Balancing Pro Bono Supply and Demand:

Challenges and Solutions
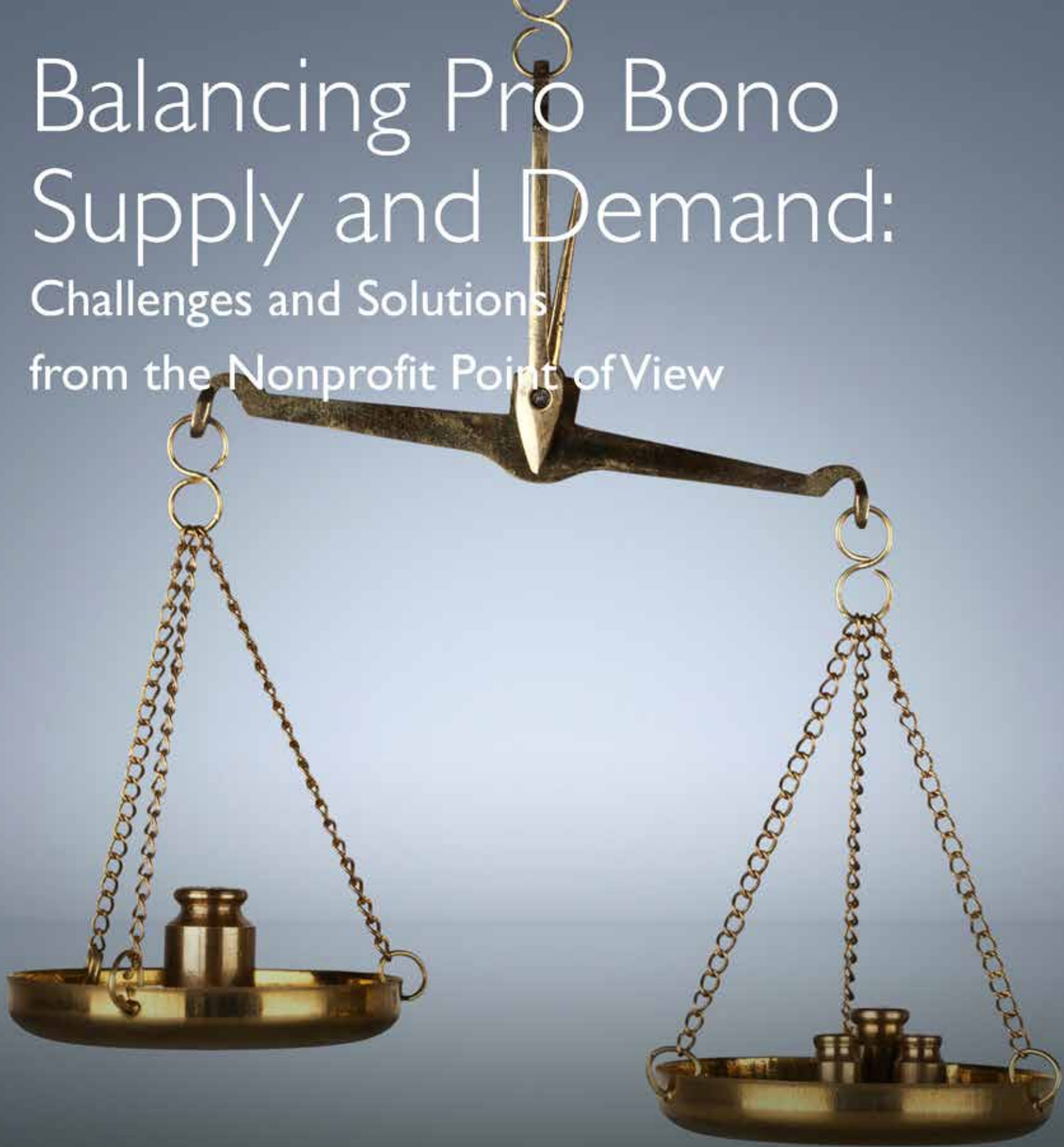
from the Nonprofit Point of View

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Acknowledgments

This report would not be possible without the support of our sponsors and research partners. Sponsors provided not only financial support but also invaluable contributions to the survey content and survey samples and our research partners shared the survey link with the nonprofits in their databases.

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From the Desk of Linda B. Gornitsky, Ph.D.
President, LBG Associates and Founder, LBG Research Institute

The premise of the research was simple. If pro bono volunteers are so helpful, why don't more nonprofits take advantage of this free talent? Does it have to do with the volunteers not meeting expectations, or is it more about the internal workings of the nonprofit?

The answer, of course, is not simple at all. The research offers a complex array of factors that affect whether nonprofits engage with pro bono volunteers and if they do, how successful that engagement is.

The good news is that the nonprofits surveyed were overwhelmingly positive about the work that their volunteers did. Frankly, we are surprised to see how high the marks were. We so frequently hear that "pro bono is not worth the time and trouble," so it was nice to see that the research says otherwise. More than 90% of respondents who have used pro bono volunteers in the past said they would use them again. Clearly it is worth the time and trouble.

Yes, engaging a pro bono volunteer requires an investment of time. Yes, sometimes you run into trouble. The research pinpoints not only where the challenges lie but also suggests solutions in the hope that nonprofits and the volunteers they work with can reduce the friction and make the experience even better.

We hope that the findings are widely distributed so we can spread the word to nonprofits that pro bono is worth the time and trouble. Only then can this valuable resource fulfill its promise to increase nonprofit capacity and effectiveness.

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October 2015

About LBG Associates

LBG Associates is a woman-owned consulting firm focused on designing, implementing, and managing social responsibility and employee engagement programs and initiatives. Founded in 1993 by Dr. Linda Gornitsky, LBG Associates is committed to providing clients with creative and innovative solutions in a personal, professional, cost-effective, and timely manner.

LBG Associates drives social change through:
- Advice to help companies develop strategic, innovative programs that help communities become better places to live and work
- Implementation of strategies, programs, policies, and procedures, especially for companies with limited time and/or expertise
- Research on cutting-edge issues, groundbreaking trends, "best practices," and pressing social needs and concerns
- Training that equips practitioners with the knowledge and skills to become "strategic thinkers" and to grow and advance in the field of corporate community involvement

Advice, implementation, research, and training represent LBG Associates' philosophy about advancing socially responsible business practices. Although steeped in research and scientific methodologies, the firm's approach to corporate community involvement is more of an art than science, more creative than formulaic.

Specific Services Provided

In response to clients' needs, LBG Associates' services include the design, implementation, management, and evaluation of entire community outreach/citizenship programs. The firm helps clients establish and maintain images as good corporate citizens and socially responsible companies by offering custom-tailored services in the following areas:
- Foundation and corporate giving
- Employee engagement (giving and volunteerism)
- Strategic relationship development
- Strategic communications development
- Special events planning and sponsorships
- Research and benchmarking capabilities
- Program evaluation
- Training and staff development

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About LBG Research Institute

LBG Research Institute was founded in 2006 by Dr. Linda B. Gornitsky, a leading consultant in corporate philanthropy and community involvement. The Institute has been serving the profession as a source of public and client-driven research, most notably in the areas of workplace giving, employee engagement and corporate philanthropy in today's challenging economy.

Among the Institute's programs is the Thought Leader Forum, an invitation-only gathering of corporate citizenship leaders who meet to discuss the "big ideas" in citizenship today.

Research reports published by the Institute include:
- Workplace Giving Works: Make It Work for You
- Motivating Volunteering in Tough Times (with LBG Associates)
- Corporate Giving in the New Economy

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Dr. Gornitsky is president and founder of LBG Associates, a consulting firm that specializes in the development of strategic corporate citizenship and employee engagement programs, benchmarking, community attitude and evaluation studies, image-building/communications campaigns and efficient management practices.

Prior to establishing LBG Associates in 1993, Dr. Gornitsky developed and managed strategic contributions programs for Citibank and Pfizer.

Dr. Gornitsky publishes on various aspects of corporate citizenship and has completed over 12 groundbreaking studies on subjects such as volunteerism, the environment, disaster relief and diversity. The most recent ones are on global employee engagement (2014) and the building blocks of a successful volunteer program (2012).

She is an adjunct professor at NYU and was a faculty member at the Center for Corporate Citizenship at Boston College. She was a member of the faculty of the Points of Light Corporate Institute and an evaluator for the Civic 50. She is a frequent speaker at conferences and organized a conference on global corporate citizenship.

Dr. Gornitsky is on the boards of Autism360, Jewish Family Service and UJF in Stamford, CT and is president of LBG Research Institute. She was honored for her commitment to her local community in 2007.

She earned her Ph.D. in Environmental Psychology at City University of New York and holds a Master of Philosophy, Master of Arts and Bachelor of Science degrees, all in psychology.

Donna Devaul, MPPM, Vice President of Research, LBG Associates and Executive Director, LBG Research Institute

Donna Devaul is vice president of research for LBG Associates. In this role, Ms. Devaul has conducted research for clients on all aspects of corporate community involvement, including workplace giving, employee volunteerism, corporate giving and more. She is the author of numerous research studies, including "Global Employee Engagement: Challenges and Solutions," "Secrets to Creating High-Impact Strategic Partnerships," "Corporate Giving in the New Economy" and "Workplace Giving Works! Make It Work for You." In addition to her position at LBG Associates, Ms. Devaul is Executive Director of LBG Research Institute, where she is responsible for membership, marketing, research and administration.

Previously, Ms. Devaul was director of marketing for Irving Levin Associates, Inc., a privately held newsletter publisher in Norwalk, CT. There she was responsible for the marketing strategy and execution of all marketing programs, and the daily operations of the firm. Prior to joining Levin in 2001, she held marketing positions at Simba Information, a Primedia company, and Money magazine, a Time Inc. publication. Her editorial credits include managing editor of Catalog Age magazine, where she won regional and national editing awards. While at Levin, she won marketing awards from both The Newsletter on Newsletters and the Specialized Information Publishers Foundation.

Ms. Devaul is a magna cum laude graduate of Hamilton College and holds a Masters in Public and Private Management from Yale University.

Executive Summary

The Committee Encouraging Corporate Philanthropy's 2014 *Giving in Numbers* report called pro bono service[1] the fastest-growing employee engagement program. But with all this growth, will there be sufficient demand for pro bono services to meet the increasing supply of volunteers? To run a successful pro bono program, with high, enthusiastic participation and stellar results, the corporate employee engagement team has to understand the challenges nonprofits face when taking on a volunteer—challenges that might keep them from exploring these valuable resources.

With both third-party help and do-it-yourself resources available to them to successfully solicit and manage pro bono services, what are the issues keeping nonprofits from using pro bono help? What can corporations do to help their partners overcome these obstacles? Ultimately, without a clear understanding of the challenges and solutions from the nonprofit point of view, pro bono's growth will stall and its promise will not be fulfilled.

The goal of this research was to examine the nonprofits' view of pro bono challenges and identify solutions that help both the nonprofit experience and the corporations that want to support them.

> ### How the Survey Defined Pro Bono
>
> *Pro bono volunteerism is the donation of professional services that utilize the professional and technical skills of the volunteer and for which the recipient nonprofit would otherwise have to pay. It gives nonprofits access to the business skills and experience they need to develop and implement sound business strategies, increase their capabilities and improve their organizational infrastructure.*

Methodology

An online survey was designed with the assistance of the study sponsors that asked questions about the nonprofit experience in all phases of a pro bono project. An incentive was offered for responding. Six nonprofits were drawn at random from all completed surveys to receive a $250 donation from The Macquarie Group and LBG Research Institute.

> ### The Rating Scale:
>
> 1 = Extremely Challenging
> 2 = Challenging
> 3 = Somewhat Challenging
> 4 = Not at all Challenging

The online survey was sent by email during the summer of 2015 to lists provided by the study sponsors and partners as well as a list of nonprofits maintained by LBG Associates. Additionally, select nonprofits were interviewed by phone to probe in-depth on their responses to the online survey. Phone interviews were conducted with a cross-section of nonprofits in the U.S., Canada, the United Kingdom and Australia.

The survey questions sought to determine:
- What keeps a nonprofit from embracing pro bono as a solution to a management problem
- What nonprofits consider the biggest challenges working with pro bono volunteers
- The solutions nonprofits have employed to address these challenges
- How successful the pro bono projects have actually been

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[1] While there are differences between skills-based volunteering and corporate pro bono volunteering, we chose to use the term pro bono for simplicity in the research and in this report. Nonprofits used their experiences with both skills-based and pro bono services to respond to the survey. In general, skills-based volunteering is when the volunteer uses any professional skill to complete a volunteer project, while pro bono volunteering is when the volunteer uses his or her workplace skills to complete a project. Furthermore, these projects are usually focused on infrastructure or capacity building.

Use of Pro Bono Volunteers

Of the 1,436 respondents to the survey, 81% or 1,164 of them have used the professional and/or technical skills of volunteers. The majority of nonprofit organizations (88%) surveyed said they turned to pro bono help mainly when a need arose and there was no funding available to address it.

The respondents in this survey gained access to pro bono services mainly through their organizational networks. Below is where respondents have found pro bono volunteers:

- 53% used a Board member's network to find a volunteer
- 46% used a Board member
- 45% found a volunteer within its existing volunteer network
- 45% engaged a volunteer from a corporation with which the nonprofit has a relationship
- 43% found a volunteer by tapping the personal network of someone in the nonprofit

By far, the majority of pro bono projects represented in the study focused on the external relations of the nonprofit:

- 61% used pro bono volunteers for marketing and branding projects
- 41% used them for public relations or communications
- 40% used them for fundraising

Phases of a Pro Bono Engagement

In order to dig deeper into where the sticking points of a pro bono engagement lay, the typical pro bono engagement was divided into phases and asked respondents to rate the tasks involved in each phase based on the rating scale shown on the previous page.

Phase	Rating by Experienced Nonprofits	Rating by Inexperienced Nonprofits
Scope and Preparation	3.07	2.86
Outreach and Securement of Services	3.00	2.69
Volunteer Management	3.19	3.03
Implementation of the Deliverable	2.97	2.72

The table at right shows how both nonprofits that have and have not used pro bono rate the difficulty of each phase.

The respondent group that has not used pro bono consistently rated the phases and their associated tasks as more challenging than the group that has used pro bono before, showing that perception is not the reality. Interviews with select respondents in that group also revealed a prevailing attitude that pro bono help is not worth the time and trouble. Many said they felt it was better to fundraise and pay for the services they needed. Some cited anecdotal evidence from colleagues to support their position and some just had a gut feeling that this was true.

Does Pro Bono Work?

According to the study respondents—yes. Multiple survey questions asked that in different ways:

- 95% strongly agreed, agreed or somewhat agreed that their target issue was addressed
- 82% of projects undertaken by the respondents in the past three years were completed and the deliverable implemented
- 97% said the deliverable was at least somewhat useful; more than half said it was very useful or extremely useful
- 75% said the end product was a good return on their investment of time and resources

Challenges and Solutions

The survey highlighted the challenges nonprofits face when taking on a pro bono volunteer. It also illuminated the solutions they have found as well as some they wished existed.

Challenges	Solutions
Getting Started	• Be prepared by using the resources publicly available that walk nonprofits through the pro bono process • Start with a small, discrete project • Ask your network for help and advice
Finding the Right Help	• Interview candidates as if it were a paid position • Find local volunteers that can be interviewed in person • Get references, preferably from other nonprofits for which the volunteer has worked • If working with a project team, vet the team leader • Don't be afraid to say no when the fit is not right • Check that the volunteer has an affinity with the mission
Finding the Time	• Assign a point person on staff to manage the project and the volunteer • Overestimate the staff time needed and build that into the timeline • Orient the volunteer upfront • Establish roles and responsibilities for staff • Use pro bono volunteers for regular work flow or client work
Keeping the Project on Track	• Implement regularly scheduled check-ins and do not cancel them • Have a contingency plan in the event of problems • Ask the volunteer to commit to a realistic number of hours per week • Look for retirees to provide services
Funding the Implementation	• Include implementation assistance in the statement of work • Ask for an implementation grant if working with a corporation • Investigate potential funding requirements prior to beginning the project • Fundraise for implementation before the project is complete

What Nonprofits Need to Succeed

The nonprofits surveyed said that the following would be helpful:

A comprehensive list of resources. A surprising percentage of respondents—at least 70% of both experienced and inexperienced with pro bono—said they were not aware of the free tools and resources available to them from a number of intermediaries, such as Taproot, Common Impact and Volunteer Canada. A comprehensive list would save them time finding the information they need.

A one-stop collaborative website of online resources. Instead of visiting multiple sites for information, the nonprofits would like to see everyone with educational resources on using pro bono collaborate on a single site.

More templates and tools. There are templates and tools for many aspects of pro bono but there could be more. Some of the tools mentioned included:

- Checklist for vetting potential volunteers
- Sample statement of work
- Evaluation guidelines or tool
- Onboarding guide
- Sample timelines and milestones
- Training module for pro bono volunteers on how to work with a nonprofit

Volunteer matching site/volunteer database searchable by nonprofits. While nonprofits appreciate the opportunity to post projects and have potential volunteers apply for those projects, what they asked for in the study was the reverse. They would like to have a database of potential volunteers that they can search to find the skill sets and other qualifiers they are looking for.

Community of users of pro bono. A number of respondents said they wished they could reach out to nonprofits that have used pro bono volunteers successfully that could act as mentors for them as they move through the process. While case studies are great sources of information, they want to be able to communicate with more experienced nonprofits.

How Corporations Can Help

Corporations can be part of the solutions to the challenges that nonprofits face. As a provider of pro bono volunteers, a company can dramatically impact the success of the project by taking a holistic view and giving all the support it can before, during and after the project.

Corporations can:

Challenges	Solutions
Getting Started	• Provide educational resources • Suggest a small, discrete project as a start
Finding the Right Help	• Provide candidates for the nonprofit to choose from • Assess candidates' affinity to the nonprofit's mission
Finding the Time	• Make sure the volunteer is sensitive to the issue and not causing additional work or asking for immediate feedback or turnaround on project work • Provide additional help, such as administrative help or funds for a temp
Keeping the Project on Track	• Allow employees to attend meetings or work on the project during the workday without repercussions
Funding the Implementation	• Include a grant or additional pro bono help for implementation

Respondent Demographics

Nonprofits of all sizes, locations and cause areas were represented in the respondent group. The majority were located in North America:

- 82% were based in the United States
- 11% in Canada
- 0.2% in Mexico

The rest were based outside North America, with the largest pockets of respondents from Europe and Asia (about 2% each). Africa and Australia/New Zealand represented about 1.5% of respondents each.

The respondents worked in a range of cause areas:

- 21% were education and youth nonprofits
- 14% were in human services
- 10% worked in arts, culture or humanities
- 9% in housing and homelessness

The majority of respondents worked in the headquarters office of the nonprofit (89%). The remaining 11% worked in a local or satellite office.

A plurality of respondents was small nonprofits in terms of budget:

- 45% of respondents had a budget under $1 million
- 18% had an organizational budget between $1 million and $2 million
- 37% had a budget of $2 million or more

Introduction

Corporate pro bono programs have been growing quickly over the past few years. The Billion+ Change movement has produced pro bono[1] volunteer commitments from more than 500 companies in just two years. The Committee Encouraging Corporate Philanthropy's 2014 *Giving in Numbers* report also bears this out, calling pro bono service the fastest-growing employee engagement program.

But with all this growth, will there be sufficient demand for pro bono services to meet the increasing supply of volunteers? The concern is that there might be a shortfall unless we better understand what keeps nonprofits from accessing these services. To run a successful pro bono program, with high, enthusiastic participation and stellar results, the corporate employee engagement team has to understand the nonprofit point of view.

There has been far less little research on pro bono from the nonprofit point of view than from the corporate point of view. The one study that did look at the nonprofit experience, conducted by LBG Associates in 2011, focused on "readiness" and showed that most nonprofits were not "ready" to utilize pro bono services. Readiness is just the first step to a pro bono partnership. A nonprofit also has to be willing and able to enter into a partnership. While readiness has most likely increased since the last study, has demand for pro bono increased with it? If not, what is stopping nonprofits of all sizes from embracing pro bono?

> ## How the Survey Defined Pro Bono
>
> *Pro bono volunteerism is the donation of professional services that utilize the professional and technical skills of the volunteer and for which the recipient nonprofit would otherwise have to pay. It gives nonprofits access to the business skills and experience they need to develop and implement sound business strategies, increase their capabilities and improve their organizational infrastructure.*

With both third-party help and do-it-yourself resources available to them to successfully solicit and manage pro bono services, what are the issues keeping nonprofits from using pro bono help? What can corporations do to help their partners overcome these obstacles? Ultimately, without a clear understanding of the challenges and solutions from the nonprofit point of view, pro bono's growth will stall and its promise will not be fulfilled.

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Methodology

An online survey was designed with the assistance of the study sponsors that asked questions about the nonprofit experience in all phases of a pro bono project. An incentive was offered for responding. Six nonprofits were drawn at random from all completed surveys to receive a $250 donation from The Macquarie Group Foundation and LBG Research Institute.

The online survey was sent by email during the summer of 2015 to lists provided by the study sponsors and partners as well as a list of nonprofits maintained by LBG Associates of nonprofits that participated in the 2011 survey. LBG Associates and the partners sent 15,298 emails that resulted in 1,436 completed surveys for a response rate of 9.3%. Respondents represented nonprofits large and small and from across the globe. (See Demographic Tables beginning on page 52.)

The LBG Associates' list, plus those of Taproot, Common Impact, Points of Light and Volunteer Canada comprised the majority of both the survey sample and respondent base. This presents a potential problem of bias, as the sample may be comprised of nonprofits that have shown some interest in pro bono. Thus it might be argued

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1 While there are differences between skills-based volunteering and corporate pro bono volunteering, we chose to use the term pro bono for simplicity in the research and in this report. Nonprofits used their experiences with both skills-based and pro bono services to respond to the survey. In general, skills-based volunteering is when the volunteer uses any professional skill to complete a volunteer project, while pro bono volunteering is when the volunteer uses his or her workplace skills to complete a project. Furthermore, these projects are usually focused on infrastructure or capacity building.

that the overall percentage of respondents who have used pro bono may not be representative of a purely random sample of nonprofits. We do not feel that this is an issue because both respondents who have used pro bono and those who have not are represented in the study.

Interestingly, far fewer of the respondents actually used one of the intermediaries that supplied these lists than one might have expected, further enforcing confidence that the results represent experiences using volunteers from different sources.

Additionally, select nonprofits were interviewed by phone to probe in-depth on their responses to the online survey. Phone interviews were conducted with a cross-section of nonprofits in the U.S., Canada, the United Kingdom and Australia.

The survey questions sought to determine:
- What keeps a nonprofit from embracing pro bono as a solution to a management problem
- What nonprofits consider the biggest challenges working with pro bono volunteers
- The solutions nonprofits have employed to address these challenges
- How successful the pro bono projects have actually been

In the analysis, the data were cross-tabbed on different demographics:
- Small, medium and large nonprofits
- Location
- U.S. vs. Canada
- U.S. and Canada vs. rest of the world
- Nonprofit headquarters vs. local/satellite offices

Surprisingly, few differences emerged from this analysis. Where significant differences occurred, they are noted in the "Global Notes" boxes throughout the report. A discussion of the impact of the size of the nonprofit on results appears on page 48.

SECTION 1: Respondents Who Have Used Pro Bono Volunteers

Introduction

Of the 1,436 respondents to the survey, 81% or 1,164 of them have used the professional and/or technical skills of volunteers. Because the sample is partially drawn from emails sent by pro bono intermediaries, this percentage is likely higher than would be observed in a random sample of nonprofits. This skew allows us to explore the nonprofit experience with pro bono more deeply, however, as we have more than 1,000 responses representing thousands of pro bono projects from which to learn.
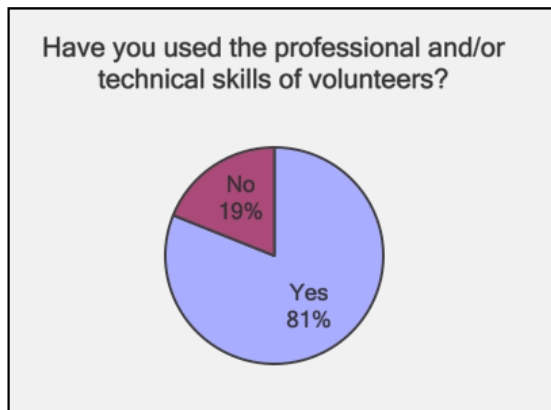
Have you used the professional and/or technical skills of volunteers?

No 19%
Yes 81%

Why Did They Use Pro Bono?

Nonprofit organizations surveyed said they turned to pro bono help mainly when a need arose and there was no funding available to address it. The lack of funds could be defined as no budget available to hire a consultant or other professional service provider, or no budget to hire an additional staff member so that the project could be done in-house. Either way, the eternal problem of nonprofits—no money—is at the root of most pro bono work.

In some cases, the motivation is external—someone outside the organization knocks on the door and offers help. In this study, funders and individuals approached nonprofits at nearly the same rate.

What motivated you to undertake a pro bono volunteer project? (Select all that apply.)	
Answer Options	Response Percent
We had a specific need that we needed to address and had insufficient funding to do so	88.0%
Leadership suggested we get a volunteer to address a need	31.0%
Staff suggested we get a volunteer to address a need	23.4%
We were approached by a major funder	13.3%
We were approached by an individual	12.3%
We thought that not providing an opportunity could impact future funding from a corporate partner	8.6%
We lacked the skills internally	1.2%
Other (please specify)	7.4%

Where Do Volunteers Come From?

Pro bono volunteers can come from many sources—organizational and personal networks, intermediaries, web-based volunteer matching services, and other sources. The respondents in this survey gained access to pro bono services mainly through their organizational networks. Someone in a Board member's network provided services in 53% of cases and a Board member provided the services in 46% of cases. The existing volunteer network provided the volunteer in about 45% of cases and a corporation with which the nonprofit has a relationship supplied a volunteer in 45% of projects. The personal network of someone in the nonprofit was responsible for supplying a volunteer in 43% of cases. Twenty-eight percent of respondents found a qualified volunteer through a corporation with which they had no prior relationship.

Intermediaries, such as Taproot Foundation, Points of Light, Common Impact, Volunteer Match and Bénévoles d'affaires in Canada, are in the business of matching nonprofits with skilled and/or traditional volunteers. Nearly 42% of respondents used one or more of these services to find a skilled volunteer. Online services that allow nonprofits to post projects in search of a volunteer, such as Sparked.com, Catchafire and Taproot Plus were used by 9% of respondents.

Global Note

Nonprofits outside the U.S. and Canada overwhelmingly sourced pro bono volunteers from corporations with which they have a relationship (83%). Very few (14%) used an intermediary, although nonprofit headquarters were far more likely to tap an intermediary than a satellite office. Satellite offices were more likely than headquarters to use a Board member than any other source of pro bono volunteers.

How has your organization gained access to these volunteers/services? (Select all that apply.)	
Answer Options	Response Percent
Board Contact	52.8%
Board member provided the services	46.0%
Existing volunteer network	44.9%
A corporation with which we have an established relationship	44.5%
Personal network	43.2%
Intermediary organization (i.e., Taproot, Points of Light, Common Impact, Bénévoles d'affaires)	41.7%
Individuals from a corporation with which we do not have a relationship	28.0%
Individual matching service (i.e., Sparked, Catchafire)	9.0%
University	3.0%
Organizational outreach	1.7%
Other (please specify)	3.9%

What Do the Volunteers Do?

By far, the majority of pro bono projects represented in the study focused on the external relations of the nonprofit. Marketing and branding projects represented the lion's share of projects for the survey respondents, at nearly 61%. More than 41% of respondents used volunteers for public relations or communications. About 40% said they used the skills of volunteers for fundraising.

Projects in these areas can be small, discrete projects, such as designing a logo, writing a brochure, creating an event invitation, or writing and submitting press releases. They can also be larger projects, such as a competitive analysis or a full branding or marketing campaign. They might even include chairing, organizing or running a fundraising gala or a capital campaign.

In what area(s) did you engage pro bono volunteers? (If you have had multiple pro bono engagements, please check all that apply.)	
Answer Options	Response Percent
Marketing/Branding	60.8%
PR/Communications	41.5%
Fundraising	40.4%
Technology	40.1%
Strategic Planning/Management	39.2%
Human Resources and Leadership Development	26.8%
Financial Management	22.8%
Board Development	21.0%
Operations	18.1%
Accounting/Audit	16.1%
Legal	11.4%
Tax Advice/Preparation	9.7%
Risk Management	9.4%
Data Analytics	1.4%
Research	1.4%
Mentoring/Teaching	1.3%
Event Planning	1.0%
Administrative Assistance	0.5%
Government Relations	0.3%
Other (please specify)	8.3%

Pro bono volunteers have helped with a substantial amount of internal projects as well. Technology projects and strategic planning and management projects were performed for about 40% of respondents. These types of projects may be more long-term than short, particularly strategic planning projects. A technology project may be as simple as setting up new computers, or as technical as designing a database solution. The intensity of these longer-term projects or the specialized skills required may account for their relatively lower frequency.
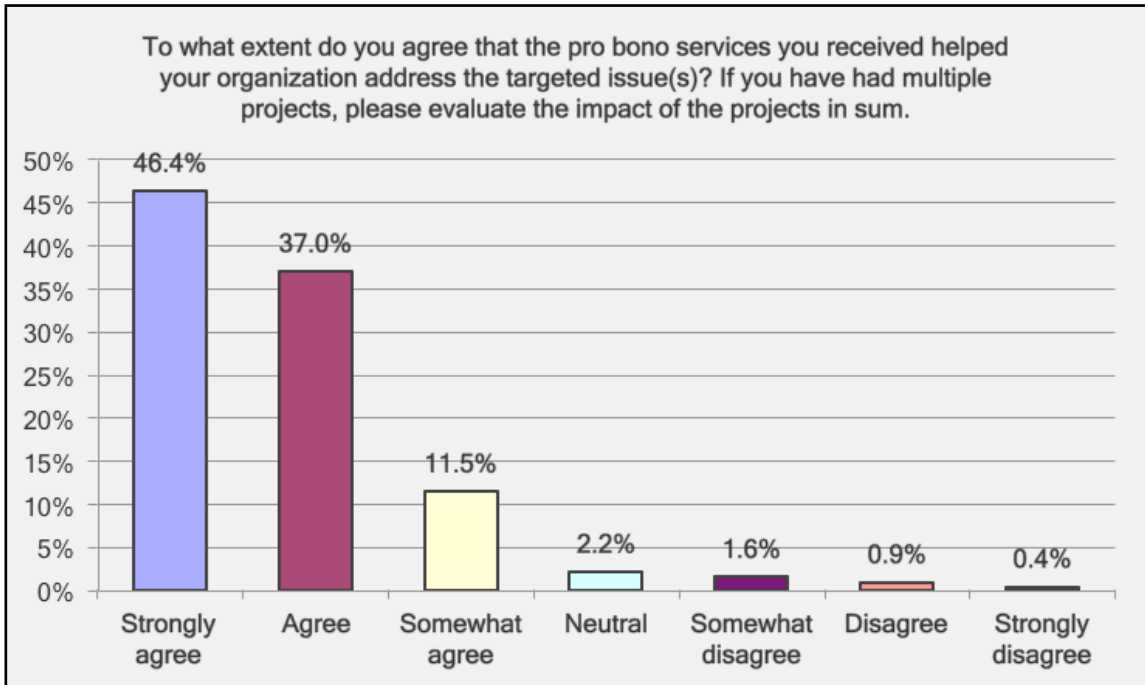
Does Pro Bono Work?

According to the study respondents, pro bono services successfully addressed their target issue a majority of the time. More than 46% said they strongly agree that pro bono worked and 37% said they agree. Nearly 12% said they somewhat agree, leaving only 5% neutral or negative about the experience. And contrary to anecdotal evidence, it is relatively unusual for a pro bono project to either not be completed or its deliverable not implemented. In this survey sample, about 82% of projects undertaken in the past three years resulted in a completed and implemented deliverable.

Global Note

98% of non-North American nonprofits said that the pro bono project helped them address their target issue to some degree.

To what extent do you agree that the pro bono services you received helped your organization address the targeted issue(s)? If you have had multiple projects, please evaluate the impact of the projects in sum.

Strongly agree	46.4%	
Agree	37.0%	
Somewhat agree	11.5%	
Neutral	2.2%	
Somewhat disagree	1.6%	
Disagree	0.9%	
Strongly disagree	0.4%	

Of the pro bono projects that you completed in the last 3 years, how many were:	
Answer Options	Response Percent
Successfully completed by the volunteer and the deliverable/recommendations were implemented	81.9%
Successfully completed by the volunteer but the deliverable/recommendations were not implemented	8.1%
Completed by the volunteer but the deliverables/recommendations were not useful	4.8%
The project was not completed by the volunteer	5.2%

KEY FINDINGS

- 81% of respondents have used pro bono
- 88% did so because they had a need but no funding to address it
- 53% used their Board's network to find a volunteer
- 61% hosted a marketing or branding project
- 46% strongly agreed that pro bono successfully addressed their need
- 82% of projects were completed and the deliverable implemented

Phases of a Pro Bono Engagement

In order to dig deeper into where the sticking points of a pro bono engagement lay, we divided the typical pro bono engagement into five phases. These five phases also follow the steps of a pro bono project used by intermediaries such as Taproot and Common Impact in their online tools for nonprofits.

The five phases are:

1. Scope and Preparation
2. Outreach and Securement of Services
3. Volunteer Management
4. Implementation of the Deliverable
5. Evaluation of the Engagement

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The Rating Scale:

1 = Extremely Challenging
2 = Challenging
3 = Somewhat Challenging
4 = Not at all Challenging

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Survey respondents were asked to rate how challenging common tasks were for each phase. The responses were assigned a number according to the scale in the box at right so that each task would have a rating average.

Following the rating question, the respondents were asked what they would do differently in that phase and had the opportunity to comment on what might have made that phase go more smoothly. In this way, the survey sought to identify the top challenges and solutions in each phase of a pro bono engagement.

Phase 1: Scope and Preparation

The scope and preparation phase covers the internal conversations at the nonprofit before a potential pro bono volunteer is sought. The statements below represent the steps in approximately sequential order, although some may happen concurrently and some may be skipped altogether.

In the table below, "Extremely Challenging" was assigned a rating of 1, while "Not at all Challenging" was assigned a 4. The lower the rating average, then, the more challenging that step or task was rated. The three most challenging tasks are shown in red below, while the three least challenging are shown in blue.

> **Overall Rating for Scope and Preparation Phase: 3.07**

Please rate the difficulty of the following aspects of scoping and preparing for a pro bono project. If you have done more than one pro bono project, please refer to the most recent one in answering these questions.						
Answer Options	Extremely Challenging	Challenging	Somewhat Challenging	Not at all Challenging	N/A	Rating Average
Conducting a needs assessment to identify the issues that need to be addressed	4.6%	21.1%	34.3%	34.2%	5.7%	3.04
Selecting the issue that the organization wants to address	1.6%	13.2%	25.3%	57.2%	2.6%	3.42
Identifying a project needs statement	1.5%	11.9%	34.7%	42.2%	9.6%	3.30
Developing the project objectives	1.3%	14.2%	42.0%	39.0%	3.5%	3.23
Defining the project's scope	3.7%	22.0%	39.0%	32.5%	2.9%	3.03
Preparing a project proposal and checklist	3.5%	16.3%	36.2%	33.2%	10.8%	3.11
Gaining approval/buy-in from leadership	2.2%	8.4%	21.9%	63.7%	3.8%	3.53
Gaining approval/buy-in from staff	2.8%	9.4%	25.4%	54.6%	7.9%	3.43
Estimating the staff time required for the project	7.4%	24.1%	45.1%	18.0%	5.3%	2.78
Preparing a reasonable timeline for the project	4.7%	23.9%	44.1%	24.6%	2.8%	2.91
Identifying sufficient funds to support the project	18.6%	23.2%	27.6%	15.9%	14.7%	2.48
Creating project milestones	2.6%	19.4%	41.9%	28.9%	7.3%	3.05
Developing quantitative and qualitative evaluation metrics to assess short- and long-term success	12.5%	26.3%	33.5%	16.9%	10.8%	2.61
OVERALL						**3.07**

What Was Challenging…

The most challenging tasks were related to time, money and evaluation—frequent pain points for many nonprofits. The most difficult is identifying sufficient funds to support the project, which isn't surprising since money is always tight. When embarking on a pro bono project, it is wise to know where the money for implementation will come from once the project is completed. It may be a small amount, such as printing costs for the new brochure the volunteer designs, or a large amount, such as installing the new database software the volunteer designs or recommends. That has to be done upfront or the time and effort spent to get to the deliverable is wasted.

Almost as challenging as finding funds was developing quantitative and qualitative metrics to evaluate the short- and long-term success of the project. The survey shows that nearly 43% of respondents did not evaluate the success of the pro bono project.

Estimating staff time for the project was the third most challenging task. The staff time required is different for each type of project and highly dependent on the pro bono volunteer's work style. Some projects by nature may need more staff supervision and some volunteers may need more supervision. Nonprofits may get better at estimating staff time required as they host more pro bono projects.

…And What Was Not

Apparently it was not particularly challenging to get buy-in for a pro bono engagement from both leadership and staff at the nonprofit. Both tasks were rated between "somewhat challenging" and "not at all challenging." In both cases the majority of respondents rated these tasks as "not at all challenging." A majority also rated "selecting the issue the organization wants to address" as not at all challenging. These results together suggest that most nonprofits' staff and leadership can agree on the most pressing need of the organization and that pro bono is a possible solution to the problem.

What Would They Do Differently?

Since estimating staff time required for the project was one of the biggest challenges, it is not surprising that the top change respondents would make for the next project is to overestimate the time required. Forty-three percent, a plurality, said they would do this next time. More than 31% said they would do more work on the project's goals, objectives, and scope before beginning the engagement.

Thirty-one percent also said they would get help on the evaluation side, which was another of the more challenging aspects of this phase. About 21% said they would do a little more research by including more individuals in the preparation process, contact other nonprofits about their experiences, and get more feedback from the staff before beginning the project. Only 14% said they would not do anything differently.

The respondents noted a number of other things they would do differently in the open-ended section of the question. Most of them focused on having clarity upfront, both within the organization and with the volunteer. Some focused on readying the volunteer for the project, and others focused on having contingency plans if the project starts to derail.

Respondents said:

On clarity:
- Making sure there is clarity from the external side on project deliverables (sometimes terminology, lack of understanding of the big picture, and a misalignment of goals can easily derail a project from the start)
- Be more assertive in making sure the pro bono volunteer listens to what is needed rather than making assumptions based on his/her past experience—often similar, but more often a near miss

On preparing the volunteer:
- Push harder to have volunteers visit our operations and learn more intimately about our services
- Try to provide additional background context before the start of the project in order for the project to be more efficient and productive

On contingency plans:
- Reference check the volunteer and have a contingency plan if they do not complete the work
- Heed warning signs that the volunteer we engaged was not fully committed and look for another volunteer

Looking back on the scope and preparation phase, what would you do differently next time that would ease the challenges you faced? (Select all that apply.)	
Answer Options	Response Percent
Overestimate the staff time required for the project	43.3%
Take more time to outline the goals and objectives of the project	34.7%
Be more specific in defining the project scope	32.4%
Develop a more detailed project scope and timeline	31.9%
Get help to develop quantitative and qualitative evaluation metrics to assess short- and long-term success	31.1%
Include more individuals in the preparation process	21.6%
Contact other nonprofits about their experiences	21.2%
Take more time to get feedback from the staff before beginning the project	20.5%
Take more time to identify the right issue to be addressed	19.5%
I would not do anything differently	14.0%
Take more time to get feedback from leadership before beginning the project	13.1%
Take more time to understand the needs of the organization	12.3%
Other	11.8%

KEY FINDINGS

- Most challenging: Estimating staff time needed for the project
- Least challenging: Gaining approval from leadership
- Do differently: Overestimate staff time
- 14% would not do anything differently

Phase 2: Outreach and Securement of Services

In the outreach and securement of services phase, the nonprofit seeks an appropriate volunteer for the project it has decided to pursue. The search might be done through its network or an intermediary. Once a potential volunteer or volunteers are identified, the nonprofit has to assess the candidate or candidates for fit in terms of skill set and commitment to the project. When using an intermediary, sometimes the nonprofit is not given a choice, but assigned a team.

Once the volunteer is selected or assigned, the nonprofit and the volunteer have to make sure they are on the same page in terms of the scope and goal of the assignment, including the time commitment on both sides and the staff and resources available to the volunteer.

In the table below, "Extremely Challenging" was assigned a rating of 1, while "Not at all Challenging" was assigned a 4. The lower the rating average, then, the more challenging that step or task was rated. The three most challenging tasks are shown in red below, while the three least challenging are shown in blue.

What Was Challenging…

This phase is all about finding the right person for the pro bono job. The two most challenging tasks, according to the survey, were locating sources of pro bono help and then selecting the right person from those sources. Though some nonprofits were approached by a funder or an individual about a project, most proactively sought a volunteer, using organizational and personal networks or meeting with an intermediary.

Please rate the difficulty of the following aspects of the outreach and securement of services phase of a pro bono project. If you have done more than one pro bono project, please refer to the most recent one in answering these questions.

Answer Options	Extremely Challenging	Challenging	Somewhat Challenging	Not at all Challenging	N/A	Rating Average
Locating sources of pro bono help	10.1%	24.6%	34.0%	26.8%	4.5%	2.81
Identifying the right individual to provide the necessary support	13.8%	28.5%	31.2%	20.0%	6.5%	2.61
Communicating the project to potential sources of volunteers	5.0%	21.4%	33.1%	30.3%	10.2%	2.99
Defining the skill set(s) required for the project	3.6%	17.2%	37.1%	36.0%	6.2%	3.12
Selecting the right internal staff member(s) for the project	3.3%	12.3%	24.6%	51.4%	8.4%	3.35
Interviewing/selecting the right volunteer(s) for the project	5.2%	16.4%	32.9%	30.9%	14.6%	3.05
Making sure that the volunteer understands the time commitment involved in the project	6.8%	20.6%	33.9%	30.0%	8.7%	2.95
Agreeing on the scope of the project	2.6%	22.2%	36.5%	34.4%	4.3%	3.07
Agreeing on a viable statement of work	2.6%	16.9%	36.9%	29.7%	13.9%	3.09
OVERALL						3.00

The "right" person for the job is about more than their skill set. The respondents rated "making sure that the volunteer understands the time commitment involved in the project" as more challenging than identifying the right skill set for the project. Commitment to the project has to be determined through interviews with potential volunteers and not the resumé of that person.

…And What Was Not

Many of the average ratings of the tasks in the outreach and securement of services phase are clustered around a "3," or "somewhat challenging." The "easiest" task was selecting the right internal staff member for the project. Large nonprofits may find this easier than small ones if they have multiple staff members in each function. A small nonprofit with a few generalists may have a more difficult time deciding who the staff lead should be. Because managing a pro bono volunteer is time-consuming, the internal staff person has to have a relevant skill or responsibility as well as the time.

What Would They Do Differently?

The survey results suggest that nonprofits have learned that it would benefit everyone if they did more upfront work with the staff and the volunteer, making sure that everyone is on the same page. Forty-two percent said they would clarify the roles and responsibilities of the volunteer and 39% said they would do the same for the staff assigned to the project. The results also suggest that the nonprofit should make sure the volunteer truly understands the time involved and can make that commitment. Forty-one percent of respondents noted that as something they would do differently.

Almost 35% of respondents noted that they would make sure that the volunteer understands the culture of the organization. Nonprofits function differently from for-profit corporations, not just at a different pace but with a different sensibility. Country culture is important to understand, too, when the volunteer is from a different country. Corporations with global volunteer programs are sensitive to this and prepare their volunteers before they go.

Nonprofit employees are believers in the mission of the organization. Twenty-three percent of respondents noted that they wished they evaluated the emotional commitment of the volunteer as well. A belief in the mission will produce a more committed volunteer and potentially a better outcome.

In the open-ended comments, a number of respondents said that it is important to nail down the details of the engagement upfront. The more clearly the roles and responsibilities are laid out—including time estimates—the better. Transferring knowledge to the volunteer in the beginning and from the volunteer at the end is also important. Third, a few suggested turning the current matching of volunteers to projects on its end. Instead of potential volunteers searching for projects, such as those posted on Catchafire or Taproot Plus, these nonprofits want to search a database of volunteers for candidates instead of waiting for candidates to select them. This could work for finding local or virtual volunteers, but might not work well for global volunteering.

Looking back on the outreach and securement of services phase, what would you do differently next time that would ease the challenges you faced? (Select all that apply.)	
Answer Options	Response Percent
Clarify roles and responsibilities of volunteer(s)	42.1%
Evaluate the time commitment of the volunteers	41.4%
Clarify roles and responsibilities of staff	38.7%
Make sure the volunteer understands the culture of the organization	34.5%
Research more sources of pro bono help	26.1%
Evaluate the emotional commitment of the volunteers	23.0%
I would not do anything differently	22.7%
Interview more volunteers	15.4%
Use an intermediary/matching service (if you haven't used one before)	6.5%
Use a different intermediary/matching service (if you used one in the past)	3.6%
Other	7.6%

Respondents said:

On preparation:
- Greater onboarding of the volunteers prior to the project so that they have full understanding of the nonprofit mission and the specifics of the project
- Setting expectations we all agree on is a key element of the process. Sometimes a volunteer views the project through such a different lens that the initial stage of the project must be re-assessed. Asking good, deep questions upfront without rushing helps this along
- Finding volunteers who can be steadfast to the time commitment continues to be problematic. I would break the project down into smaller segments so that if one volunteer left, another could be drafted to finish the work

On knowledge transfer:
- We are an ethnic senior center, and some volunteers were not familiar with some of the customs/culture
- Ensure there is a transfer of skills or knowledge from the volunteer to someone on staff, as is applicable for the future

On finding volunteers:
- Matching services need to implement stronger evaluation methods for matching volunteers to organizations. It would be wonderful if they could provide a list of volunteers and we could choose, or rank the individuals we think would best match our needs
- I used [a matching service] so it was very easy and the match worked well. Previously trying to find pro bono on our own was time consuming and disappointing

KEY FINDINGS

- Most challenging: Identifying the right volunteer
- Least challenging: Selecting the right internal staff member
- Do differently: Clarify roles and responsibilities of the volunteers
- 23% would not do anything differently

Phase 3: Volunteer Management

Once the prep work is done and the volunteer selected, the organization and the volunteer have to forge a working relationship. From how often they will meet to how information will be exchanged, both sides will have many decisions to make on how best to work together. As they get to know each other, their interaction may get easier or harder, depending on the personalities and work styles of everyone involved.

> **Overall Rating for Volunteer Management Phase:**
>
> **3.19**

In the table below, "Extremely Challenging" was assigned a rating of 1, while "Not at all Challenging" was assigned a 4. The lower the rating average, then, the more challenging that step or task was rated. The three most challenging tasks are shown in red below, while the three least challenging are shown in blue.

Please rate the difficulty of the following aspects of the volunteer management phase of a pro bono project. If you have done more than one pro bono project, please refer to the most recent one in answering these questions.						
Answer Options	Extremely Challenging	Challenging	Somewhat Challenging	Not at all Challenging	N/A	Rating Average
Understanding the volunteer's communications	1.1%	11.3%	34.8%	49.9%	2.9%	3.38
Ability to engage with the volunteer on a regular and timely basis	7.7%	18.0%	38.2%	33.3%	2.7%	3.00
Finding time to manage the volunteer/respond to questions	7.7%	20.5%	40.5%	28.4%	2.9%	2.92
Understanding cultural differences between the organization's staff and the volunteer	3.8%	13.6%	32.9%	39.0%	10.7%	3.20
Accessing the data or resources requested by the volunteer	2.8%	14.6%	33.8%	41.8%	7.0%	3.23
Having the volunteer stay on schedule	8.4%	18.0%	33.3%	36.3%	4.0%	3.02
Having the organization's staff stay on schedule	4.9%	17.0%	37.9%	33.8%	6.4%	3.07
Keeping to the project's original scope	4.1%	15.5%	33.3%	42.9%	4.3%	3.20
Establishing a working relationship between the volunteer and the staff	2.3%	11.7%	27.7%	52.3%	6.0%	3.38
Establishing a working relationship between the volunteer and leadership	2.8%	9.8%	26.6%	53.5%	7.2%	3.41
Providing candid feedback to the volunteer	4.9%	16.6%	30.3%	44.1%	4.1%	3.18
Getting the volunteer to produce quality work	5.2%	12.3%	26.8%	52.2%	3.6%	3.31
Getting the volunteer to finish the project	6.4%	12.4%	25.1%	51.4%	4.8%	3.27
Getting a useful deliverable	6.9%	15.9%	28.6%	43.9%	4.7%	3.15
OVERALL						**3.19**

What Was Challenging…

In the volunteer management phase, most tasks were rated "somewhat challenging" on average, indicating that working with the volunteer is easier than some of the earlier phases. Time is more of a problem than the interaction with the volunteer, according to the table above. The more difficult tasks were finding the time to manage the volunteer and respond to questions. Similarly, the respondents found it somewhat challenging to engage with the volunteer on a regular and timely basis. It isn't clear if that challenge was related to the organization's time constraints or the volunteer's. It might be the volunteer's time that was a problem—the third most challenging task was getting the volunteer to stay on schedule.

…And What Was Not

The majority of respondents said that it was "not at all challenging" to establish a working relationship between the volunteer and both the organizational leadership and the staff. Nor was it hard to understand the volunteer's communications.

Apparently quality was not an issue either. The majority said that it was not at all challenging to get the volunteer to produce quality work. The same was said for getting the volunteer to finish the project.

What They Would Do Differently

Time once again figures into what respondents would do differently in the volunteer management phase. Respondents reinforced that volunteers truly needed to understand the time commitment required for the project. Similarly, they said they needed to spend more time orienting the volunteer to the project's requirements.

Thirty-four percent of respondents said they would allocate more staff time to the project in the future, as well as give the project a longer timeline. Project timelines can get extended for a number of reasons, such as scheduling difficulties with the volunteer and the organization, scope drift on the original proposal, unexpected obstacles such as volunteers dropping out, and shifting priorities. Still, nearly 23% said they would not do anything differently.

The open-ended responses echo the results above for the most part. The responses talk about commitment on the part of the volunteer and his or her employer (when relevant), a mismatch of motivations between the nonprofit and the volunteer, and the value of the work itself.

Is It Better to Pay for Professional Services?

Clearly pro bono engagements are not the solution for every nonprofit issue. The feedback from a few respondents who were unhappy with their pro bono experience was that it is sometimes better to pay a professional than to use pro bono volunteers. The reasons they cited were how long it took to get the deliverable, the quality of the deliverable, and lack of accountability of the volunteer as opposed to a hired consultant.

When a nonprofit hires a consultant, it is the client and it can demand the service it pays for in the timeline contracted. With a pro bono volunteer, the nonprofit has far less control and ability to "demand" anything from someone who is performing the service for free.

Paid professionals can often provide references or point to their success with other clients. Rarely, if ever, do pro bono volunteers provide references or proof of a good track record delivering on their projects. There is more surety of success when you are paying.

Ultimately, it may be a matter of choosing which projects should be work-for-hire rather than pro bono. Time-critical projects and projects of great importance—a strategic plan for instance—might be better accomplished with paid services. Projects with a flexible timeline, of a shorter term, or that are non-strategic may be the best choices for pro bono volunteers to work on. As one respondent said, "We want to move away from relying on pro bono services for anything that we consider important for our organization to accomplish."

Respondents said:

On commitment:
- Ensure the volunteer has the support of his/her employer to commit time and resources
- Try to help the volunteer understand the culture of the organization and get his/her commitment to work within that culture

On motivations:
- It is a challenge to make sure that volunteer projects are driven by organizational needs, and not volunteer needs (despite best intentions). There is a danger of creating volunteer projects for the purpose of keeping well-intentioned donors and supporters engaged. When a nonprofit's staff capacity is already stretched thin, this becomes more of a burden than help. Even when projects driven by agency needs are defined, it is difficult to allocate sufficient staff oversight and supervision (don't have volunteer coordinator/manager) to make it a meaningful experience for both parties
- Ensure the volunteer has the time and support to do the work effectively. Is this off the side of his/her desk and a feel good project or is it an intentional commitment to help the organization progress? Align motivations

On value of the work:
- It was our first time trying a pro bono service. We are more accustomed to paying our consultants and we're used to getting the service we pay for. It was difficult for us to wait for results given the volunteers' timelines and schedules
- I think I would create a financial incentive to ensure that the deliverable was actually implemented. It was so easy to dismiss the work since it cost us nothing
- The adage is true: You get what you pay for

Looking back on the volunteer management phase, what would you do differently next time that would ease the challenges you faced? (Select all that apply.)

Answer Options	Response Percent
Make sure that the volunteer truly understands the time commitment involved in the project	38.0%
Allocate more staff time to the project	34.0%
Spending more time orienting the volunteer to the project's requirements	31.9%
Give the project a longer timeline	25.7%
Create a more specific Statement of Work	24.3%
I would not do anything differently	22.9%
Scale back the scope of the project	15.6%
Engage a volunteer with a different set of skills	13.9%
Partner with a different corporation	4.2%
Other	9.7%

KEY FINDINGS

- Most challenging: Finding time to manage the volunteer/respond to questions
- Least challenging: Establishing a working relationship between the volunteer and leadership
- Do differently: Make sure the volunteer truly understands the time commitment involved in the project
- 23% would not do anything differently

Phase 4: Implementation of the Deliverable

How difficult it is to implement a project's deliverable is mainly dependent on what the deliverable is. This section of the survey asked the respondent to consider the most recent pro bono engagement and rate the tasks associated with that particular project.

In the table below, "Extremely Challenging" was assigned a rating of 1, while "Not at all Challenging" was assigned a 4. The lower the rating average, then, the more challenging that step or task was rated. The two most challenging tasks are shown in red below, while the two least challenging are shown in blue.

Overall Rating for Implementation of the Deliverable Phase: 2.97

Please rate the difficulty of the following aspects of the implementation of the deliverable phase of a pro bono project. If you have done more than one pro bono project, please refer to the most recent one in answering these questions.						
Answer Options	Extremely Challenging	Challenging	Somewhat Challenging	Not at all Challenging	N/A	Rating Average
Implementing the deliverable	8.2%	25.2%	36.0%	24.6%	5.9%	2.82
Communicating changes to the staff	2.0%	16.0%	30.8%	39.3%	11.9%	3.22
Getting staff support for the deliverable	3.5%	15.3%	29.4%	42.1%	9.5%	3.22
Identifying organizational budget to carry the project forward or to implement the recommendations	13.4%	25.5%	29.1%	20.0%	11.8%	2.63
OVERALL						2.97

What Was Challenging…

The four implementation tasks fall neatly into two groups of challenging and not that challenging. The most challenging task was identifying the organizational budget to implement the recommendations. Thirteen percent rated this "extremely challenging" and nearly 26% of respondents rated this "challenging." Twenty-nine percent said it was "somewhat challenging" and 20% "not at all challenging." The spread most likely represents the reality that some projects will require more investment to implement than others.

The respondents rated "implementing the deliverable" as a whole as the second most challenging task with an average rating of 2.82—between "challenging" and "somewhat challenging." A plurality, 36%, said it was "somewhat challenging."

…And What Was Not

The less challenging tasks were communicating the changes to the staff and getting their support for the deliverable. Assuming the staff was aware of the project and that some staff members even worked with the volunteer, there was a lot of time for them to prepare for potential changes. And some deliverables don't have a lot of impact on the staff and aren't hard to get support for. Whereas new human resources policies may be difficult to sell to staff, a new marketing plan may not.

What They Would Do Differently

Although getting staff support for the deliverable was overall rated only "somewhat challenging," the top change the respondents would make the next time is to hold update meetings with staff to solicit feedback before the deliverable is finalized. Thirty-one percent said that. Yet 30% said they wouldn't do anything differently—a higher percentage than any other phase of a pro bono project.

The cost of implementation figures into what nonprofits would do differently. Twenty-six percent said they would investigate potential costs of implementation prior to committing to the engagement. Nearly 26% said they would include implementation assistance in the statement of work, a change that would ease the implementation process and potentially save money as well.

When asked to list other things they would do differently in the implementation phase, the respondents pointed to both a lack of resources and a mismatch of expectations as sticking points.

Looking back on the implementation phase, what would you do differently next time that would ease the challenges you faced? (Select all that apply.)	
Answer Options	Response Percent
Hold update meetings with staff to solicit feedback before the deliverable is finalized	31.3%
I would not do anything differently	30.4%
Investigate potential costs of implementation prior to project commitment	26.2%
Include implementation assistance in the Statement of Work	25.5%
Hold update meetings with leadership to solicit feedback before the deliverable is finalized	24.5%
Ask for interim reports to check for scope drift	18.8%
Ask for interim reports to check for deviations from the agreed upon timeline	18.0%
Other	8.2%

Respondents said:

On resources:
- Try to identify a small grant to help with implementation costs, e.g., backfilling a post to allow time for front-line staff to engage more fully
- Implementation was not scoped into our project. Thus, availability of resources for implementation continues to be an issue

On expectations:
- In some cases, the deliverable that a skills-based or pro bono volunteer has given is too complex or costly for the organization to implement. I believe there is often a challenge translating a business approach to the nonprofit where funds and capacity can be more limited. This then results in basically a waste of time—the volunteer really needs to understand the parameters within which something might be implemented
- Adequately describe to leadership exactly what would be asked of them during implementation. Though they were updated, in the end, implementation seemed to be somewhat of a surprise

KEY FINDINGS

- Most challenging: Identifying organizational budget to implement the recommendations
- Least challenging: Communicating changes to the staff and getting staff support for the deliverable
- Do differently: Hold update meetings with staff to solicit feedback before the deliverable is finalized
- 30% would not do anything differently
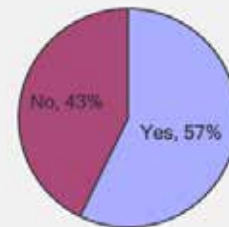
Phase 5: Evaluation of the Engagement

Satellite offices collected more data than head-quarters: 69% of satellite offices collected input data, but only 44% of headquarters did and more than 71% gathered process data, vs. 58% at headquarters. Evaluation of the project's success is more frequently part of the pro bono process for nonprofits outside the U.S. and Canada (67% vs. 56%).

Evaluation of any project can be challenging. In the case of a pro bono engagement, the nonprofit can evaluate a number of aspects of the project, including the process of finding and working with a volunteer, as well as how well the engagement and its deliverable met its goals. The survey asked about overall evaluation, what types of data were collected and what exactly was evaluated.

Did you evaluate the success of the project?

No, 43%

Yes, 57%

Overall, 57% of respondents said they evaluated the success of the project. For the 43% that did not evaluate success, the main reason was that they simply did not have the staff available to collect the data. Nearly 40% said they did not have the funds to hire someone to collect the data either. One-third said that they were not sure what data they wanted. Nearly as many said that it never occurred to them to collect evaluation data.

Why not? (Select all that apply.)	
Answer Options	Response Percent
We did not have the staff available to collect the data	47.4%
We did not have the funds to hire someone to help with data collection	39.4%
We were not sure what data we wanted	33.5%
It never occurred to us to collect data to evaluate the project	31.3%

There are several aspects of a pro bono project that can be included in an evaluation. The types of data collected, of course, depend on what you want to learn about the pro bono engagement. For the group that did evaluation work, more than 75% collected data on the outcome of the project, measuring the difference that the deliverable made. Almost 60% collected process data, measuring how well the project was managed and executed. The smallest yet still significant percentage—46%—collected input data, which might have included how much staff time was required to complete the project, how much money was spent, and the like.

Ultimately, the majority of respondents said they evaluated both the development of the deliverable as well as the implementation of the deliverable. Almost 59% not only looked at the development process but also drilled down into the implementation and the results—the phase that the pro bono volunteer is frequently absent for. About one-quarter only evaluated the implementation of the deliverable and nearly 17% only evaluated the development of the deliverable.

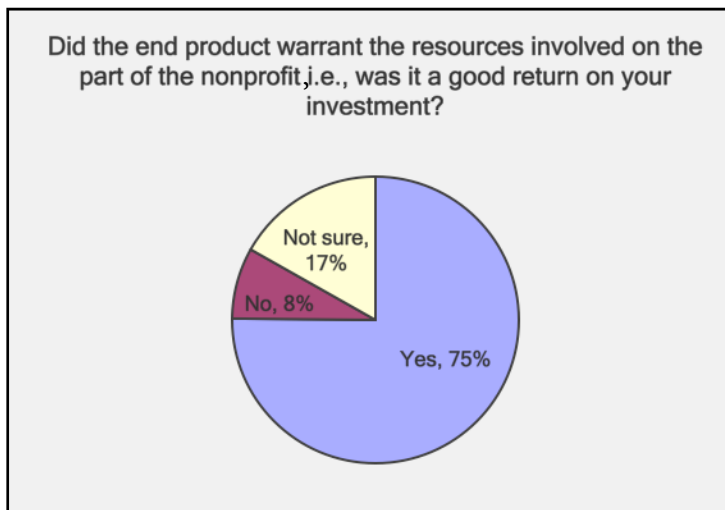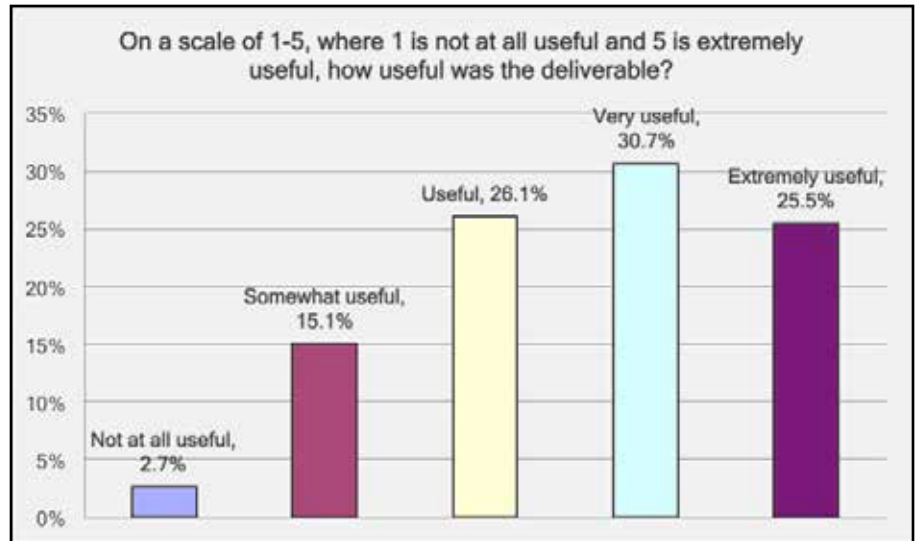| What type of data did you collect? (Select all that apply.)	
Answer Options	Response Percent
The process: how well the project was managed and executed	59.7%
The input required: how much staff time was needed, how much money was spent in the course of the project and implementing the recommendations	45.7%
The outcome of the project: measuring the difference the deliverable has made	75.8%

KEY FINDINGS
- 57% of respondents evaluated the success of the project
- 59% evaluated both the development and implementation of the deliverable
- 76% measured the outcome—the difference the deliverable made

Post-Engagement Impressions

When they took stock at the end of their pro bono engagement or engagements, respondents felt that the experience was worthwhile in terms of the quality of the deliverable and in the return on their investment of resources.
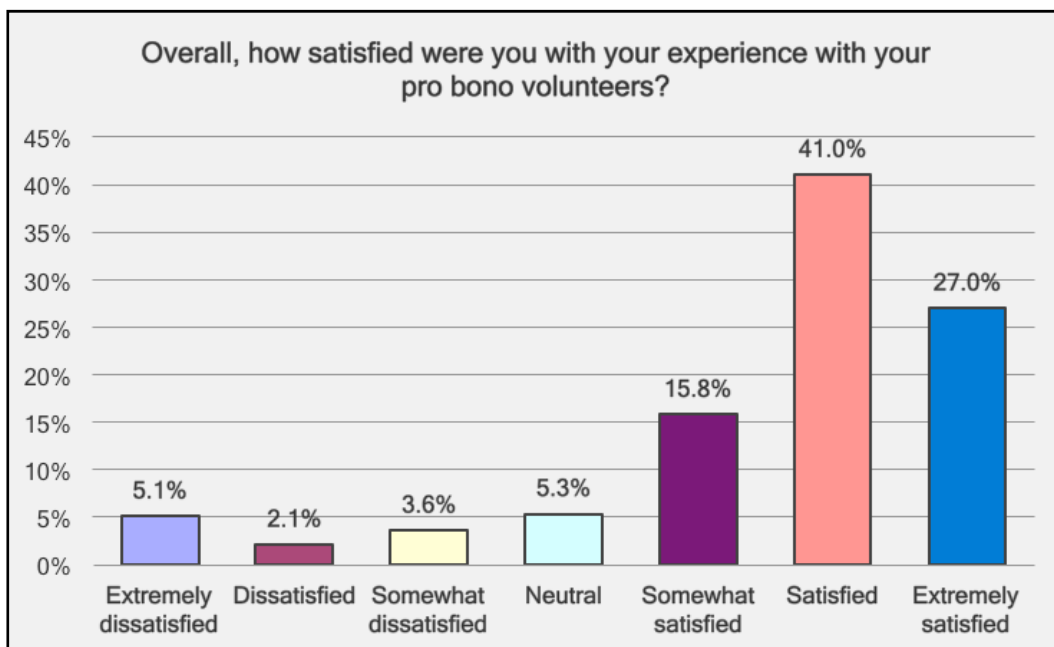
Fully one-quarter of respondents said that the deliverable was "extremely useful" and another 31% said it was "very useful." Twenty-six percent said it was "useful" and 15% "somewhat useful." Less than 3% said it was not at all useful. That means that 97% of respondents found the final product at least somewhat useful and more than half said it was at least very useful. That result is much higher than one might believe if only anecdotal evidence is considered.

On a scale of 1-5, where 1 is not at all useful and 5 is extremely useful, how useful was the deliverable?

- Not at all useful, 2.7%
- Somewhat useful, 15.1%
- Useful, 26.1%
- Very useful, 30.7%
- Extremely useful, 25.5%

Did the end product warrant the resources involved on the part of the nonprofit, i.e., was it a good return on your investment?

- Yes, 75%
- Not sure, 17%
- No, 8%

Respondents were also asked to evaluate their return on their investment of resources, which is more than just the usefulness of the deliverable. About 75% said they felt the end product was a good return on their investment of resources. Just 8% said it wasn't, but nearly 17% said they weren't sure.

The overall satisfaction rate was high for this survey group. Nearly 84% were at least somewhat satisfied with the pro bono experience. Twenty-seven percent were extremely satisfied and 41%—a plurality—were satisfied. Nearly 11% expressed some dissatisfaction with the experience. Five percent said they were neutral.

Overall, how satisfied were you with your experience with your pro bono volunteers?

- Extremely dissatisfied: 5.1%
- Dissatisfied: 2.1%
- Somewhat dissatisfied: 3.6%
- Neutral: 5.3%
- Somewhat satisfied: 15.8%
- Satisfied: 41.0%
- Extremely satisfied: 27.0%

Respondents said:

Respondents were asked why they were satisfied or dissatisfied with the results of their pro bono project. A selection of verbatim responses are below. It is important to note that there are solutions to the problems noted by those who were dissatisfied. Those solutions are discussed beginning on page 44.

From those who expressed some level of satisfaction:
- The pro bono volunteers we have worked with have always had a connection to our organization through an emotional bond or experience
- The project could not have been accomplished without the services provided by the pro bono volunteers. The pro bono volunteers were very professional and delivered an excellent product that the program could not otherwise have afforded
- Our pro bono work is always done with professionals skilled at doing what we need done. They get it. There is no fooling around. It is all business for them
- Although we did not use the end logo product, our team learned a great deal from the pro bono team members throughout the process, finding it rich and rife with long-lasting helpful marketing and branding information that we would not have otherwise gotten
- It was valuable to work with volunteers who came from different backgrounds and who brought fresh perspectives. They helped unlock creative, low cost solutions to issues, which we had been grappling with for a while.
- For all of the shorter and longer-term projects we've worked on with pro bono support in recent years, the volunteers have not only focused primarily on our needs for the project, but also became involved with the organization—going on to join boards, attend events, etc. Our pro bono volunteers have, in several cases, become true partners beyond the scope of the project
- Because we used an intermediary organization to select the volunteer team, and had a committed volunteer to manage the process, we were very satisfied with the process
- Our organization is very limited with resources. The pro bono service provided is very important and can determine the future of the organization. As such, I cannot stress how valuable this service may be to those organizations that are on the crossroads of either being extremely successful or failing to provide adequate services

From those who expressed some level of dissatisfaction:
- The amount of time and resources to manage the pro bono project was not worth the length of time and lack of a final work product that they produced. We would have been better off just reallocating funds to pay for the project
- Pro bono volunteers are extremely self centered and only want to "get something" from the experience
- The specific volunteer, with a very good skill set for the position, was unreliable and unprofessional
- Perhaps it's a lesson in managing expectations, but from the client perspective, it often feels like the pro bono client gets the leftovers, the leftover time and staff resources, rather than treatment as a regular client with a different accounting relationship. The most successful pro bono relationships don't make the client feel like they are always asking for favors, and are no different than a paid relationship, with the opportunity for candid feedback and expectations of deliverables as in any contracted service
- Working with pro bono volunteers is always frustrating. Over 8 years, we have never had a 100% successful project working with pro bono volunteers

Perhaps the most telling evidence of a successful pro bono project is whether the nonprofit would do another pro bono project in the future. The answer was emphatically "yes," with 90% saying they would use a pro bono volunteer in the future. Almost no respondents said they would not do another project (1%), and 9% said they weren't sure.

Would you engage in another pro bono project in the future?

No 1%
Not sure 9%
Yes 90%
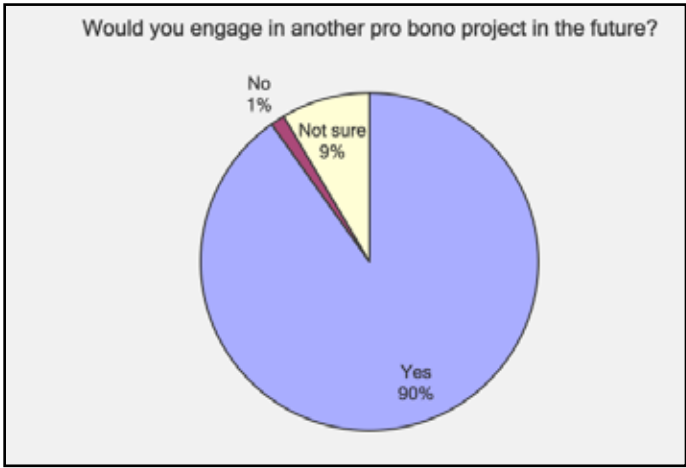
Respondents said:

The reason why some respondents would not do another project or why they were not sure if they would do another project echo the complaints from respondents who were dissatisfied with the experience. Respondents said:

- Yes, but we would likely fashion the relationship to be a combination of paid/donated services rather than 100% pro bono
- We would, but we would be much wiser about scoping the project to very discrete tasks and leaving the strategy to internal staff or to volunteer partners we were confident would stick around for the duration of the project
- We will continue to engage pro bono for specific projects that are small and clear. We are not sure about larger more involved projects
- While pro bono sounds great, the amount of time and effort put into the projects does not justify the pro bono opportunity. Most often we are contacted by a company wanting to provide pro bono support instead of a contribution, or one of our donors has referred a company to provide pro bono services that we didn't request. We spend more time creating the project than it is worth
- I would, but I would be much more selective in who I work with—treating it like a job interview

KEY FINDINGS

- 97% of respondents said the pro bono deliverable was at least somewhat useful
- 26% said it was extremely useful
- 75% said there was a good return on investment
- 90% would engage in another pro bono project in the future

SECTION 2:
Respondents Who Have Not Used Pro Bono Volunteers

Introduction

Nineteen percent, or 272 respondents to the survey, had no experience with pro bono at the time they completed the survey. The survey asked this group if they ever felt their organization had a need with which they believed skills-based or pro bono volunteers could assist. Nearly 82% said "yes."

The top areas of need were fundraising, marketing/branding and PR/communications— the same as for the group that has used pro bono although in a different order. The largest percentage said they needed pro bono help in fundraising although nearly as many said they needed help in marketing/branding. More than 55% said they could use help with PR/communications.
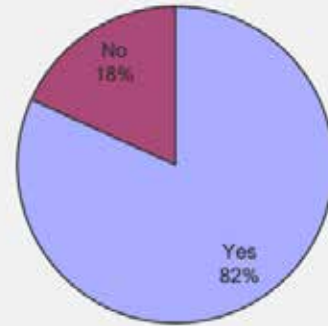
Technology, strategic planning/management, and board development rounded out the top six issues these nonprofits said they need help with. This is also the same result as the group that has used pro bono. In the "other" category, respondents mentioned that they could use pro bono legal help and assistance in web development.

If so many nonprofits know they have an issue and believe that pro bono can help, why haven't they sought out a pro bono volunteer? The majority (53%) said they just don't know how to access these services. Twenty-eight percent said they hadn't thought about using pro bono to help them with their issue.

A significant percentage of respondents worry about the process of pro bono—whether they have the time and staff to undertake a project, how to define the project for the volunteer, and how to manage the project.

For some respondents, the reasons why they haven't sought pro bono services are tough obstacles to overcome. More than 18% said they aren't convinced that pro bono will even produce a reasonable result. Nearly 6% said their leadership is not in favor of bringing on volunteer help. About 3% said the staff was not in favor of pro bono. Without support of leadership and staff, it is unlikely a nonprofit will pursue a pro bono engagement.

Have you ever had an organizational/management issue that you believe skills-based or pro bono volunteer services would help address?

No 18%
Yes 82%

In what area(s)? (Select all that apply.)	
Answer Options	Response Percent
Fundraising	65.7%
Marketing/Branding	63.3%
PR/Communications	55.4%
Technology	43.8%
Strategic Planning/ Management	41.8%
Board Development	41.4%
Human Resources and Leadership Development	36.3%
Financial Management	25.5%
Accounting/Audit	23.5%
Operations	19.9%
Risk Management	18.3%
Tax Advice/Preparation	10.4%
Other	6.8%

Why hasn't your organization sought skills-based or pro bono services for these issues? (Please select all that apply.)	
Answer Options	Response Percent
Didn't know how to access pro bono services	52.9%
Didn't believe we have the staff to devote to undertaking pro bono projects	34.7%
Didn't believe we have the time to devote to undertaking pro bono projects	30.6%
Didn't think about using pro bono services for this issue	28.1%
Didn't know how to define the project for the consultant (lack of clarity on the project scope)	25.2%
We are currently seeking help for this issue	20.2%
We were not convinced that pro bono will produce a reasonable result	18.6%
Didn't know how to manage the project	17.8%
Our leadership is not in favor of bringing on pro bono help	5.8%
We have seen negative impact from pro bono help with other organizations	3.3%
Our staff is not in favor of bringing on pro bono help	3.3%

To what extent do you agree that you could increase your organization's capacity to be effective if you could get free (i.e., pro bono) consulting resources?
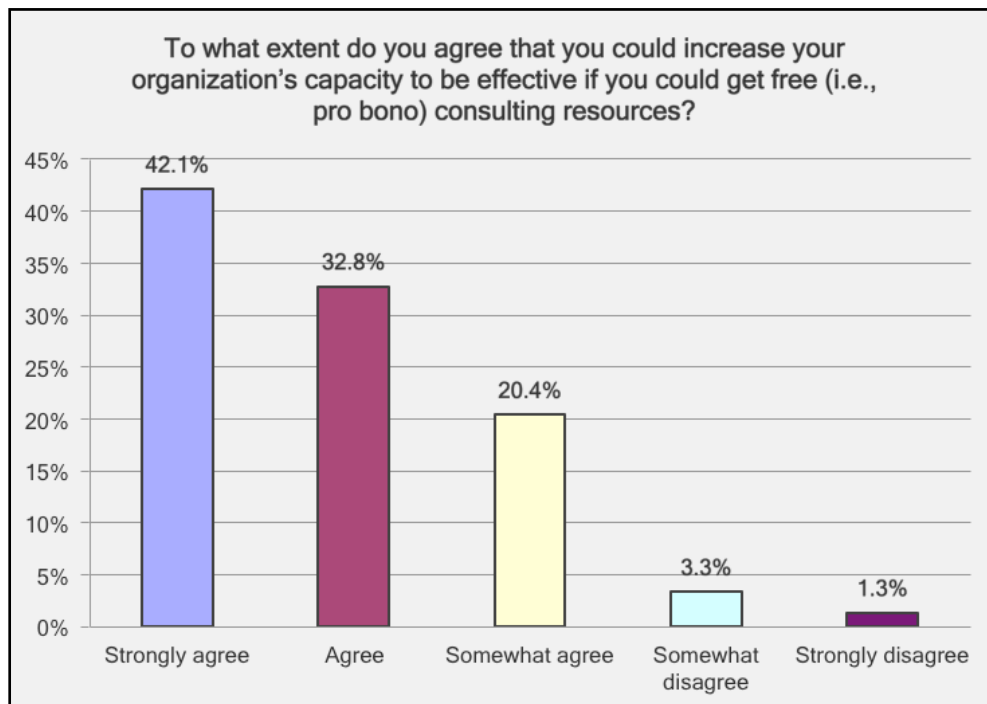
Even without experience with pro bono, nearly 75% either strongly agreed or agreed that they would increase their organization's effectiveness if they could get pro bono help. A plurality—42%—strongly agreed with that statement. Less than 5% disagreed that pro bono can increase an organization's capacity.

KEY FINDINGS

- 82% said they have had an organizational/management issue that pro bono services would have helped address
- 66% said they had a need for fundraising help
- 53% said they don't know how to access pro bono services
- 42% strongly agreed that they could increase their organization's effectiveness if they could get pro bono consulting resources

Phases of a Pro Bono Engagement

Respondents who have not used pro bono were presented with the same list of tasks in each phase of a pro bono engagement and asked to rate how challenging they think each task would be. The same rating scale was used as before so that the responses of the two groups could be compared.

In the tables that follow, "Extremely Challenging" was assigned a rating of 1, while "Not at all Challenging" was assigned a 4. The lower the rating average, then, the more challenging that step or task was rated. The three most challenging tasks are shown in red below, while the three least challenging are shown in blue.

Phase 1: Scope and Preparation

Respondents felt that the most challenging aspects of a pro bono engagement would be identifying sufficient funds to support the project, estimating the staff time required for the project, and developing evaluation metrics for the project. These are the same top challenges as identified by the respondents who have used pro bono before.

> **Overall Rating for Scope and Preparation Phase:**
> **2.86**

What Seems Challenging…

This inexperienced group rated finding funds as the most challenging, giving it an average rating of 2.17—lower than the experienced group, which rated it 2.48. More than 30% said it would be extremely challenging to find funds to support a pro bono project and an equal number said it would be challenging. In reality, just 19% of the experienced respondents said finding those funds was extremely challenging.

…And What Does Not

As for the least challenging tasks in the scope and preparation phase, the inexperienced group also chose the same three tasks as the "easiest": selecting the issue to target and gaining approval and buy-in from both staff and leadership. The average ratings were different though—the inexperienced group rated these three tasks as more challenging than the experienced group. For example, the inexperienced group rated gaining approval of staff as the least challenging at 3.24, whereas the experienced group rated that task 3.43—a score that is closer to "4", which represents "not at all challenging."

Overall, the respondents who have not used pro bono rated the scope and preparation phase a 2.86. The respondents who have used pro bono rated it 3.07, or slightly less challenging than the inexperienced group.

The following are different aspects of the scope and preparation phase of a pro bono volunteer engagement. For your nonprofit, how challenging do you think each of these aspects would be?						
Answer Options	Extremely Challenging	Challenging	Somewhat Challenging	Not at all Challenging	N/A	Rating Average
Conducting a needs assessment to identify the issues that need to be addressed	8.8%	31.5%	31.2%	26.9%	1.5%	2.77
Selecting the issue that the organization wants to address	5.8%	18.1%	34.6%	40.0%	1.5%	3.11
Identifying a project needs statement	5.4%	21.5%	36.9%	33.5%	2.7%	3.01
Developing the project objectives	5.9%	20.4%	39.2%	32.5%	2.0%	3.00
Defining the project's scope	5.5%	27.0%	39.5%	26.2%	2.0%	2.88
Preparing a project proposal and checklist	7.8%	21.7%	38.4%	29.5%	2.7%	2.92
Gaining approval/buy-in from leadership	9.7%	16.7%	23.6%	44.6%	3.1%	3.09
Gaining approval/buy-in from staff	6.2%	14.3%	24.0%	49.2%	6.2%	3.24
Estimating the staff time required for the project	8.5%	30.2%	37.2%	21.3%	3.5%	2.73
Preparing a reasonable timeline for the project	7.8%	22.1%	43.8%	23.6%	1.2%	2.86
Identifying sufficient funds to support the project	30.6%	29.8%	24.0%	11.6%	2.7%	2.17
Creating project milestones	5.8%	23.3%	42.6%	24.0%	2.7%	2.89
Developing quantitative and qualitative evaluation metrics to assess short- and long-term success	15.1%	31.0%	34.5%	15.1%	2.3%	2.52
OVERALL						2.86

KEY FINDINGS
- Most challenging: Identifying sufficient funds to support the project
- Least challenging: Gaining approval/buy-in from the staff

Phase 2: Outreach and Securement of Services

What Seems Challenging…

Two tasks were rated far more challenging than any others in the outreach and securement of services phase. The hardest tasks, according to the inexperienced group of respondents, would be identifying the right individual to provide the necessary support, rating it 2.06. By comparison, the experienced group gave this task a 2.61—still one of the most challenging but not to the same degree as the inexperienced group.

The second biggest challenge was locating sources of pro bono help—rated 2.14. The experienced group also said that it was relatively more challenging than other tasks on the list, but the overall rating was 2.81, closer to "3" than "2", with "3" being "somewhat challenging."

Overall Rating for Outreach and Securement Phase: **2.69**

…And What Does Not

A number of tasks' ratings were clustered around a "3," with the task of selecting the right staff member for the project rated a 3.03 and the—relatively—least challenging of the list. These respondents also felt that agreeing on the scope of the project and on a viable Statement of Work would be relatively less challenging than other tasks, rating them 2.90 and 2.91, respectively. The respondents with pro bono experience tended to agree with this assessment, although again they rated these tasks as a bit easier than the inexperienced group.

Overall, the inexperienced group rated the outreach phase a 2.69, while the experienced group rated it 3.00. As in the preparation phase, those who have not had a pro bono engagement believe this phase is somewhat harder than those that have had a pro bono engagement.

The following are different aspects of the outreach and securement of services phase of a pro bono volunteer engagement. For your nonprofit, how challenging do you think each of these aspects would be?						
Answer Options	Extremely Challenging	Challenging	Somewhat Challenging	Not at all Challenging	N/A	Rating Average
Locating sources of pro bono help	25.7%	41.2%	23.7%	7.8%	1.6%	2.14
Identifying the right individual to provide the necessary support	28.3%	41.9%	22.9%	5.4%	1.6%	2.06
Communicating the project to potential sources of volunteers	7.1%	32.2%	35.7%	23.1%	2.0%	2.76
Defining the skill set(s) required for the project	4.7%	29.1%	42.9%	21.3%	2.0%	2.82
Selecting the right internal staff member(s) for the project	7.4%	19.5%	30.9%	37.1%	5.1%	3.03
Interviewing/selecting the right volunteer(s) for the project	9.1%	24.4%	39.4%	25.2%	2.0%	2.82
Making sure that the volunteer understands the time commitment involved in the project	8.2%	27.5%	37.3%	24.7%	2.4%	2.80
Agreeing on the scope of the project	5.5%	23.4%	45.3%	24.2%	1.6%	2.90
Agreeing on a viable Statement of Work	4.8%	23.3%	44.6%	24.5%	2.8%	2.91
OVERALL						2.69

KEY FINDINGS	• Most challenging: Identifying the right individual to provide the services • Least challenging: Agreeing on a viable statement of work

Phase 3: Volunteer Management

What Seems Challenging…

Inexperienced respondents said they are most concerned about finding the time to manage the volunteer and the quality of the final product. "Getting a useful deliverable" was rated the most challenging, at 2.71, and related tasks, such as "Getting the volunteer to produce quality work" and "Getting the volunteer to finish the project" were rated 2.90. Finding time to manage the volunteer and respond to questions was rated 2.86, or virtually the same. Experienced pro bono users also said that finding time was challenging, but did not find that getting a quality product was a difficult as the inexperienced group feared. "Getting the volunteer to produce quality work," for example, was rated 3.31.

…And What Does Not

The respondents were confident that communicating with the volunteer would not be a problem, rating "Understanding the volunteer's communications" 3.26 and "Providing candid feedback to the volunteer" 3.23. Nor were they particularly concerned about establishing a working relationship between the staff and the volunteer. The experienced group of respondents agreed, also rating these tasks as among the least challenging. Overall, the inexperienced group rated this phase 3.03, versus 3.19 for the experienced group. Both groups rated this phase of a pro bono engagement as the least challenging.

The following are different aspects of the volunteer management phase of a pro bono volunteer engagement. For your nonprofit, how challenging do you think each of these aspects would be?

Answer Options	Extremely Challenging	Challenging	Somewhat Challenging	Not at all Challenging	N/A	Rating Average
Understanding the volunteer's communications	2.5%	11.9%	40.6%	42.2%	2.9%	3.26
Ability to engage with the volunteer on a regular and timely basis	5.8%	23.5%	37.4%	32.1%	1.2%	2.97
Finding time to manage the volunteer/respond to questions	7.4%	26.7%	36.6%	27.6%	1.6%	2.86
Understanding cultural differences between the organization's staff and the volunteer	4.1%	15.3%	36.8%	39.3%	4.5%	3.16
Accessing the data or resources requested by the volunteer	4.6%	19.5%	42.3%	31.1%	2.5%	3.03
Having the volunteer stay on schedule	5.3%	18.5%	50.2%	23.5%	2.5%	2.94
Having the organization's staff stay on schedule	5.8%	23.2%	39.4%	27.8%	3.7%	2.93
Keeping to the project's original scope	2.9%	23.0%	41.4%	30.5%	2.1%	3.02
Establishing a working relationship between the volunteer and the staff	2.5%	10.4%	37.5%	45.8%	3.8%	3.32
Establishing a working relationship between the volunteer and leadership	5.0%	15.8%	34.0%	43.6%	1.7%	3.18
Providing candid feedback to the volunteer	2.5%	18.3%	31.3%	46.3%	1.7%	3.23
Getting the volunteer to produce quality work	7.9%	20.3%	42.7%	26.6%	2.5%	2.90
Getting the volunteer to finish the project	8.7%	20.3%	41.1%	27.8%	2.1%	2.90
Getting a useful deliverable	12.4%	24.5%	39.0%	21.2%	2.9%	2.71
OVERALL						3.03

KEY FINDINGS

- Most challenging: Getting a useful deliverable
- Least challenging: Establishing a working relationship between the volunteer and the staff

Phase 4: Implementation of the Deliverable

What Seems Challenging…

Like the experienced group, the inexperienced group felt that finding the money to move the project forward or to implement the recommendations would be the most challenging aspect of this phase. The inexperienced group rated this 2.32 and the experienced group rated it 2.63.

…And What Does Not

Both respondent groups felt that communicating changes to the staff would be easier than finding funds. The inexperienced group rated "Communicating changes to the staff" 3.01 and "Getting staff support for the deliverable" 2.96. The experienced group rated both of those tasks 3.22.

Overall, the inexperienced group rated the implementation phase 2.72, versus 2.97 for the experienced group.

The following are different aspects of the implementation of the deliverable of a pro bono volunteer engagement. For your nonprofit, how challenging do you think each of these aspects would be?						
Answer Options	Extremely Challenging	Challenging	Somewhat Challenging	Not at all Challenging	N/A	Rating Average
Implementing the deliverable	11.4%	29.8%	40.8%	15.5%	2.4%	2.62
Communicating changes to the staff	5.8%	22.6%	30.5%	35.4%	5.8%	3.01
Getting staff support for the deliverable	6.6%	19.8%	37.9%	29.6%	6.2%	2.96
Identifying organizational budget to carry the project forward or to implement the recommendations	21.9%	31.4%	34.3%	9.5%	2.9%	2.32
OVERALL						2.72

KEY FINDINGS

- Most challenging: Identifying organizational budget to implement the deliverable
- Least challenging: Communicating changes to the staff

Phase 5: Evaluation of the Engagement

The respondents with no pro bono experience consider both types of evaluation to be equally challenging. They rated the evaluation of the development of the deliverable a 3.34 and the evaluation of the implementation of the deliverable a 3.38. These ratings fall between "difficult" and "somewhat difficult" on the scale the respondents were given.

On a scale of 1-5, how prepared do you think you would be to collect data to measure the success of:						
Answer Options	Extremely difficult	Very difficult	Difficult	Somewhat difficult	Not at all difficult	Rating Average
The development of the deliverable	3.9%	14.9%	36.4%	31.6%	13.2%	3.34
The implementation of the deliverable or recommendations	5.5%	11.5%	34.5%	34.5%	14.0%	3.38

Perception vs. Reality: What the Inexperienced Don't Know

The respondent group that has not used pro bono consistently rated the phases and their associated tasks as more challenging than the group that has used pro bono before. Interviews with select respondents in that group also revealed a prevailing attitude that pro bono help is not worth the time and trouble. Many said they felt it was better to fundraise and pay for the services they needed. Some cited anecdotal evidence from colleagues to support their position and some just had a gut feeling that this was true.

Their perception is not the reality, though. The responses from the nonprofits that have used pro bono at least once (and many have used it multiple times), showed that the pro bono engagement was well worth the time and trouble. Success rates are high overall so it is likely that a pro bono project will be worth pursuing. And even if the first project does not go as planned, chances are the next one will.

Impetus for Pro Bono

What would make a nonprofit with no experience with pro bono take the leap and try it for the first time? The answer is partly familiarity with the potential volunteer or its company and partly readiness to accept help.

An offer of pro bono help from a company with which the nonprofit already has a relationship would induce more than 61% of this group to give it a try. Presumably there is already a level of trust between the two organizations that would make the venture more palatable and perhaps feel less risky.

Nearly 55% said that their organizational readiness for pro bono would be an inducement. Readiness is frequently the subject of conversations and an entire study of the topic was conducted by LBG Associates in 2011. Readiness can mean different things to different nonprofits but in the broadest terms it means that the nonprofit is focused on its mission, is clear about the need, and has the infrastructure in place to handle a capacity-building project. For more on readiness, see Appendix 1.

For 50% of respondents, staff familiarity with the potential volunteer would be an inducement. Like the offer of help from a grantee corporation, engaging a volunteer with a personal history and references from a staff member seems to reduce the risk and increase the chances of success.

What would induce you to take on a skills-based or pro bono volunteer for your organizational/management issue? (Select all that apply.)	
Answer Options	Response Percent
A company we have a relationship with offered pro bono help	61.4%
Belief that my organization is ready for the help	54.9%
Someone in my organization knows the volunteer	50.0%
The staff is open to outside consulting advice	48.4%
The issue has become critical	39.8%
Someone I know has had a positive experience with pro bono	36.2%
My board of trustees is pushing for it	31.7%
A company we don't have a relationship with offered pro bono help	27.2%
Support from a company might be at risk if we don't provide pro bono volunteer opportunities	8.9%
Other	16.7%

Other inducements the respondents cited in their open-ended comments also talk about familiarity with the volunteer or its organization and their experience with pro bono.

Respondents said:

- The company offering the work has a history of doing this type of pro bono work and is not looking to us to guide the project—instead coming in with a framework for how their help can be offered
- Primarily legal support given the deep history of pro bono in that field. Feels less risky
- We have received strong references from organizations we respect that the volunteer has done good work in the past
- Key factors are 1) knowing the skill set, personality, work-product quality and experience of the volunteer; 2) how much effort will be required to bring the volunteer up to speed regarding our organization
- Trust in the organization/person who refers the pro bono volunteer

Conclusions: Challenges and Solutions

Taking on skills-based or pro bono volunteers for the first time requires a whole lot of preparation—and a leap of faith. The prevailing feeling among nonprofits that haven't hosted a volunteer is that pro bono is not worth the time and trouble. There are lots of reasons why nonprofits don't take the leap: volunteers are unreliable… it takes up too much staff time…there's no money to implement the recommendations…they don't understand how we work…

No doubt these objections represent real scenarios. But the data collected show that pro bono is worth the investment, even when the project does not go perfectly. This research was intended to highlight the challenges and find solutions so that more nonprofits will take advantage of this resource. The solutions are both what the survey respondents and interviewees have already devised as well as solutions suggested by the research. Some solutions are expanded upon on page 47.

Challenge: Getting Started

SOLUTION **Be prepared.** From the starting line, the pro bono process might look like a marathon run all uphill. In reality, there are resources to inform and advise nonprofits on all aspects of a pro bono project. Many of the intermediaries, including Taproot and Common Impact, have online resources nonprofits can peruse before they get started. See Appendix 1 for a list of resources and links to them.

SOLUTION **Start small.** While an organization might have big issues to address, it will help to start with a small, discrete project. It might be designing an event invitation, or help with press releases or a fundraising event. Respondents mentioned finding a project that is in the normal work flow that can be turned over to a volunteer and free up the staff to work on something else.

SOLUTION **Ask your network for help.** Since, anecdotally, the best volunteers are those with an affinity for the nonprofit, exploring who your staff, Board and existing volunteers know to see if there is a skill set you need could produce a nice match. Vendors and clients might even know someone who can lend a hand with a skills-based or pro bono project.

Challenge: Finding the Right Help

SOLUTION **Interview candidates.** Many respondents advised that nonprofits treat potential volunteers as if they were hiring someone for the work. Ask for a resumé to see what that person's strengths are. It is essential that the person or persons you choose not only have the right skill set but also the commitment to the project and the organization. An interview can weed out the potential volunteers who are more interested in what they can get out of the experience than how they can help the nonprofit.

SOLUTION **Find local volunteers.** Technology makes it much easier to utilize the skills of a volunteer half a world away, but there is nothing like face-to-face interaction. Local volunteers can tour your facility, meet your staff and board members and maybe even your clients. Respondents said it really makes a difference in how well the project goes.

SOLUTION **Get references.** Ideally the nonprofit could get a reference from another nonprofit for which the volunteer has worked. In lieu of that, ask for work samples related to the project. This will be easy if the volunteer is in the communications or graphic design field. It may be harder in other fields but it is worth asking.

SOLUTION **If working with a project team, vet the team leader.** Teams are great, as the nonprofit can benefit from multiple skill sets and strengths of each team member. They can also be dysfunctional and prone to member dropout. A strong team leader can work through those issues without disrupting the project, according to the respondents. The nonprofit should interview and vet the team leader as if he or she was the sole volunteer.

SOLUTION **Don't be afraid to say no.** Corporate funders and board members can unknowingly exert pressure on nonprofits to take on a pro bono volunteer. Resist saying "yes" just because of the relationship. It is never a good idea to create a project to satisfy someone. If they are truly interested in the organization's success, they should be able to accept a gracious thank you but no thank you.

SOLUTION **Check for affinity with the mission.** Again and again, nonprofits surveyed said that the best volunteers are the ones that can demonstrate an affinity to the organization and/or its mission. Volunteers like that, respondents say, work harder, make their deadlines and produce quality work. That's why the best pro bono volunteer might be someone who is already involved with your organization. Try to mine your existing volunteer network for the skill set you need.

Challenge: Finding the Time

SOLUTION **Assign a point person on staff to manage the project and the volunteer.** It seems obvious, but when a nonprofit has a small staff, all of whom are already stretched thin, it can be tempting to spread the responsibility around. Instead, assign the project to one staff person and have the volunteer communicate with that person, who will then get the volunteer the information he/she needs and connect him/her to additional resources. That person's regular responsibilities can perhaps be shifted around to accommodate this role.

SOLUTION **Overestimate the staff time needed and build that into the timeline.** How many hours per week is reasonable for your point person to spend? If that person can only commit two hours per week, for example, then create a timeline that won't cause that person to fall behind in other work.

SOLUTION **Take the time upfront to orient the volunteer.** Many respondents said they needed to do a better job onboarding volunteers. A few said they would take the time to construct an onboarding program for volunteers to introduce them to the organization, its mission, how it works on a day-to-day basis, and its issues. An important piece of the onboarding process is to teach the volunteer that nonprofits run differently than for-profits and solutions that may work in a for-profit environment will not work in a nonprofit. One respondent mentioned that this is the time to—gently—ask the volunteer to leave their ego at the door. Some volunteers tend to think they know everything when in fact their ignorance of how nonprofits run can cause friction and even failure of the project itself.

SOLUTION **Clearly establish roles and responsibilities for the staff.** Clarity on what the staff is expected to do to support the volunteer will help eliminate confusion over "who is doing what" and save time.

SOLUTION **Use pro bono volunteers for regular work flow or client work.** While pro bono volunteers are frequently used to tackle big issues, such as financial stability or strategic planning, skilled volunteers can help out with regular work flow or client work, freeing staff for other projects. Volunteers can use their skills to work on public relations, human resources or as mentors to clients, depending on the mission of the organization.

Challenge: Keeping the Project on Track

SOLUTION **Implement regularly scheduled check-ins and do not cancel them.** Because the volunteer has a day job and the nonprofit staff an existing workload, it is very easy for a pro bono project to go on longer than intended. Weekly or biweekly check-ins, even if they are brief phone calls or Skype sessions, are critical to communication and staying on track. These check-ins should never be canceled, even if there has been no

progress, as having to show up for these meetings keeps the project in mind and can uncover obstacles in the path.

`SOLUTION` **Have a contingency plan in the event of problems.** A number of respondents said that they wished they had formulated contingency plans if the project went awry. The issues these respondents mentioned were disappearing volunteers, staff turnover, shifting priorities and missed deadlines. Thinking ahead about how some common problems will be handled can avoid wasting time when the problems crop up.

`SOLUTION` **Ask the volunteer to commit to a realistic number of hours per week.** Volunteers will say they are committed to the project. Take the next step and ask how many hours the volunteer believes that he or she can commit each week. Some may not have thought about it in those terms. When you have the answer, then formulate the timeline that fits the time that both the staff and the volunteer realistically have to offer.

`SOLUTION` **Look for retirees.** Retirees have a wealth of professional skills and more time available than those with full-time jobs. Some corporations have retiree volunteer programs, which makes finding these gems relatively easy. Other places to check would be the local senior centers, service clubs, retiree groups such as SCORE, and personal and Board connections.

Challenge: Funding the Implementation

`SOLUTION` **Include implementation assistance in the Statement of Work.** A common complaint about pro bono volunteers is that they present the deliverable and then walk away. This is often true when the volunteers are functioning as consultants. In these cases, it is prudent to expand the Statement of Work to include implementation help. If working with a corporate partner, implementation help might even require a different set of volunteers from a different department in that corporation.

`SOLUTION` **Ask for an implementation grant if working with a corporation.** Sometimes when a corporation offers volunteers, it already makes grants to the nonprofit. If this is the case, it may be an easy ask. Other corporations may prefer to provide volunteer help without any cash attached. It might be worth asking if the nonprofit can demonstrate that without cash resources the volunteer's work is for naught.

`SOLUTION` **Investigate potential funding requirements prior to beginning the project.** While it might seem obvious to plan ahead for cash requirements, 26% said they wished they had investigated the potential cost of implementation before the project was begun. If that dollar figure is not reasonable, then the project should not even be pursued.

`SOLUTION` **Fundraise for implementation before project is complete.** Once the nonprofit knows the dollar figure, the fundraising can begin. With the project in process, there is a compelling story to be told to potential donors. In fact, the fundraising itself could be another pro bono project for a different volunteer, maybe even from the same source.

Challenge: Evaluating Success

`SOLUTION` **Keep it simple.** Unlike a large grant, in which the funder is looking for metrics to show that its donation is being used efficiently and for the intended purpose, a pro bono project does not require a lot of evaluation.

To evaluate the success of the project, go back to the reason why the volunteer was engaged. What was the target issue? What was the goal? Was the goal achieved? Evaluation may be as easy as asking three key questions:
- Did the nonprofit get the deliverable it was promised?
- Was it delivered on time?
- Was it useful?

This may be all the leadership needs or wants to know to call the engagement a success or failure. Beyond that, the nonprofit might want to evaluate the outcome—the difference the project made either internally or to advance the mission—as is appropriate for the particular project.

What Nonprofits Need to Succeed

The research allowed nonprofits to have their voices heard. They said loudly and clearly that taking on pro bono volunteers is not easy but it is worth the trouble. They also said that there are resources that either do not exist or are too hard to find that would make it easier for them to use these volunteers. The suggestions below came from both those experienced with pro bono and those not. The corporate and intermediary communities are in an ideal position to provide these resources for the benefit of both the nonprofits and the growth of their pro bono programs.

The nonprofits surveyed said that the following would be helpful:

A comprehensive list of resources. A surprising percentage of respondents—both experienced and inexperienced with pro bono—said they were not aware of the free tools and resources available to them from a number of intermediaries, such as Taproot, Common Impact and Volunteer Canada. LBG Associates has taken the first step and assembled a list of resources provided by the research sponsors and other sources in Appendix 1 on page 54.

A one-stop collaborative website of online resources. Instead of visiting multiple sites for information, the nonprofits would like to see everyone with educational resources on using pro bono collaborate on a single site. This destination website would save them time looking for the information they need. A collaborative Google Ad Words campaign by the authors of these resources might make the site easy to find.

More templates and tools. There are templates and tools for many aspects of pro bono (see Appendix 1) but there could be more. Specific tools mentioned included:
- Interview questions for potential volunteers
- Checklist for vetting potential volunteers
- Sample Statement of Work
- Evaluation guidelines or tool
- Onboarding guide
- Document that presents the business case for pro bono to present to nonprofit Boards
- Sample timelines and milestones
- Training module for pro bono volunteers on how to work with a nonprofit
- Time estimates for different types of projects.

Volunteer matching site/volunteer database searchable by nonprofits. While nonprofits appreciate the opportunity to post projects and have potential volunteers apply for those projects, what they asked for in the study was the reverse. They would like to have a database of potential volunteers that they can search for the skill set and other qualifiers they are looking for. This gives the nonprofit more power over who they accept as a volunteer. Some respondents noted that they were disappointed with the quality of the volunteers who responded to a traditional project post and wished they could search for the right person themselves. A database of volunteers, searchable on skills, location, company, years of experience, etc., would solve that problem.

Community of users of pro bono. A number of respondents said they wished they would reach out to nonprofits that have used pro bono volunteers successfully who could act as mentors for them as they move through the process. While case studies are great sources of information, they want to be able to communicate with more experienced nonprofits.

Respondent Demographics: What's the Difference?

What Do The Respondents Look Like?

Eighty-two percent of nonprofits in the survey are based in the United States, 11% in Canada, and .2% in Mexico. The rest are based outside North America, with the largest pockets of respondents from Europe and Asia (about 2% each). Africa and Australia/New Zealand represent about 1.5% of respondents. (The demographic tables begin on page 52.)

The respondents work in a range of cause areas. Twenty-one percent are education and youth nonprofits and 14% are human services. Ten percent work in arts, culture or humanities and 9% in housing and homelessness. Other cause areas are represented by 5% or less of responding nonprofits.

The majority of respondents work in the headquarters office of the nonprofit (89%). The remaining 11% work in a local or satellite office.

Global Note

Overall, nonprofits outside the U.S. and Canada were more satisfied with the results of their nonprofit engagements, rating usefulness of the deliverable and return on investment higher than their North American peers.

A plurality of respondents is small nonprofits both in terms of budget and number of paid employees. Forty-five percent of respondents have a budget under $1 million. Eighteen percent have an organizational budget between $1 million and $2 million and 37% have a budget of $2 million or more. Thirty-two percent have five or fewer paid employees, including 8% with no paid employees. Thirty percent have between six and 20 employees, 26% have between 21 and 100 employees and 13% have more than 100 employees.

Do Demographics Make a Difference?

The data were cross-tabbed to look for significant differences in various demographic groups. The cross-tabs were:
- Small, medium and large nonprofits
- Location
- U.S. vs. Canada
- U.S. and Canada vs. rest of the world
- Nonprofit headquarters vs. local/satellite offices

The most surprising result of these analyses is that there are very few significant differences between demographic groups. The expectation was that the research would reveal diverse pro bono experiences by size and location. But the data do not support that hypothesis.

Size Does Not Matter Much

The size of the nonprofit, in particular, was expected to affect a number of factors, including the frequency of pro bono engagements, where volunteers come from, and whether the project was successful. To evaluate this, the data were cut by organizational budget into small ($0 - $999,999), medium ($1 million to $1.99 million) and large ($2 million and up) nonprofits.

The data showed little difference in the use of pro bono services among the three groups. There was no significant difference in the percentage of respondents who have used pro bono until the data were viewed for the smallest nonprofits in the study—$249,000 budget and under. Only 70% of these very small nonprofits used pro bono versus 81% of large nonprofits, for example.

There were differences in from where the nonprofits sourced their volunteers. The large nonprofits were

much more likely to find pro bono volunteers from a corporation with which they had a relationship than either the small or medium nonprofits. They were also more likely to say that the motivation for undertaking the project was being approached by a major funder. Large and medium nonprofits were more likely to use an intermediary than small ones. On the other hand, small nonprofits were much more likely to find a volunteer through personal networks than either medium or large nonprofits.

The small, medium and large nonprofits groups were nearly equally happy with the outcome of the pro bono projects. On all measures of satisfaction in the survey—overall satisfaction, return on investment, willingness to engage in another project—the small, medium and large nonprofits were all very positive about the experience. The small nonprofits tended to have slightly higher levels of satisfaction. For example, 93% of small nonprofits said they would engage in another project, versus 88% for medium and large nonprofits. The nonprofits in the $250,000 to $499,999 range were the happiest of all, showing statistically significant differences in how they rated the ROI on the project and how well the project addressed the target issue.

The data showed that size does not really matter in the world of pro bono. All nonprofits can benefit, from the smallest to the largest. The groups may find pro bono volunteers in different places, but in the end they have the same level of success and satisfaction.

The U.S. and Canada Are Not the Same

With the help of Volunteer Canada, RBC and Bénévoles d'affaires, the survey was distributed across Canada with sufficient response to make comparing the U.S. and Canadian pro bono experience possible.

While about three-quarters of the U.S. and Canadian respondents used pro bono, the U.S. respondents were more than twice as likely to have acquired the services from a corporation with which they have a relationship (47% vs. 21%). U.S. nonprofits were also far more likely to have used an intermediary—52% vs. 9% of Canadians.

And while overall satisfaction with pro bono was the same in the two samples, the Canadian nonprofits seem to have had an easier time. Their overall ratings for each of the pro bono phases were consistently on the less challenging side:

Apparently, despite many more Canadian nonprofits going it alone—not using an intermediary or working with a known corporation—they are finding the experience just a bit easier than their southern neighbors.

Scope and Preparation:	
U.S. 3.03	Canada 3.25
Outreach and Securement of Services	
U.S. 2.98	Canada 3.16
Volunteer Management	
U.S. 3.16	Canada 3.39
Implementation of the Deliverable	
U.S. 2.74	Canada 3.45

How Corporations Can Help

Because of the challenges nonprofits face when taking on a pro bono volunteer, corporations that want to grow their pro bono programs may find that their offers of help are politely declined.

For corporate pro bono programs to continue to grow, companies may need to dig deeper into why the non-profit is declining the offer and see what they can do to help it turn a "no" into a "yes."

Corporations can start by understanding where the sticking points are. The common ones are laid out in this report, as well as potential solutions. Companies can be a part of those solutions.

Nonprofit Challenge: Getting Started

SOLUTION **Educate them.** Companies can provide readiness resources, including links to online educational resources and printed materials, with permission from the copyright owners. Companies can also create their own materials describing their approaches to pro bono, what services they can provide, a typical project, and even testimonials from previous project hosts. The idea is to educate and reassure that the company is committed to making the volunteer relationship work. A number of survey respondents said that it was important that the company providing the volunteer be supportive of the project and step in if anything goes wrong.

SOLUTION **Think small.** Another way to help nonprofits get started is to offer pro bono services that they might not have considered. There is a tendency to define pro bono as consulting services, implying a high-level strategic project, but pro bono is anything that involves the use of professional services. Corporations can provide volunteers for small, discrete projects such as graphic design, web design, copywriting and others that will help the nonprofit start small and work its way, if needed, into more complex projects. Also, there is a greater likelihood of success if the project is discrete and time bound.

Nonprofit Challenge: Finding the Right Help

SOLUTION **Give them choice.** Why not require that corporate volunteers provide a resumé and make themselves available to the nonprofit for an interview? Frequently, the company chooses the volunteers and sends them in with no input from the nonprofits. The respondents were very clear that they want to have a choice with whom they work. The corporate pro bono manager can provide a list of potential volunteers and have the nonprofit make the final choice. This may not work in all cases but it is worth trying when there are multiple employees who can do the work and want to help.

SOLUTION **Screen for affinity to mission.** When there are multiple volunteers with the right skills set for the project, the company can do its own screening to narrow down the candidates. For example, the respondents said that a volunteer with an affinity for the mission tends to produce higher quality work. That is a great first question for any potential volunteer—are you familiar with the nonprofit and its mission?

Nonprofit Challenge: Finding the Time

SOLUTION **Be sensitive to the issue.** While a pro bono volunteer can't create more hours in a day, there are ways to work effectively with time-strapped nonprofits. Make sure that the corporate volunteer is sensitive to this issue and does not make unreasonable requests or make more work for the nonprofit. Asking a nonprofit for 24-hour turnaround on information needed probably is not reasonable, for example.

SOLUTION **Give them more help.** Be open to providing a different kind of help. Perhaps an administrative assistant could be deployed on-site to help with information gathering or other tasks the nonprofit needs done in support of the pro bono engagement. Or provide funds for additional personnel, such as a temp, for a defined time that would free up staff members.

Nonprofit Challenge: Keeping the Project on Track

`SOLUTION` **Allow the volunteer to do pro bono during the workday.** Often the reason why projects derail is the availability of the volunteer. Too frequently the volunteer can only meet in the evenings and weekends, making the workday longer for stretched-thin nonprofit staff. As providers of volunteers, companies can make it easier on everyone if they support workday volunteering. Some do have paid-time-off policies that volunteers can use for pro bono. Even if they don't, if companies are going to have a pro bono program, they need to show their support by allowing their employees to attend meetings at the nonprofit during the day and to make time in their workday to complete pro bono work. Having to work "off the side of the desk" creates additional stress on the volunteer and often leads to missed deadlines or incomplete deliverables.

Nonprofit Challenge: Funding the Implementation

`SOLUTION` **Include a grant with the pro bono project.** Depending on the project, it may make sense to include an implementation grant to ensure that the work done on both sides shows a positive return. Nonprofits complain that volunteers made recommendations and then walked away. Pro bono volunteers can not only stick around to help with implementation but can also deliver the funds that will make the implementation possible. It could be as small as printing costs for the new human resources handbook or an online advertising budget to support the new marketing plan.

In Summary

As a provider of pro bono volunteers, a company can dramatically impact the success of the project by taking a holistic view and giving all the support it can before, during and after the project.

The most important thing it can do is to provide a safe environment for employees to be dedicated volunteers. That means allowing them to work on the pro bono project during the workday without fearing repercussions. Recognition of their volunteer work is important, too, whether it is in an employee's performance review, recognized by management or in a company's communications.

For a robust pro bono program, a company will benefit from hiring a volunteer manager who focuses on pro bono and can implement some of the solutions previously mentioned. This person can also get to know the nonprofit partners better—how they work, what they need—and be more effective in choosing projects and volunteers for the organization.

To grow corporate pro bono programs, corporations should consider reaching out to their current partners, if they are not already doing so. Perhaps pro bono help is packaged with grants, when appropriate. It is an opportunity to start a conversation and talk about what the company can offer. The conversation can also begin when the company is approached about providing traditional volunteer services. "Yes, we would love to come and paint your walls and, by the way, we can also help you publicize the improvements at your facility." It's about thinking about what the company has to offer and looking to make that match.

Providing employees to nonprofits can deepen the partnership between the nonprofit and the corporation. More than just providing a grant or extra hands, the act of working together to solve a problem helps each party learn and appreciate each other. Furthermore, a corporate volunteer carries with him or her the responsibility to represent the company in its best light. It behooves the company, then, to do all it can to make sure the project is successful.

Demographic Tables

Location

Where are you located?	
Answer Options	Response Percent
Central Canada	2.3%
Eastern Canada	3.1%
Western Canada	4.5%
Quebec	0.8%
Northeast U.S	18.7%
Mid-Atlantic U.S.	9.5%
Midwest U.S.	16.7%
Southeast U.S.	3.0%
South U.S.	2.3%
Southwest U.S.	16.0%
Northwest U.S.	15.9%
Mexico	0.2%
Central/South America	0.6%
Europe	1.9%
Middle East	0.1%
Africa	1.4%
Asia	1.6%
Australia/New Zealand	1.3%

Type of Office

Do you work in the organization's headquarters or an in-country or local/satellite office?	
Answer Options	Response Percent
Headquarters	88.5%
In-country or local/satellite office	11.5%

Cause Area

What is your cause area?	
Answer Options	Response Percent
Arts, Culture, and Humanities	10.0%
Economic Development	3.3%
Education and Youth	20.6%
Environment and Animal Protection	5.0%
Health Care	7.8%
Housing and Homelessness	8.6%
Human Services	13.8%
Jobs, Training and Employment	2.8%
Legal assistance	2.1%
Management and Technical Assistance	0.9%
Microfinance Institution	1.0%
Women's issues	1.4%
Other	22.9%

Organization Size

What is the approximate size of your organization's operating budget at your location?	
Answer Options	Response Percent
$1 - $249,999	20.3%
$250,000 - $499,999	9.3%
$500,000 - $749,999	7.5%
$750,000 - $999,999	7.4%
$1,000,000 - $1,499,999	11.6%
$1,500,000 - $1,999,999	6.7%
$2,000,000 and up	37.3%

How many paid employees does your organization have at your location?	
Answer Options	Response Percent
0	8.3%
1-5	23.8%
6-10	13.9%
11-20	15.9%
21-50	15.0%
50 -100	10.5%
100+	12.7%

Appendix 1: Online Pro Bono Resources

Common Impact

Common Impact designs, builds and implements corporate pro bono programs designed to build the capacity of the nonprofit sector and create long-lasting effective cross-sector partnerships. The organization supplies resources that support nonprofits, volunteers and companies overcome barriers to skills-based volunteering.

Some of those resources include "Pro Bono Perspectives" (http://probonoperspectives.org/), a comprehensive online resource that helps individuals across sectors identify the tools and resources that they need to implement an effective pro bono program. The site includes a nonprofit organizational readiness assessment, (http://www.surveygizmo.com/s3/2291442/Organizational-Readiness-Wizard) as well as information for corporations on talent development (http://commonimpact.org/pdf/Talent_Development_Toolkit.pdf) and the "big idea" behind skills-based volunteering. (http://commonimpact.org/pdf/The_Big_Idea.pdf)

Readiness Roadmap

Capital One, Points of Light, Common Impact and Taproot collaborated on a Nonprofit Readiness Roadmap to help nonprofits understand what it means to be "ready" to take on pro bono help. It also addresses the phases of a pro bono project. Many of Common Impact's tools also appear on the Readiness Roadmap website, including a project evaluation tool.
http://www.readinessroadmap.org/

Taproot Foundation

Taproot's programs connect nonprofit and social change organizations to business professionals who volunteer their expertise to deliver pro bono service. It also works with companies to design and implement pro bono employee engagement programs. The organization convenes global pro bono leaders with Pro Bono Week and the Pro Bono Summit, and publishes research and thought leadership to advance the pro bono movement.

Taproot has two online tools to help nonprofits take advantage of pro bono:
- Taproot+: An online matching system that provides nonprofits with a platform to secure pro bono resources from trained pro bono consultants via project requests https://www.taprootplus.org/
- DIY Web Tools: Step-by-step resources on how to use pro bono. Taproot's tools walk the nonprofit through the pro bono process, from defining and scoping a project to scaling pro bono as an ongoing resource for the organization. http://www.taprootfoundation.org/get-probono/be-powered-pro-bono/provider-finder

Points of Light/Billion+ Change

Points of Light (POL) helps nonprofits find volunteers and equips them with the skills and resources they need to use volunteers more effectively. POL has a number of resources on its website, including:
- An assessment to determine how prepared a nonprofit is to engage skills-based volunteers (www.pointsoflight.org/SBVreadiness)
- Skills-based volunteering case studies that demonstrate how effective these project can be (www.pointsoflight.org/corporate-institute/resources/skills-based-volunteering).

Nonprofits can also post projects at AllForGood, a hub for volunteerism and community service on the Internet, and a service of Points of Light.

Points of Light manages A Billion+ Change, a national campaign transforming business culture so that all companies in America will unleash the talent and expertise of their people in skills-based and pro bono service. www.abillionpluschange.org/resources

LBG Associates

LBG Associates published a white paper on nonprofit readiness, which looks at the state of nonprofit readiness with respect to pro bono volunteerism and outlines the conditions under which a pro bono project is more likely to succeed. It is a good companion piece to the present study. For a free copy, contact LBG Associates at 203-325-3154 or linda@lbg-associates.com.

Volunteer Canada

Volunteer Canada's Skills-Plus tool helps nonprofit organizations to structure volunteer opportunities that access workplace skills and competencies. The tool also helps workplaces support employee volunteers to meet their community goals. Skills-Plus includes a competency matrix and volunteer opportunity examples. There are also articles and other resources, such as Skills-Plus Playing Cards that help nonprofits brainstorm skills-based volunteer opportunities.
http://volunteer.ca/sbv

Bénévoles d'affaires

Bénévoles d'affaires connects businesses in Canada with nonprofits that need skills-based and pro bono help. Based in Montreal, the organization's website is in French (www.benevolesdaffaires.org) but the organization is mentioned in an article in English on the Volunteer Canada website at http://volunteer.ca/institute/primer. For more information on its programs for business, see http://www.benevolesdaffaires.org/images/files/Brochure_BA_pour_entreprises.pdf.

Volunteer Match

VolunteerMatch connects volunteers with nonprofits on its website and helps corporate clients recruit and manage employee volunteers. Nonprofits can post traditional and skills-based projects on the website (http://www.volunteermatch.org/nonprofits/#). The organization frequently addresses pro bono volunteering through the VolunteerMatch Learning Center http://learn.volunteermatch.org/). The Learning Center contains links to the latest trainings on volunteer management, including skills-based and pro bono volunteering. VolunteerMatch also recently published a book called Volunteer Engagement 2.0, which has a chapter written by Taproot Foundation. Information on the book can be found here: http://learn.volunteermatch.org/book

LinkedIn For Good

LinkedIn for Good is designed for nonprofits to help them find the skilled talent they need. The site contains resources for nonprofits from Volunteer Match, Taproot, Catchafire and BoardSource. The professional networking site also allows nonprofits to search for potential volunteers based on skills and whether the LinkedIn member has expressed interest in skills-based volunteering. https://linkedinforgood.linkedin.com/

Catchafire

Catchafire is a skills-based volunteer platform connecting nonprofits in need with volunteers that want to support their work. With 80+ pre-scoped projects, organizations can access talent in areas like fundraising, marketing, technology, and operations. Catchafire provides organizations support in selecting projects, finding volunteers, and managing their volunteer relationship to project completion. There is a nominal fee for membership but the nonprofits can request a free needs assessment by phone. https://www.catchafire.org/project_menu/

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In this series of three white papers, LBG Associates explores three crucial building blocks—the three "R"s—of an employee volunteer program:

      • Recruiting   • Recognition   • Reporting

We surveyed 47 major U.S. companies to find out what is working in each of these areas TODAY. These white papers will show you how to build (or renovate) your EVP for maximum success. Together they will answer these crucial questions:
- What is the most effective way to get employees to volunteer for the FIRST TIME?
- What makes them want to volunteer again?
- What recognition tactics really get employees excited about volunteering?
- What incentives increase reporting volunteer hours the most?
- How should I structure my Dollars for Doers program for maximum success?

Secrets to Creating High-Impact Strategic Partnerships
LBG Associates defines a strategic partnership as a mutually beneficial relationship and investment of resources between a nonprofit and a company that results in a community involvement program that aligned with the company's corporate citizenship strategy, brand and business goals.

Is having a strategic partnership for you? The answer is most likely YES. Even with limited resources, CI professionals can produce programs that make positive changes in the community and build business value.

This report lays out LBG Associates' recommendations for building strategic partnerships, outlines the key steps to follow, and and provides best practices to enhance success. The report includes 24 case studies of successful partnerships with insight from both the corporations and their nonprofit partners. Learn from IBM, Moody''s, American Express, AMD, Seventh Generation, Verizon, Western Union, Merck and 16 others about the challenges they faced and how they overcame them.

These is no other report that can guide you through the process. The report includes the 13 Steps to Success and a checklist to guide you on the journey and help avoid missteps and mistakes.

Motivating Volunteering in Tough Times
In these tighter times, many companies are viewing employee volunteerism as a cost-effective way to continue to make an impact in their communities. But what is motivating employees to volunteer right now? If you don't know, or haven't checked in with your employees to find out, you may have some surprises in store.

We understand that there's an urgent need to help companies make crucial decisions about ways to bring their volunteer programs more in line with today's economic realities—and employees' needs and desires. This research study from LBG Associates and LBG Research Institute is designed to provide you with that help, by answering the following questions:

- Are employees more driven to volunteer during this recession, or are they so depressed that they are in a state of inertia?
- Are employees afraid to use workday-based programs, such as skills-based, pro bono, or paid time off, for fear of losing/jeopardizing their jobs?

Just what is inspiring employees to volunteer during these challenging economic times? LBG's new research report is unique in that it includes both the voice of the employee volunteer manager AND the employee. By comparing research from both groups, this study provides a much-needed and robust view of today's volunteering landscape.

The Green Effect: How Community Involvement Is Embracing Environmentalism

The Green Effect: How Community Involvement Is Embracing Environmentalism, reveals the top environmental trends and practices among 51 of today's leading corporations—and includes a unique self-diagnostic tool that helps determine if a company is a Peridot (becoming green); a Jade (green in many business and community involvement practices); or an Emerald (extremely green). It also includes eye-opening findings on perceptions of for-profit/nonprofit partnerships, based on in-depth discussions with nine green NGOs.

This report shows a wide range of research findings from the participating companies, addressing topics such as:
- Whether respondents believe being green is part of their corporate culture
- What metrics are being used to measure companies' environmental footprints
- How product design and manufacture have been greened
- How environmental practices vary among the Peridot, Jade and Emerald companies
- How charitable giving is affected by the green movement
- Median green giving levels
- The critical role employees play in promoting environmentalism
- How companies are communicating their environmental activities

The Green Effect also includes more than 25 case studies showing how research participants are "walking the talk" and executing their environmental commitments—in both operations and community involvement activities. With its landmark research findings, case studies, and proprietary self-diagnostic tool, The Green Effect: How Community Involvement Is Embracing Environmentalism is a much needed, one-of-a-kind resource guide for the next step in community involvement: going green.

Trends & Best Practices in Corporate Community Involvement

Trends & Best Practices in Corporate Community Involvement presents the extensive findings of a comprehensive survey of the community involvement programs of 35 major U.S. corporations. Originally designed to update LBG Associates' 1998 Best Practices in Corporate Community Relations report, this landmark community involvement study goes well beyond the 1998 report, and is unprecedented in its scope, detail and analysis.

The report examines the following topics in detail:
- The business case for corporate citizenship
- Structure and governance of the CI department and the foundation
- Charitable giving program types and budgets
- Employee-directed giving
- Employee volunteerism
- Sponsorships, memberships and signature programs
- Disaster relief
- Measurement and evaluation
- Communication

Each section of this report comprises three sections:
- Overview: Provides a broad look at the topic and information about the section's contents.
- Survey Results: Details the statistical findings derived from the responses to the survey questions for each topic area, including numerous charts and tables that can be easily used for benchmarking a company in very specific community involvement areas.
- Trends & Best Practices: Highlights the significant trends revealed by the survey participants' responses, plus provides recommended best practices.

With its 130-plus pages of benchmarking data, trend analysis and best practice guidelines, this report is more than a reflection of the state of community relations: It is a tool for companies looking to gauge their CI performance, and a reference that can help elevate community involvement/community relations activities to an even higher level.

Global Community Involvement

As Corporate America becomes more international in scope and the focus on philanthropy and corporate citizenship grows, many companies are seeking assistance in developing a global community involvement program or enhancing/modifying their U.S. program for expansion overseas. This research report is designed to provide that assistance.

Global Community Involvement examines the global CI practices of more than 20 U.S. multinationals (MNCs), 40 of their overseas locations in 15 countries, and the practices of foreign companies. The study covers a number of community involvement areas and includes details on:
- The business case for community involvement
- CI department structure
- Charitable giving
- Employee volunteerism
- Sponsorships and signature programs
- Disaster relief
- Measurement and evaluation
- Communication

In addition, more than 20 pages are devoted to detailing the current tax legislation and the philanthropic and volunteer activities in a number of countries--including Australia, China, India, Poland and many others.

Global Community Involvement is an invaluable resource for anyone interested in building or sustaining a global CI program. The findings of this study have resulted in the development of a best-in-class paradigm for global giving that will help companies deal with the complex challenges involved in developing a global CI program.

The Standards of Excellence for Corporate Volunteer Programs

The Standards are the result of over four years of intense research and have been compiled with input from hundreds of community relations professionals, corporate senior executives and non-profit leaders. Comprehensive, yet flexible, The Standards serve as a framework that enable companies to build highly successful volunteer programs; programs that achieve a high level of employee participation and generate specific benefits for companies, their employees and the communities in which they live and work.

The Self-Diagnostic Tool ("The Tool") allows community relations managers to evaluate their programs against The Standards.

Free Publications

To request a free publication, visit our website at www.lbg-associates.com, email us at linda@lbg-associates.com or call 203-325-3154.

Corporate Pro Bono Readiness
Wondering if your company is ready to start a pro bono program? The Nonprofit Collaborative, composed of Taproot Foundation, Common Impact, and Points of Light, asked LBG Associates to conduct a survey to assess corporate readiness for pro bono services with the intent to increase the effectiveness of these initiatives. This free report will help you evaluate whether it is time to begin a formal pro bono program and what you need to be successful in that endeavor.

Pro Bono Service: The Business Case
Research commissioned by Capital One in partnership with the Taproot Foundation and conducted by LBG Associates reveals a solid business case for pro bono service, presenting evidence of the benefits that pro bono service programs bring to companies, their employees, and nonprofits. The highlights of the findings among employees, their managers, and senior executives are presented in this free document.

Employee Engagement: Volunteerism
How are companies using volunteerism to engage employees? LBG Associates conducted a focus group on this topic at the Charities@Work conference in April 2012. This free white paper summarizes the findings and gives insight into the tactics that are getting employees out and volunteering.

Employee Engagement: Workplace & Corporate Giving
How do companies use workplace and corporate giving to engage their employees? LBG Associates conducted a focus group on this topic at the Charities@Work conference in April 2012. This free white paper summarizes the findings and gives insight into what is popular and successful right now.

Issue Briefing Disaster Relief
To help prepare your company for the full scope of disaster relief, LBG Associates has prepared this free issue briefing that provides an overview of disaster management and relief; discusses trends that we've found from our research during the past 15 years; and outlines our guidelines for disaster relief best practices.

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