

DESIGNING FOR IMPACT

A GUIDE TO THE FIVE TENETS OF HIGH-QUALITY PRO BONO SERVICE TO CREATE MAXIMUM IMPACT PRO BONO PROGRAMS

Impact is the number one determinant of success for pro bono service, for volunteers and community organizations alike. The core of successful pro bono service delivery is treating a pro bono client the same as a paying client. To help define what this means, more than 25 companies at the 2008 Pro Bono Roundtable articulated the five characteristics of high-quality pro bono service.

A pro bono project is most successful when all of the following criteria are met:

- ▶ The project is completed and delivered in a timely manner.
- ▶ The deliverable is implementable and sustainable.
- ▶ The client's and pro bono consultants' expectations are met or exceeded.
- ▶ All parties involved report high satisfaction with the group's interactions.
- ▶ The client reports the project made an impact.

Other than producing client impact, the ultimate priority, these outcomes are not prioritized, nor should they be seen as mutually exclusive.

These characteristics set the bar for high-quality pro bono service. Based on the learnings and best practices of professional services firms and the Taproot Foundation's 1,000+ completed pro bono projects, we prepared this guide as a basic framework for designing pro bono projects to meet the highest standards of success. We hope this framework ensures more public interest organizations have access to high-quality professional services so they can achieve their missions.

THE PROJECT IS COMPLETED AND DELIVERED IN A TIMELY MANNER.

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 FOR RISK MITIGATION

- ▶ **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.

The deliverable is only a relevant milestone if the client can implement and sustain it. A completed deliverable the client can not use will seriously compromise both client and pro bono team satisfaction, while failing to meet the client's original need.

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, specifically as it relates 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 is largely dependent 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 FOR RISK MITIGATION

- ▶ **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. Use this time to review the project's scope, discuss the client's anticipated time commitment, inquire about organizational decision-making practices, and so on. If any challenges are identified during this conversation, the project work plan should be adjusted 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 pro bono project. 'Owners' of implementation, individuals in charge of transferring skills related to the deliverable, should be identified at the project's outset. 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.

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, unfortunately, both tend to enter a pro bono project with lowered standards. 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 FOR RISK MITIGATION

- ▶ **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. As with most paid consulting engagements, 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.

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 deliverable's 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 FOR RISK MITIGATION

- ▶ **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 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.

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 FOR RISK MITIGATION

- ▶ **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.

CONCLUSION

We hope this framework will help ensure pro bono projects are designed to meet the highest standards of success and impact. By structuring projects to be completed and delivered in a timely manner, have implementable and sustainable deliverables, meet or exceed both the clients' and pro bono volunteers' expectations, yield reports of high satisfaction with the group's interactions, and most importantly, have an impact on the client, pro bono service has the opportunity to have a transformational impact on all stakeholders involved.

As best practices and tools continue to emerge, this document will be updated to continue to serve as a helpful resource. In addition, we will be providing tools and examples pertaining to these and other best practices in our continued effort to enable effective pro bono service. Do you have examples or tools you would like to share? Please send them to us at advisory@taprootfoundation.org.