



# Advancing Social Equity through Skilled Volunteering



## Pro Bono Project Guide

# Make the most of your pro bono project!

Taproot has facilitated tens of thousands of impactful partnerships between social good organizations and skilled professionals over the past 20 years. We've learned more than a few lessons along the way! This guide is embedded with that knowledge, fueled by the experiences of our incredible community members. Use this framework throughout your pro bono project to help you run a smooth, efficient, and effective partnership.

All partnerships between a skills-based volunteer and a social good organization will be different, but in general, most pro bono projects follow the 5-phase structure laid out in this guide. Flip to the end of the resource for a sample scoping document and example project scopes. And, if you're hungry for additional project management best practices, [check out our full-length presentation](#) for even more advice from Taproot staff.

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# Project Basics

## Key Principles of Pro Bono

These tenants are core to a successful partnership between a nonprofit and skilled volunteer. Keep them in mind throughout your Taproot Plus Project (and any partnerships you enter into outside of Taproot!). Remember to follow **Taproot's Golden Rule**: Treat every pro bono partnership like it's a paid relationship. This ensures accountability and best outcomes for both the social good organization and their skilled volunteers.



### For Nonprofits

- **Know and define your needs.** It's important to clarify your scope of work, and then stick to it!
- **Get the right resource for the right job.** It's tempting to take help from anyone who volunteers, but a mismatch between project and skills will take the project off track, fast.
- **Be realistic about deadlines.** This project will require resources from you too, so plan ahead. Support from skilled volunteers isn't recommended for any task with an urgent due date.
- **Act like a paying client.** Prepare for this partnership internally just like you're onboarding a paid staff member or contractor. It's the only way a project can run smoothly, and skilled volunteers want to know you're invested in this work.
- **Learning goes both ways.** You'll learn from your skilled volunteer's expertise but remember that you have a lot to teach them about your organization, your sector, and working with nonprofits.

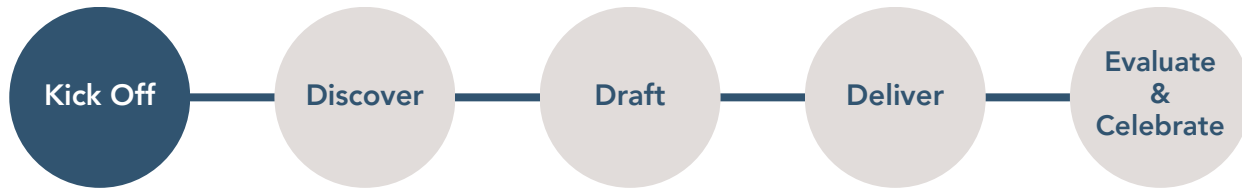


### For Volunteers

- **Seek to understand, then to be understood.** Take time to get to know your partner and how they work before offering new ideas and advice.
- **Be aware of consulting time.** Even small tasks can take longer than you expect, so stick to the dates you set and be communicative about timelines.
- **Pro bono isn't the place to learn new professional skills.** Instead, stretch skills and experiences you already have. Trust us, you'll find great growth opportunities from serving a new sector and collaborating with a different team!
- **One size doesn't fit all.** Implementation is key to success. Don't build a Fortune 500 solution unless the nonprofit truly needs it.

# Manage Pro Bono

## Phase 1: Kick Off



### What is the goal of this phase?

Kickoff the project! During this phase, you'll make sure that everyone involved understands what will be accomplished during your collaboration.

### What happens during this phase?



For the nonprofit:

- Host a kickoff call.
- Agree with your skilled volunteer on the scope of work and timeline.
- Share information about your organization and answer background questions.
- Agree to communications preferences. When and how will you communicate with each other?



For the volunteer:

- Participate in a kickoff meeting.
- Agree with the nonprofit on a scope of work and timeline.
- Come prepared with questions for the nonprofit and your ideas for moving forward on the partnership.
- Agree to communications preferences. When and how will you communicate with each other?





## Taproot Tip!

Use this checklist to prepare key materials that will help your pro bono provider become familiar with your organization and get started with the engagement.

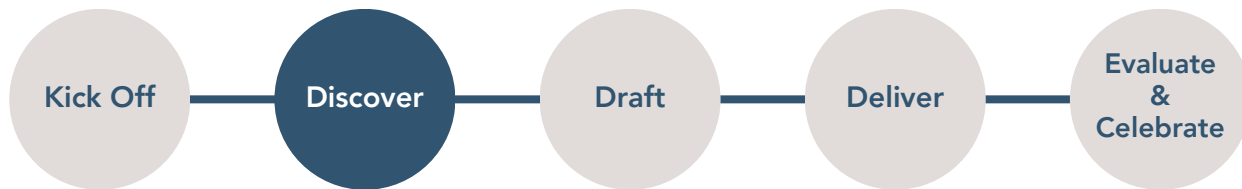
- Mission, vision, and values statement
- Current strategic plan (if available)
- Organizational chart
- List of board of directors
- Key dates that may affect a project timeline
- List of key staff and their time availability for the project
- Financial statements
- Marketing materials (brochure, newsletter, annual report, etc.)
- Background on your organization's field or issue area
- Get out your calendars and try to schedule meetings and check-ins in advance. This will help provide structure to the project, avoid communication issues, and maintain your timeline.

### Reminder!

- Not all of these items will be relevant for every project, but these are some of the most common.
- Find scoping document at the back of this guide along with examples of filled out scopes!

# Manage Pro Bono

## Phase 2: Discover



### What is the goal of this phase?

The skilled volunteer gets to know the social good organization and mission, then conducts any additional research to gather appropriate background for the project.

### What happens during this phase?



For the nonprofit:

- Participate in and facilitate interviews.
- Gather and deliver materials as requested by skilled volunteer.



For the volunteer:

- Conduct background research on the organization with focus on project area.
- Conduct interviews when appropriate.

#### Examples of general background to share with pro bono provider:

- Press Kit
- Strategic Plan
- Organizational Chart
- Market Research
- Visual Identity/ Logo/ Style Guide
- Marketing Plan
- Board Meeting Minutes
- Program Evaluation or Dashboard

#### Types of discovery a pro bono provider might do:

- Trainings on key issue areas
- Review research or data from prior projects
- Environmental scan
- Stakeholder interviews
- Standard volunteer employee/ onboarding
- Review printed or published materials
- Exploration of hardware, software, or organizational systems



## Taproot Tip!

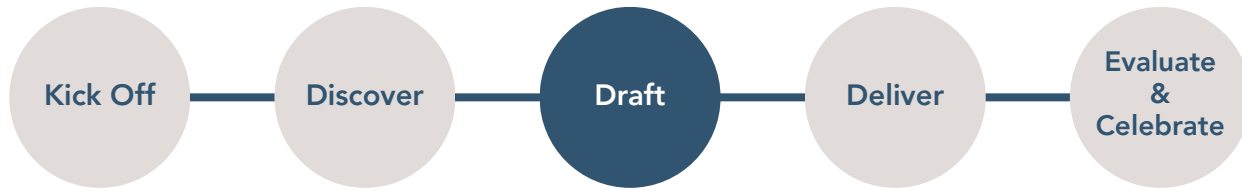
Scheduling and conducting interviews can be time consuming. Provide your skilled volunteer with contact information and facilitate interviews whenever possible.

### Reminder!

Your volunteer partner will be able to work more effectively (and with greater passion for your mission!) if you invest in their onboarding. Take time to introduce skilled volunteers to your organization's vision, the programs you run, the community members you serve, and the amazing people on your team! Those personal connections and learning moments can make all the difference.

# Manage Pro Bono

## Phase 3: Draft



### What is the goal of this phase?

Once you’ve agreed on what the discovery results mean and have revised or confirmed the direction of the rest of the project, your consultant team will hunker down to actually “do the work.” We call this phase drafting meaning the actual creation, development, or writing of the deliverable or end product.

### What happens during this phase?



For the nonprofit:

- Give quick and direct feedback on document drafts.
- Coordinate feedback from key internal players to streamline this phase.



For the volunteer:

- Prepare draft option/s of final deliverable/s.
- Create room, but with boundaries, to receive feedback from nonprofit.

### What does good feedback look like?

- Comes in the form of questions rather than solutions
- Addresses things that can be changed, improved, or adapted
- Informed by multiple perspectives not just your own
- Is shared for consideration, but with final action upon by both parties





## Taproot Tip!

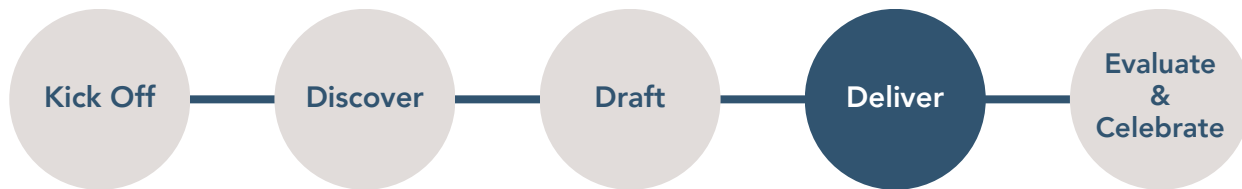
Avoid 'scope creep' and watch the timeline when you work on revisions. It's easy to keep going on and on...and on. If you identify additional needs throughout the course of your project, those could be a great fit another Taproot Plus Project! Keep in mind that there is no limit on the number of pro bono requests organizations can make through [your Taproot account](#).

### Reminder!

Nonprofits should act like paying clients. They should provide honest and clear feedback on the pro bono provider's work and research. You will both be much happier with the final product!

# Manage Pro Bono

## Phase 4: Deliver



### What is the goal of this phase?

Your skilled volunteer submits the final deliverable/s as agreed upon in the scope of work, along with any training or implementation guidelines associated with the deliverable.

### What happens during this phase?



For the nonprofit:

- Provide feedback on the final deliverable.
- Ask the pro bono provider any concluding questions you have on the final deliverable.
- Key staff are available to receive training or guidance for implementation.
- Create a plan outlining your next steps. This could include making additional Taproot volunteer requests for implementation or maintenance support.



For the volunteer:

- Finalize and present deliverable/s.
- Assist nonprofit in identifying next steps to implement deliverable.
- Perform training on deliverable when appropriate.

### Delivery and implementation checklist:

- Delivered feedback in a timely manner and agreed on the final version of the deliverable.
- Scheduled trainings for key staff or board members.
- Updated all staff members on expected implementation.
- Updated board members on the expected implementation.
- Decided if the skilled volunteer needs to be involved in implementation.
- Reviewed any remaining activities and determined their end dates.



## Taproot Tip!

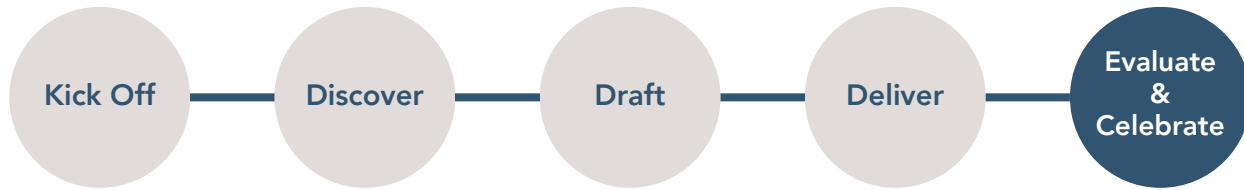
Keep your board informed by asking a board representative or two to participate in the presentation of the final deliverable.

### **Reminder!**

Watch for “scope creep.” Make sure the final presentation doesn’t turn into a strategic planning session.

# Manage Pro Bono

## Phase 5: Evaluate & Celebrate



### What is the goal of this phase?

Wrap up your partnership! Celebrate, thank your pro bono provider, evaluate the engagement, and start planning for your next steps.

### What happens during this phase?



For the nonprofit:

- Plan a way to celebrate and thank your skilled volunteer.
- Evaluate the success of the partnership.
- Complete the [Taproot Plus end-of-project survey](#).



For the volunteer:

- Provide feedback to the nonprofit on the partnership.
- Clarify availability to answer unexpected questions that arise after the engagement ends.
- Complete the [Taproot Plus end-of-project survey](#).

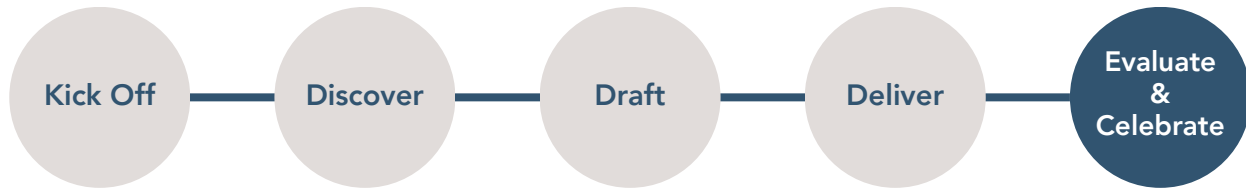


### Ways to Celebrate!

- Give away swag with your logo on it.
- Invite to special events (galas, showcases, etc.).
- Recognize pro bono work at a board or staff meeting.
- Shout out the skilled volunteer in your newsletter or blog.
- Act as a professional reference during their next job search.
- Recognize with a 'Volunteer of the Month/Year' award.
- Offer additional ways to get involved (board membership, more pro bono, etc.).

# Manage Pro Bono

## Phase 5: Evaluate & Celebrate



### Evaluate your pro bono engagement

Use these questions to help evaluate the success of your engagement and identify opportunities for improving your next pro bono project.

#### How impactful was the partnership?

- Did we reach the goals and milestones we set at the beginning of the project?
- Is the final deliverable implementable and sustainable?
- Will the final deliverable help us achieve our mission? How?

#### How successfully was the engagement executed?

- How satisfied were the individuals involved in the engagement?
- Was the project completed on time?
- Were we able to stay within the agreed upon scope?

#### What can we improve for future pro bono projects?

- What worked well during this engagement? What should we replicate in future projects?
- What challenges did we face, and how did we overcome them? What should we do differently next time?





## Taproot Tip!

What goals and milestones did you establish at the beginning of the project? Use these to help measure the success of your partnership.

### **Reminder!**

Good evaluation documents what went well and what needs improvement. Focusing on positive and negative feedback will set both the volunteer and nonprofit up for success in any future pro bono partnerships.

### **Tip!**

Surveys, one on one interviews, and group discussions are great methods for getting feedback on your engagement.

# Scoping Worksheet

Use this form to develop a scope of work for your project. It's important both parties agree to the scope and stick to it throughout the pro bono partnership.

## 1. In Scope

What will this project accomplish? List project deliverables.

(For example, a design project may include the following deliverables: 3 discovery interviews, 2 brochure design options, and a finalized, print-ready brochure design.)

1.
2.
3.
4.
5.

# Scoping Worksheet

Use this form to develop a scope of work for your project. It's important both parties agree to the scope and stick to it throughout the pro bono partnership.

## 2. Out of Scope

Describe what won't be accomplished.

(In the case of our design project example, out-of-scope activities could include: focus groups, logo revision, brand strategy, etc.)

1.
2.
3.
4.
5.

# Scoping Worksheet

Use this form to develop a scope of work for your project. It's important both parties agree to the scope and stick to it throughout the pro bono partnership.

### 3. Logistics

Plan out how the project will come to life.

What is the deadline for project completion?

What resources will be required to complete the project?

Who from the organization needs to be involved? Who is the decision-maker?

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## Pro Bono Project Guide Wrap Up

We hope you found this guide helpful as you progressed through your pro bono partnership. Remember to keep in touch, Taproot is always here to help! Feel free to reach out to our help desk support team at [help@taprootfoundation.org](mailto:help@taprootfoundation.org).

### About Taproot

Taproot helps mission-driven organizations amplify their impact by mobilizing skilled volunteers to advance resource equity. Since 2001, our community has served over 19,000 social change organizations and provided almost 2 million hours of service worth over \$300 million. By ensuring nonprofits have access to skilled resources at no cost, we facilitate HR, finance, marketing, and strategy projects that can help them achieve their mission. Volunteers get to support causes they care about in meaningful ways. And the corporations we help to develop skilled volunteering programs boost employee engagement and support their local communities and causes their teams care about.