over time, and how they've partnered with HR to maximize and measure the impact of their programs.

When it comes to measuring the talent development of their programs, Prudential looks at HR metrics like diversity, retention, and promotion rates among pro bono participants versus the broader Prudential population to better understand how pro bono can support HR objectives. Prudential also shared some tips for achieving a successful partnership between CSR and HR:



**Find the right HR partner** that focuses on talent development.

**Prioritize exposure** so that your HR or CSR counterpart can experience pro bono first-hand.

**Establish shared goals** that can meet both departments' objectives.

**Identify executive champions** within HR and CSR to help make the case for partnership.

**Schedule a working session** to explore what partnership might look like and assign roles and next steps.

## TELL YOUR PRO BONO STORY: HOW THE KEY PRINCIPLES OF STORYTELLING CAN ENHANCE YOUR PRO BONO COMMUNICATION STRATEGY

As the communications landscape continues to evolve on a daily basis, it can be difficult to tell a story that resonates and cuts through the clutter. Alex Heath, VP and Group Director for Edelman's Business + Social Purpose team, captivated the group with an engaging discussion on the principles of storytelling and how they can help us tell our pro bono stories more effectively.

Alex kicked-off the session with an overview of the results of the [2018 Edelman Trust Barometer](#), which gave us a 10,000 foot view of the media landscape. He then took us through a five-step process for crafting a convincing story and had participants begin to draft stories about their pro bono programs. This interactive piece of the session allowed participants to discuss different aspects of the storytelling process, such as who should be telling the story, the importance of picking the right distribution channels, and when to use qualitative versus quantitative data.



## GALVANIZING THE MOVEMENT

Breaking down the power dynamics inherent in pro bono programming, considering the myriad of talent development opportunities for nonprofit and corporate professionals in pro bono, exploring stories of impact... These were only some of the insights shared as part of Taproot's 7th annual US Pro Bono Summit. Each year this one-of-a-kind convening offers leaders and practitioners a platform to come together, discuss, debate, and learn from each other. And each year, the Summit galvanizes a growing movement, catalyzing conversations around the intersection of civic engagement, talent, and societal impact. Looking forward, we're thrilled to announce that in May of 2019 we will bring together the U.S. and Global Pro Bono Summits in New York City!

### WEBINAR: Insights from the 2018 U.S. Pro Bono Summit

Join us for this free interactive webinar as we dig deeper into the key insights of the U.S. Pro Bono Summit. **Tuesday, June 12, 2018** | 1 p.m. EST / 12 p.m. CST / 10 a.m. PST

[REGISTER HERE](#)



### FOUNDATION

Taproot Foundation, a national nonprofit, connects nonprofits and social change organizations with skilled volunteers who provide their expertise pro bono. Taproot is creating a world where organizations dedicated to social change have full access—through pro bono service—to the marketing, strategy, HR, and IT resources they need to be most effective. Since 2001, Taproot's skilled volunteers have served 6,000 social change organizations providing 1.6 million hours of work worth over \$180 million in value. Taproot is located in New York, Chicago, San Francisco Bay Area, and Los Angeles and is leading a network of global pro bono providers in over 30 countries around the world. [www.taprootfoundation.org](http://www.taprootfoundation.org)

*Photo credit: Kevin Meynell*