Everyone Ready®

Achieve more when *everyone's* ready for volunteers

FROM ENERG!ZE

Pro Bono Service
Get Ready for the Highly-Skilled Volunteer

By David Warshaw

Self-Instruction Guide
for Individuals and Teams

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More Questions?

Ask the Trainer Online

See page 22 for details.

IDEAL AUDIENCE FOR THIS GUIDE

This Guide is ideal for board members, executives and staff members in organizations seeking to start or expand the engagement of pro bono volunteers within their operations.

LEARNING OBJECTIVES

After reading the Guide and trying the exercises or discussions, participants will be able to:

- Understand today's workplace trends that are driving up the numbers of volunteers seeking pro bono volunteer opportunities.

- Identify various models of pro bono volunteering created via the growth of intermediary organizations, the expansion of corporate programs and increased grass-roots activity.

- Identify steps organizations can take to test their readiness to involve pro bono volunteers.

- Begin to develop plans to start or expand involving pro bono volunteers effectively.

HOW TO USE THESE SELF-INSTRUCTION GUIDES

Everyone Ready® selects a several-page chapter, excerpt, or article from a respected source, often fresh material just published or newly revised, to become the "Featured Reading" on the chosen topic for each Self-Instruction Guide.

Read or complete each section of the Guide *in the sequence presented.* The order of the elements matters to the success of the learning experience. First, you will find preparatory information that sets the topic into context and a pre-reading self-assessment. Then the Featured Reading(s) are presented.

The Additional Perspectives following the Featured Reading(s) updates and expands the original writing and has been developed specifically for *Everyone Ready* participants. In addition, further resources, ways to test your understanding, and a post-reading self-assessment are included.

- **Recommendation:** Consider forming a study group or learning team so that you benefit from the synergy of discussing the material with others in your program. Sharing your ideas aloud reinforces the learning, encourages creativity (yours and others'), and lays the groundwork for actually implementing many of the ideas developed.

PRE-READING ASSESSMENT

The questions below will allow you to think about how your organization engages pro bono or highly-skilled volunteers. Answering these before starting this Guide will help provide focus on the information to come.

1. How do *you* define pro bono or highly-skilled volunteers?

2. List THREE potentially positive outcomes from engaging pro bono volunteers in your organization.

   a. _____

   b. _____

   c. _____

3. List THREE potential challenges that would need to be overcome for your organization to involve pro bono volunteers effectively.

   a. _____

   b. _____

   c. _____

(Continued on next page)

Pre-reading Assessment *(continued)*

4. Each pair of statements in the table below offers two extremes regarding the engagement of pro bono volunteers in an organization's operation, one negative (scored as 1 on a five-point scale) and one positive (scored as 5 on a five-point scale). Your organization's performance may be at these extremes, or somewhere between. For each pair, rate your organization's performance from 1 to 5 in the last column.

Paired Attributes *Your organization's performance on each continuum may fall at or somewhere between the extremes.*		Your Organization's Score
Negative Extreme (1)	Positive Extreme (5)	*Indicate your organization's score, on scale of 1 to 5.*
Our organization has had no successful engagements of pro bono volunteers.	Our organization has had many successful engagements of pro bono volunteers.	
Our organization has done nothing to create a comprehensive plan to incorporate pro bono volunteers in our operations.	Our organization has a well-defined strategy to incorporate pro bono volunteers in our operations.	
Pro bono volunteers are likely to be viewed negatively by our staff and current volunteers.	Pro bono volunteers are likely to be welcomed by our staff and current volunteers.	
There are no positions or projects in our organization appropriate for a pro bono volunteer.	There are many positions or projects in our organization appropriate for a pro bono volunteer.	
A volunteer coming to our organization offering to provide pro bono service would become frustrated with the experience.	A volunteer coming to our organization offering to provide pro bono service would have a terrific experience.	
There has been no integrated discussion about pro bono volunteers involving current volunteers, staff, senior management and the board of directors.	Discussions about pro bono volunteers in our organization have integrated views from current volunteers, staff, senior management and the board of directors.	

UNDERLYING PRINCIPLES

What if your organization were offered – for free – professional services that would improve the capacity to manage your business and deliver more efficient services to your clientele? Would you jump at the opportunity, or would you hang back wondering about the risks of giving up control of critical functions? Would you gather a multi-level team to analyze the potential or assign the decision to the already over-worked manager of volunteers? Would you choose to accept the offer on a one-off, ad hoc basis, or seek to develop a strategic response to the potential for many such offers?

For the last several years, these and other related questions have been at the top of the list in the volunteer literature, at volunteer conferences and where ever nonprofit leaders gather as attention has increasingly focused on what is variously referred to as "skills-based," "highly skilled," or "pro bono" volunteering.

But, as they say: "Is there any *there* there?" Is pro bono volunteering a trend that is revolutionizing nonprofit effectiveness, as some advocates believe? Or, will the cynics' view prevail that this is just another "flavor-of-the-month" that will flash and then whither? The truth is probably someplace in the middle. Pro bono service has a long history in many professions and is hardly "new." It is just getting more attention right now because well-educated Baby Boomers are reaching retirement age, corporations are seeking more return-on-investment from employee volunteering, and smart nonprofits are recognizing that designing pro bono volunteer roles can attract high caliber skills normally unobtainable to them.

No matter how this trend has come into the limelight or how long it will last, one thing is certain:

> How **front line** organizations benefit from increased interest by pro bono and highly-skilled volunteers will depend on the diligence with which boards, management teams, staff members and current volunteers work **collaboratively**.

In general, the terms "skills-based" and "pro bono" volunteering refer to engagements done on behalf of a nonprofit or public agency without charge (or at greatly reduced rate) where volunteers perform work similar to what they do at their places of employment, or for which they have received professional training. Some people use the terms synonymously. Others suggest a continuum with skills-based engagement referring to any effort that leverages professional talent (no matter how casually), and pro bono engagements those where the primary objective is to increase the capacity and sustainability of the organization itself. On the pro bono side of the scale, engagements often look similar to paid consultancies – without the pay, of course – and a distinction is also made between this type of volunteering and that which provides direct-service help on behalf of clients.

So, for example, I'd say that an accountant who does tax returns for *the clients* of a senior center (a direct-service engagement) is engaged in skills-based volunteering. The accountant completing the audit for an *agency* at no charge would be serving in a pro bono capacity.

For the purposes of this Guide, we will concentrate on the "pro bono" end of the spectrum, and the discussion will focus more on agency capacity building than on direct service volunteering.

The first underlying principle for this Guide is that *all* volunteers have "skills." The best volunteer efforts achieve success by recognizing these skills and engaging them to achieve mission goals.

It should be of some comfort to know, therefore, that functional knowledge about recruiting, accepting, orienting, assigning, leading and supervising, recognizing, and retaining volunteers in general can all be applied to engaging pro bono volunteers.

A second underlying principle is this: Because pro bono volunteering will more likely be focused on operational projects or strategic decision-making work rather than direct service to the community or clientele, a pro bono engagement initiative needs to involve all levels of staff within the organization and may not be under the sole direction of the volunteer program manager. Management issues or project possibilities – and decisions on how to address them – may first come to the attention of the executive director, or a key functional staff leader or, if serious enough, the board of directors. The volunteer program manager's seat at the table is vital, however, since that person brings his or her experience and knowledge about the effective involvement of volunteers of all sorts.

A final underlying principle is that the motives of volunteers seeking pro bono assignments might differ from volunteers whose tasks fall into either the administrative or direct-service categories.

All volunteers want to "do good," of course, and this discussion isn't meant to over-value pro bono volunteering or undervalue more traditional volunteering (so vital to many organizations' delivery of services). Often, however, pro bono volunteers are coming from a "different place," and seeking satisfaction in different ways than traditional volunteers. Volunteers in the pro bono ranks will often be:

- People who have attained a certain status – university professors, company presidents or top managers, etc. – who now want to volunteer for an organization's cause by specifically applying the professional knowledge learned over a long career to help address management problems in a new arena.

- Young people with newly-minted degrees – often a post-bachelor professional degree, such as an MBA – who are anxious to test their knowledge and ability in service to a cause in which they believe.

- Employees from corporations that are expanding workplace volunteer programs from more traditional hands-on, team building efforts to include skills-based and pro bono efforts.

- People with technical skills which – because such are not needed daily – may not be found on the staff of a nonprofit or public agency, such as Web design, marketing, information technology management, etc.

- Social entrepreneurs who may want to innovate new ways of tackling an issue.

Of course, we shouldn't assume that all people in these categories want to *be* pro bono volunteers. Many professionals want to do something completely different in their volunteer life from their working life. If a lawyer wants to volunteer with her dog in a hospital's canine therapy program, she should certainly be applauded. We simply would not consider that pro bono service.

In summary, as you move forward in this Guide, think how you and your team will meet the challenges of applying and adjusting the best practices of volunteer management for all volunteers to the specific motivations and skills of pro bono time donors, and the needs of your organization.

THINGS TO THINK ABOUT AS YOU READ

The Featured Reading covers some of the issues that affect how pro bono volunteers are engaged in nonprofit and government organizations. As you read it, consider the following:

1. What are the drivers behind the current interest in pro bono volunteers?

2. How does your organization currently involve pro bono volunteers – what types of engagements, what duration, and what skills?

3. How are staff expectations of pro bono volunteers (in terms of training, managing, recognizing, etc.) different from those of traditional volunteers?

4. What are some different models for engaging pro bono volunteers?

5. What will it take for your organization to develop a *strategic* process for engaging pro bono volunteers (as opposed to ad hoc/opportunistic arrangements)?

FEATURED READING

"Get on Board the Pro Bono Express"
By David Warshaw
Adapted and updated (2012) for this Guide from an article published in e-Volunteerism: The Electronic Journal of the Volunteer Community, *Volume X, No. 2, January 2010.*

There's a huge train leaving the station. Like a freight pulling miles of coal hoppers to provide power for the nation's electrical grid, it's loaded with resources that many say have the potential to fire a capacity building revolution in the nonprofit/government organization service "industry."

Let's call it "The Pro Bono Express*." Pro Bono* is the latest buzzword whenever folks gather to talk about volunteerism and service in the United States. Highly-skilled volunteers are not a new phenomenon, but the current twist is that for-profit corporations, especially, are seeking to offer the expertise of their employees in strategic ways that make a difference to the community.

But, what's powering this train? What is it carrying? Can the promise be delivered? And, why are some nonprofits and government organizations already on board and others concerned they'll be left waving at the station? Let's start exploring these questions by making sure we're using the same language.

Defining the Term

A simplified definition of *pro bono volunteering* is that it involves people applying what they do professionally – what they normally get paid to do – free of charge to serve a nonprofit or public agency. There's a continuum within the practice with activity ranging from the more casual application of skills in direct service volunteer roles – such as an information technology (IT) professional teaching about computers for a couple of hours a week to students in an after-school program – to highly formal engagements structured like a paid consultancy and targeted more toward building management capacity. If that same IT professional instead volunteered to create a new donor database, install it and train staff to run it, that service would fit the more rigorous end of the pro bono scale.

What is *not* considered pro bono service is if the IT person chooses to volunteer in a role unconnected to his or her professional skills, such as serving meals at a shelter or giving tours in a museum. While certainly laudable and important, because the volunteer's paid-work expertise is not the focal point, it is not pro bono service.

The *Nonprofit Readiness Toolkit for Pro Bono Volunteering* produced in July 2009 by the Corporation for National and Community Service puts it this way: "In most nonprofit organizations, serving on the Board is a leadership role; consultants are about expertise; and traditional volunteers provide direct service or administrative support."[1] While there are obvious overlaps and exceptions to these categories – and one can challenge the assumptions behind the definitions – much of the excitement in the field today comes when volunteers' professional expertise is applied in a consultative role to help improve an organization's management capability, or to provide specific time-defined efforts that result in a tangible deliverable. This is where the concept of *pro bono publico* (Latin meaning "for the public good") is beginning to build critical mass. While the phrase is drawn from the legal establishment, we are seeing professional expertise being donated more broadly in such functional areas as marketing, human resources, information technology, finance and more.[2]

While the trend is front and center in the United States, there is increased international interest in pro bono service, as well. This is partly the result of U.S. multi-national companies incorporating the concept into their global programs, but volunteer leaders in the UK, Australia and New Zealand, to name a few other countries, have reported growing interest and a variety of examples in their countries as well.[3]

Powering the Engine of Pro Bono Service

Several key trends are powering the pro bono movement. First among these is the demographic heft of two huge cohorts: the Baby Boomers and the Millennials.

Social scientists have studied the Boomer generation for decades as it has traveled through society like a pig in a python, first swelling school enrollments at all levels, then creating challenges for workforce engagement and now increasing the ranks (current economy notwithstanding) of the recently, but still active, retirees at the rate of 10,000 a day in the United States alone.[4] After careers running things, many in this group are hoping to "give back" in ways that fully utilize their professional skills.

Millennials, also called Generation Y or the Echo Boom, usually defined as those born from the mid-1970s to the 1990s, are the Boomers' kids, a group almost as large as their parents' is.[5] Fully wired, Facebooked, YouTubed, Twittered and otherwise socially networked, they have grown up in many locales with "service" as an educational requirement. They believe in the power of the many, each doing small things to achieve great goals collectively. And, they are coming into the workforce (if they can find jobs) with an expectation that their employers will provide opportunities for them to contribute beyond the bottom line to help solve social problems.

Certainly not all of either cohort is interested in the pro bono experience, and members of other generations play in this game also. But given sheer size – in the U.S., one estimate counts 72 million Boomers and 60 million Millennials – even a small fraction seeking to engage as pro bono professionals is a heck-of-a-lot of people. The 2008 recession and subsequent years of slow economic growth have also encouraged many in these populations – and recent college grads as well – to seek volunteer roles that would keep their professional skills sharp, avoid resume gaps and create opportunities to network in the job market.

A second trend is the maturation of employee volunteerism. A trickle of programs begun in the 1980s, mostly in the largest U.S.-based multinational corporations, has become the norm across a large swath of businesses of all sizes around the world. More and more, employee volunteerism is coming under the broader corporate social responsibility umbrella with strategic business goals, formalized management, and strong links to the company's philanthropic initiatives.

Seeking greater sophistication in program content, driven in part by employee expectations and the desire to be deeper and more substantial partners with the nonprofit community, an increasing number of companies are layering pro bono concepts onto their more traditional hands-on, team-building, grassroots approach to community engagement. Some companies are also starting to view donations of professional time in the same way they do cash-based philanthropy: a way of giving value that goes beyond grants and contributions.

One manifestation of this is the "A Billion + Change" campaign. Launched by the Corporation for National and Community Service in 2008 and now housed and managed by the Points of Light Institute, the goal of this initiative is to leverage management talent from across the U.S. business community on behalf of nonprofit organizations. As of the spring of 2012, some 200 companies had signed on to the program with a promise of collectively delivering more than $1.8 billion worth of professional volunteering services to help build nonprofit capacity.[6]

Supply Side of the Tracks – What about Demand?

What these trends have in common is they are all working on the supply side of the pro bono "tracks." Though hard numbers are difficult to come by, many are reporting more people actively seeking volunteer opportunities in general and pro bono volunteer placements in particular.

But this raises an important question: Nonprofits may recognize that professionally skilled volunteers offer tremendous potential to help build their capacity to serve, but does the community as a whole have the infrastructure to effectively engage in large volume what is often a more intense and complicated volunteer engagement? And the question goes double for the readiness of government agencies to make use of this type of powerful volunteer service.

A commonly used metaphor for this conundrum, first articulated by Aaron Hurst, President and Founder of the Taproot Foundation, is the hourglass. The large pool of sand in the top bowl represents the increased resources and interest in doing pro bono work. Sand in the bottom suggests the number of successfully completed efforts. And then there's the constriction in the middle, a bottleneck that, Hurst suggests, forms "…because as a [nonprofit] field we don't have enough people to effectively manage pro bono engagements ensuring their successful completion."[7]

This image is born out in a June 2012 national Pro Bono Readiness Survey released by a collaborative convened by Capital One Financial Corporation and including Common Impact, Points of Light and the Taproot Foundation. The survey found that while over 66 percent of U.S. nonprofit organizations say they need pro bono services more than any other volunteer service, considerable roadblocks exist that are preventing this resource from being used more effectively. Among these are:

- Being able to select projects with outcomes that can be managed long-term
- Finding ways to sustain the results of a project when services or solutions involve unique systems or technologies
- The need for more effective pro bono project management tools and resources

Models for Pro Bono Engagement

These findings can be viewed equally as criticism of the companies and other organizations providing pro bono talent as of the nonprofit sector's ability to use it. It is still a nascent field without a lot of clarity on who is offering what to whom, so no wonder nonprofits are having difficulty getting on board. It is perhaps instructive, therefore, to look at two models for pro bono service that are growing in scope and therefore offer opportunity for increased nonprofit engagement.

The Intermediary Model
In the intermediary model, a third party – often a nonprofit itself – works at the intersection between the volunteer (or volunteer teams) and the recipient of service. In doing so, they serve several functions that most agree are vital to success, including:

- Working with organizations to define their needs and scope specific projects.

- Recruiting and screening potential volunteers and matching individuals – or in many cases, teams of volunteers – to a nonprofit's needs on the basis of functional knowledge, availability and the more intangible personality "fit" to the host organization.

- Most vitally, helping to manage the project, keeping it on task and on schedule and helping to navigate through the almost inevitable speed bumps, deadline delays, scope creep and myriad of issues that could prevent goals from being met.

- And finally, assuring quality control and evaluating results for completed projects.

Some intermediaries have been in operation for a long time. For example, SCORE (Senior Corps of Retired Executives, http://www.score.org) has been helping small business with skilled volunteers since 1964, in partnership with the Small Business Administration of the U.S. government. Professional associations for CPAs, lawyers and the medical professions are a traditional source of pro bono talent.

And, in this new environment favoring pro bono work, new organizations are also springing up, such as:

> **Taproot Foundation:** http://www.taprootfoundation.org/
> Operates in the San Francisco Bay Area, New York City, Chicago, Washington, DC and Los Angeles. Areas of focus include: marketing, information technology, strategy management, leadership development and human resources.
>
> **Pro Bono Partnership:** http://www.probonopartner.org/
> Operates in Connecticut, New Jersey, several counties north of New York City and Atlanta. Focuses on legal matters using legal staff from area corporations as its main corps of volunteers.
>
> **Common Impact:** http://www.commonimpact.org/
> Operates in the Boston and New York City metropolitan areas. Areas of focus include: technology, marketing, human resources and financial management.
>
> **Compass DC:** http://www.compassdc.org/
> Operates in the Washington, DC area. Focuses broadly on management capacity issues in a variety of functional areas using mostly MBA-degreed volunteers.
>
> **Give an Hour:** http://www.giveanhour.org
> Recruits mental health professionals to donate their expertise to returning service men and women.

It should be noted that many volunteer centers, United Way chapters and other community-based organizations are exploring how to develop their capability to serve as pro bono intermediaries as well. And pro bono matching and management has hit the Internet with startups such as Catchafire.com and extensions from traditional online volunteer market places such as VolunteerMatch.

The Corporate Model

When asked why he targeted banks, Willie Sutton – the notorious 1930's bank robber – answered simply: "Because that's where the money is." The interest in corporate pro bono efforts has a similar reasoning. It's where lots of professionally skilled people are found.

Company pro bono activity comes in several "flavors":

- For professional service companies such as Deloitte, KPMG and others of their ilk, consulting *is* their business, so pro bono volunteering is very much akin to a "product donation." Programs are being set up that allow partners and associates to "book hours" of pro bono work in the same way they do for paying clients, thus establishing "permission" within the firm that the work is valued, and creating structure to define the size and scope of the program.

  In many ways, this approximates what law firms have done to establish their pro bono "practice." What's more, the skill-set and structure of consulting firms allows them to play the vital role that intermediaries play. Often a more senior consultant will be the team leader and liaison between worker-bee associates and the team at a nonprofit to assure that projects are completed successfully and meet the goals on both sides.

  This trend is moving beyond legal and management consulting firms, too. For example, a nonprofit called Public Architecture was established in 2005 that is signing up architecture

and design firms in the U.S. to dedicate one percent of their working hours to pro bono service on behalf of the nonprofit community.

- Some companies not in the consulting game are organizing pro bono programs around what they consider their "core competencies," or the special skills of particular departments. For example, Target, the giant retailer, has a program in which their property development and store design teams work with local communities to redesign and rebuild school libraries. The Gap, which employs large numbers of young workers, did research showing that getting a good first job is a vital predictor of future success, and the longer in life that is delayed, the more difficult the path. To address this issue, professionals from Gap's human resources and store management teams have partnered with a youth-oriented nonprofit in New York City to develop job preparation curricula, which Gap managers then teach.

- Other companies, while not creating pro bono programs per se around specific skills or functional areas, are open to working in this arena on a more opportunistic basis through existing philanthropic or traditional employee volunteer relationships with nonprofits. For example, after one company's team-building day in which volunteers helped build and stock shelves at a food pantry, a team of logistics experts was motivated to "consult" with the nonprofit on how it could re-engineer its operations to be more efficient in stocking and distributing donated food.

A Third Way - The DIY (Do-It-Yourself) Model
As much as they have expanded of late – and will continue to grow – both the intermediary and corporate models have limitations. Most intermediaries operate in one or at most a few cities, and some have guidelines for the size organization they will serve. For example, the Taproot Foundation, probably the largest in this category, operates in just five U.S. cities and develops projects only with nonprofits that have annual budgets of $350,000 and up, and at least three full-time paid staff.

Corporate programs are often tightly targeted to specific areas of need (school libraries and youth job development are but two examples), linked to specific public relations or corporate citizenship objectives or restricted to already existing partnerships.

These limitations provide some understanding of why nonprofits say they are frustrated over where to find pro bono assistance. It also suggests that for many organizations getting on board the pro bono express will require developing their own internal pro bono management capabilities. So let's call this *the DIY (Do-It-Yourself) Model.*

DIY isn't really new, of course. Most effective agencies already tap the professional expertise of board members, donor organizations or individuals in the community. But too often this is done in an opportunistic, ad hoc way. On the other hand, the DIY pro bono model suggests an intentional and strategic approach – much as is typically done for traditional volunteers – that identifies where professionally skilled volunteers could be helpful, and then builds organizational capability to source the needed talent, bring them onboard, manage the projects to successful completion and provide the recognition for those doing the work. Developing a strategic DIY pro bono capability in an agency will also help it take advantage of intermediary or corporate programs that might otherwise be missed.

A Roadmap for Action

How do organizations move from adhocracy to a strategic DIY pro bono capability? Fortunately, tools and best practices are being developed that offer guidelines for success.

One such comes from the Corporation for National and Community Service, which has created a checklist for engaging pro bono volunteers consisting of four major stages.[8] It could be a roadmap for any nonprofit organization to jump on the pro bono express.

In summary, the four stages are:

1. **Assessment Stage:**
    Because the consultative nature of pro bono volunteering often involves management processes rather than administrative or direct service activities, assessing whether to engage volunteers should involve all levels of the nonprofit's management team, up to and including the board of directors. Roles and responsibilities need to be clarified. For instance, should the same procedures and managers for large numbers of volunteers in direct service roles be used for the comparatively fewer pro bono volunteers? Staff acceptance should be considered also, and discussions held about whether the organization has the right corporate or community contacts to attract needed pro bono talent, and if not, how to develop them. Pro bono engagements take staff time, too, so the ability to manage the project – to do internally what an intermediary might do – needs to be figured out. Thorough assessment up front will assure that the time is well spent and that benefits outweigh expenses and risks.

2. **Planning Stage:**
    Deciding what can be done by pro bono volunteers versus staff or a paid consultant is a big piece of the next stage. Strategic plans and other management planning activities can be used to identify potential projects. Processes to define the scope of work, schedule and specific skills needed should be developed, as well as how the organization will find and recruit highly-skilled volunteers, and then interview and screen them for assignments.

3. **Engagement Stage:**
    Just like any staff member or direct service volunteer, for pro bono volunteers to perform effectively, they need to be oriented to the mission and understand how the organization operates. Protocols are also needed to keep projects on track, including clarity on who inside the organization will supervise the project and where accountability for performance will rest. Ways are also needed to maintain open communication among the volunteer team, internal staff directly involved in the project, and others who may be affected by the activity.

4. **Evaluation Stage:**
    The results of projects need to be evaluated against goals established at the beginning, including quality of the engagement, performance against schedule and budget estimates, etc. Implementation of recommendations or the actual physical products need to be evaluated. And team members – both volunteer and staff – need to be recognized for their efforts.

Your Ticket to Ride

Can pro bono volunteering help create a transformational revolution in nonprofit management?

Perhaps that's too much to hope for. There is no doubt, however, that organizations embracing the promise and developing their capabilities to use pro bono talent have the potential to greatly improve their capacity to serve. Whether tapping into intermediaries, linking to a corporate program, or going DIY, finding a way to engage pro bono volunteers should be on every organization's agenda.

The pro bono train is leaving the station. ALL ABOARD!!!!

Footnotes

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¹ Quote is contained in an online training course from the National Corporation for Community Service titled: *Nonprofit Readiness Toolkit for Pro Bono Volunteering* at: http://www.nationalserviceresources.org/links/nonprofit-readiness-toolkit (Learners must create an account on the site (at no charge) to gain access to this and other resources.)

² According to Wikipedia [http://en.wikipedia.org/wiki/Pro_bono_publico], "pro bono publico" is also used in the United Kingdom to describe the central motivation of large organizations such as the BBC, the National Health Service, and various other NGOs (Non-governmental organizations), which exist "for the public good" rather than for shareholder profit.

³ See article "New Directions in Employer-Supported Volunteering - Part 2" *e-Volunteerism*, Vol. IX, Issue 4, Jul. 2009*. (Access the full text of* e-Volunteerism *articles through the* e-Volunteerism *links from your* Everyone Ready *Main Page.)*

⁴ Liber8 *Economic Information Newsletter* (now *Page One Economics Newsletter*), March 2008: http://research.stlouisfed.org/pageone-economics/uploads/newsletter/2008/200803.pdf

⁵ For more about the various generations, see the Wikipedia entry for Cultural Generations: http://en.wikipedia.org/wiki/List_of_generations

⁶ For more about "A Billion + Change" Initiative (Corporation for National & Community Service), see http://www.nationalservice.gov/about/initiatives/probono.asp

⁷ Aaron Hurst, Pro Bono Junkie's Blog, April 3, 2009: http://www.taprootfoundation.org/blog/aaron-hurst/2009/04/

⁸ See training course from the National Corporation for Community Service titled: *Nonprofit Readiness Toolkit for Pro Bono Volunteering.* The course is listed in the "Volunteer Leveraging" Category at: http://learning.nationalserviceresources.org/course/index.php. Access requires online registration but is free.

ADDITIONAL PERSPECTIVES

As the Featured Reading suggests, most organizations seeking to engage pro bono volunteers will likely be in DIY (Do-It-Yourself) mode. Even those who work with an intermediary firm or affiliate with a corporate program should understand what's expected of them in order to be a good partner. Pro bono engagements are collaborations between volunteers with professional skills and agencies with specific needs. While all the principles of good volunteer management apply, there are some important elements that increase the likelihood that involvement of highly-skilled volunteers working in a pro bono capacity will be successful.

Preparing Your Agency

One of the common challenges to volunteer program leaders is getting agency staff to be open and creative in developing roles for any volunteer. Sometimes this is because they falsely assume volunteers are non-skilled or differently-skilled from the needs of the organization. Since pro bono volunteering is – by definition – the engagement of professionals donating their expertise, it is vital that such *consulting* is truly welcomed.

Some tips:

- Talk with your executive team, department heads, etc., about their needs. Often, pro bono volunteers are people who can help *them* achieve their goals.

- Find out if the agency has – or plans to – hire paid consultants. Discuss whether there is opportunity for a portion of the work – if not the entire project – to be done pro bono.

- Discuss what has been on the agency's wish list for a long time, but no one has time or expertise to do it. These are the "if only" projects that have languished for lack of funds or other resources, but when completed could boost the organization's capacity to serve its clientele.

- Consider short-term projects rather than ongoing work. Short-term assignments that can be done whenever the volunteer wishes as long as deadlines are met will more likely fit the schedule requirements of pro bono volunteers with full-time jobs.

Identify what resources will be needed to recruit, screen/interview, supervise, evaluate, and recognize these volunteers in addition to what is already done for current volunteers. It may be that your current management protocols will suffice; in some cases they will not. For example, a volunteer program that requires background checks and fingerprinting because of the clients involved may need to find a way to waive those requirements for pro bono volunteers whose interaction will be only with staff.

Possible Resistance

With any volunteer effort, frequently there is some (or a lot of) tension between paid staff and volunteers. With pro bono volunteers, despite the gratitude of the agency for the expertise donated, the potential exists for trouble. Some of the most often expressed concerns include:

- The suspicion that a pro bono volunteer is really pursuing a staff job. This issue has probably been heightened by the recession atmosphere in which many out-of-work professionals and new graduates are being counseled to "do volunteer work" to keep their skills sharp, avoid time gaps in their resume, or to network for possible employment opportunities.

- The concern that volunteers from the business world may not respect or value the skills of paid staff or long-service volunteers, or even the mission of the agency since it doesn't "make a profit."

- The feeling among staff that they will be overwhelmed by the time it will take to "manage" a pro bono volunteer who may have professional expertise but hasn't a clue about what the agency does, how it operates, or what it is like to work in a nonprofit setting.

- The fear of being left in the lurch if a pro bono volunteer who has been entrusted with a critical management assignment fails to follow through on the commitment.

- The "you get what you pay for" syndrome that suggests that pro bono talent will not be as expert or diligent as a person working for pay.

In many cases, these are realistic concerns. After all, even paranoids have real enemies some times. However, these issues can be mitigated or even prevented by thinking in a strategic way about how pro bono volunteers can help the organization, and then establishing procedures and practices that will prepare you for success. Among the steps that can be taken are:

- Establish processes to select the appropriate expert(s) to do the work. Use the same rigor as in hiring staff for a critical function. Not every person saying they have applicable skills is right for your organization. Applicants for pro bono volunteering will need a more deliberate screening process than that used for some other volunteer categories for which enthusiasm may be the primary qualification; remember, too, that the number of pro bono volunteers will only be a percentage of the rest of the volunteer corps.

- Prepare guidelines for the type of work that should be assigned on a pro bono basis, and clearly delineate project scope in consultation with the functional department needing the work.

- Whenever possible, get written commitment from the volunteer (or team) for the time that will be needed and the scope of work s/he will perform. This is a well-understood business practice – think of it like a consulting engagement agreement – and could avoid having you "left in the lurch." If the pro bono resources are coming through an intermediary organization or company program (rather than from an individual), there is often (or should be) a "project champion" at the firm who becomes the "guarantor" that the work will be completed, and is in a position to assure that a replacement will be provided if the pro bono volunteer or team member cannot see a project to completion.

- Provide pro bono volunteers with a strong orientation to the agency. Even if they will work on a specific project not involving client service, they should still have a firm understanding of the agency's mission. Be sure they meet the right people in the agency who will provide information about the need they will be addressing, and invite their ideas on possible solutions.

- Clarify the role of agency personnel in working with pro bono volunteers. Pro bono projects need "owners" within the agency who will help set the dimension of the work, and should be in authority to accept the result. This may not be the volunteer program director. Rather, it could be a department head for whom the work is being done, the executive director or, if a critical governance issue, it may even be a member of the board of directors. Other staff may be needed to work directly with the pro bono volunteer on the nuts-and-bolts of the assignment. If extra time to work with the volunteer will be required, get the understanding and commitment at the outset, and give recognition to its value, even if just by saying an extra "thanks."

- How the pro bono volunteer does the work is important, too. If s/he needs to be on site, a suitable workspace needs to be provided. Very often, however, the pro bono volunteer will work independently after being given the assignment, only coming to "the office" to get information/materials, provide status checks and present finished work. Making sure the way work will be done is clear at the outset is a good way to avoid misunderstandings.

- Put a monetary value on the pro bono work. Project value can be estimated by thinking what an outside consultant would charge, or by simply asking the volunteer what s/he would charge a paying client for the same work. Corporations providing pro bono help – especially those from the consulting industry – will sometimes use Fair Market Value (FMV) estimates of the service, based on the hourly billing rate for the professionals involved. (The Council for Encouraging Corporate Philanthropy has created FMV guidelines used by companies responding to their annual philanthropy survey. A summary of the criteria can be found on the [Taproot Foundation Website](#).) The point is that understanding the monetary value of pro bono work – and its addition to the agency budget – helps establish its credibility for the entire organization.

- Finally, set a firm expectation at the outset of an assignment, both within the agency and with the pro bono volunteers, that the quality of work will be no different from that if the agency paid for it.

Determining Pro Bono Assignments

In thinking how your organization might approach pro bono volunteers, it is useful to consider these two general categories of assignments:

1. Those aimed at operational specifics or a tangible product (e.g., producing a marketing brochure).

2. Those directed to improving overall management capacity (e.g., creating a human resources plan).

Let's explore each.

Operational Assignments

Most organizations have operational assignments well suited for pro bono volunteers, ranging from finding an attorney to negotiate a contract to recruiting a Web designer to update the agency's online presence.

The key attributes of successful operational pro bono assignments usually follow the [SMART mnemonic](#) familiar to the project management discipline: project goals need to be specific, measurable, attainable, relevant and time-bound.

Here's an example. I have a friend who's had a long career as a journalist/publicist. My wife and I got her interested in the mission of a community blood center. We introduced her to the marketing/public relations person in the agency, and they quickly learned that our friend lived at the fringe of the blood center's service area where the organization was not well known. The upshot was a "pro bono assignment" to do a series of press releases and story pitches to local weeklies, which had a measurable positive impact on blood donations from the targeted area.

Many reading this will ask: "Isn't that just good volunteer management practices?" And, of course they'd be right.

The question I'd ask back is whether an agency engages volunteers in this way in an ad hoc manner (which is often the norm), or whether there is an intentional strategy within the organization to identify operational projects with the potential to be assigned to pro bono volunteers, and a clear plan to implement that strategy. It should also be pointed out that this engagement was a direct connection between the volunteer and the public relations director without coming through the volunteer program office. Without clear policies known throughout the agency in which the volunteer program manager is fully engaged, pro bono volunteering could well bypass important processes that could make it even more effective. There is also the danger that such engagements may not be included when volunteer contributions are tallied, reported, and recognized (and potentially not covered by insurance).

The "Preparing Your Agency" section above gives some tips on strategic elements. The key is identifying *what* needs to be done on a function-by-function basis, then assessing current resources available to achieve those goals, identifying which are candidates for pro bono engagement, recruiting the talent (more on this below) and managing the engagement.

Capacity-Building Assignments

If operational assignments are down-in-the-trenches, tactical quick hits, capacity-building assignments relate more to the overarching goals of an organization and typically involve the transfer of strategic management or technical knowledge from business to the nonprofit sector. That's not to say that businesses have all the answers, or that nonprofits are poorly managed. There is, however, recognition from both sides that there is much to be gained through greater collaboration on management issues.

The 2009 Deloitte Volunteer IMPACT Survey lists the following general areas where nonprofits see the most need of strategic pro bono support:

- Marketing/Branding
- Fundraising
- Legal
- Strategic Planning
- Technology Infrastructure
- Board Development
- Human Resources and Leadership Development

To be sure, there are likely to be short-term operational assignments in each of these areas, too, but a capacity assignment is more likely to look at the function as a whole, with the outcome aimed at positively affecting overall performance, or repairing a critical deficiency in the organization.

Capacity building assignments may start with one of these general questions:

- Does our organization have the *management capacity* to monitor, assess, respond to, and create internal and external changes that will sustain our vision and achieve our organizational mission?
- Does our organization have the *technical capacity* (e.g., time, skills, knowledge, experience, materials, space, equipment, technology, etc.) needed to implement all the key programmatic, operational, and mission functions?

Pretty big questions. But, they are critical to any organization's ability to perform well, to grow, and to adapt to a changing world.

Asking these questions is likely to lead to specific responses. On the management capacity question, a prescription may be something such as, "We need to update our strategic plan." Or, "We need clearer human resources policies." On technical capacity issues, it may be, "We need a new volunteer data-base management system." Or, "We've outgrown our building, and need to investigate how best to expand."

With specific questions in hand, project outlines can be drawn and resources developed to complete the tasks, including the possibility of pro bono assistance.

An example: A nonprofit I know needed a total revamp of its telephone infrastructure for a multi-site network of group homes. Rather than paying a consultant or burdening a staff person with the added responsibilities to oversee the project, a board member with expertise in the telecommunications industry was recruited as the pro bono project leader. He wrote the request-for-proposals (after talking to staff and volunteers to be sure he understood the organization's needs), identified potential vendors, interviewed sales representatives, analyzed bids, made recommendations to the executive director and, because the new system's cost was a significant budget item, presented the plan to the full board. The new system was purchased and installed (using, by the way, some pro bono volunteers to help with the implementation and staff training), and the added capacity greatly improved the agency's overall effectiveness.

Recruiting Pro Bono Volunteers

So far, we've looked at how an agency can organize to manage effectively a pro bono volunteer initiative, and we've explored different types of pro bono assignments. But where are the people? How does an agency find and recruit pro bono volunteers?

Use the Traditional Approach

One answer is the same way you find volunteers for traditional assignments. Outreach programs using advertising, Web resources, volunteer job fairs, word of mouth, and all the other arrows in the quiver of volunteer recruitment are very valid for highly-skilled, pro bono volunteers, particularly for short-term operational assignments.

Online registries of volunteer opportunities have always allowed organizations to include their needs for professional skills and expertise when describing available volunteer assignments. The key for volunteer program managers to improve their "match rate" using such systems is to be as explicit as possible in describing the pro bono skills they are looking for, and the work that needs doing. Phrases such as:

- Need an information technology professional to… ;
- Seeking a human resources expert to…; or
- Offering a Web designer the opportunity to…

will allow those interested in pro bono assignments to "find themselves" and your agency.

There are also a number of new Web sites focusing specifically on highly-skilled volunteers, such as Smart Volunteer (www.smartvolunteer.org) and Catchafire (www.catchafire.org) in the U.S. as well as Good Company (http://www.goodcompany.com.au/) and Pro Bono Australia (http://www.probonoaustralia.com.au/).

Every profession has its own professional society, usually with state/provincial chapters or affiliates. The traditional professions, especially law, medicine, and accounting, all have established committees and often staff assigned to coordinate the pro bono work of their members, and a wide range of other professions are now following suit. So contact the society's office and explain your recruitment search.

Search Within

Don't forget your current volunteers as well when looking for pro bono help. Don't assume volunteers serving in other roles don't have management capability. You and the volunteer may both be pleasantly surprised at the chance to change their role from what you have always asked them to do in client service or on administrative tasks if you can match their professional skills with the capacity needs of the organization. Some highly-skilled volunteers truly are content to do things that are a complete change from their work and don't want to donate their professional skills. But how often are volunteers pigeonholed for what they have "always done," and how can the volunteer program manager find the "hidden jewels" of pro bono talent within the corps of traditional volunteers?

Make sure all volunteers and employees know what type of expert volunteer help you are seeking. Not only might this surface talents among them, but they may also have relatives or friends with such skills and might recruit for you.

Engage Your Board

Another insider source for pro bono talent is your organization's board of directors. Hopefully, boards are populated with individuals committed to the organization's mission who come to the table with expertise and a wide network of contacts, including their own businesses.

When a nonprofit is in the start-up stage, board members are often called upon to be "hands-on" extensions of staff, performing a wide range of functions central to building the capacity to deliver on the mission. A lawyer on the board may negotiate leases or contracts for service. A human resources executive may write personnel policies. An accountant may be the chief liaison with the external auditing firm. This is well within the definition of pro bono volunteering.

As organizations mature, and board roles shift to primarily policy setting and fundraising, it is still appropriate to tap members' expertise on a particular business issue or ask if they can reach into their network of colleagues and contacts to attract pro bono professionals who can address operational or capacity needs.

Connect with Corporations

As noted in the Featured Reading, corporations are a huge potential source of pro bono volunteers. But surveys show nonprofits are often frustrated from not knowing which companies offer such employee volunteer programs and who within a company they should contact for pro bono resources.

Hopefully, as pro bono volunteering becomes a more normal part of company programs, this will shake out. In the meantime, volunteer program managers – after first arming themselves with clearly defined assignments suitable for pro bono volunteers – can try the following:

- Start with company contacts made through single-day or episodic volunteering projects. Use those events to introduce employee volunteers to your mission and the operating or capacity needs of your organization. Present some concrete examples to whet peoples' interest in coming back individually or in teams in a consultative, pro bono role. If you know the volunteers are from a specific company department, tailor your pitch to their skill area.

    An example of this comes from an agency that ran a thrift shop selling donated used clothing. A company's marketing department team was scheduled to come for a half-day event where they performed hands-on tasks such as sorting clothes, moving racks, cleaning and painting the sales floor. At the end of the day, the agency head and volunteer manager not only thanked the volunteers, they began a discussion about how the thrift shop operates and the goals to upgrade the shop's performance. This motivated a small team from the company to work with the agency to develop and implement a plan to sort out the

"best clothes," establish an "upscale brand" section of the thrift store, and market it in a youth-oriented campaign they developed for young people interested in "vintage" clothing. The team even recruited some hands-on volunteers from their company to help set up new displays. It was a great win all around: The volunteers felt good about using their professional skills to help a social cause, and the agency improved the financial results of its core activity, which provided resources for other operational needs.

- Another point of contact with potential corporate pro bono volunteers is through the development activity of your agency. With pressure on corporate giving budgets, many companies are looking for ways to maintain their support to nonprofit partners in ways other than cash grants. Armed with information about, let's say, the top five areas where pro bono volunteers can help your organization, the volunteer program manager and development team can jointly make a pitch to corporate donors, exploring ways to add value to the partnership through pro bono assistance in addition to monetary support.

  An example comes from my former employer, General Electric (GE), whose foundation once provided a grant to the Bridgeport (Connecticut) Area Foundation (now part of the Fairfield County Community Foundation), a sort of "chamber of commerce" umbrella organization for nonprofits. The grant was to help develop training and other services aimed at building nonprofit capabilities in a number of sectors. Rather than just handing over the check and be done, discussion between donor and grantee personnel exposed a lack of knowledge about what specific management functions were most in need of attention in the community. As a result, GE donated the time of the person who managed the company's global employee survey function (we called him Dr. Survey because he had a PhD in organizational design) to write and implement a community-wide needs assessment survey. The result, reported publicly with great media interest, informed development of a targeted training curriculum aimed at nonprofit leaders, some of which GE personnel wrote and taught.

How Does Pro Bono Volunteering Fit into the Existing Volunteer Program?

The buzz around professional skills volunteering and the drive from within corporations are having an observable, if currently anecdotal, effect. People walking through agencies' "front doors" – literally or through technology contacts – are an important source of individuals for pro bono assignments.

This leads to the question: Will the way an organization's volunteer program operates need to change to take advantage of this surge in pro bono interest?

Over the past decade and more, the range of services donated to organizations and the profile of the people who give their time and skills have widened greatly – and the word "volunteer" is not necessarily the label applied. Volunteer program managers have become community resource mobilizers and pro bono volunteers bring their own special dimensions.

For example, pro bono volunteers may not start at the volunteer program office. A marketing expert may directly contact the agency's public relations director or someone with grant-writing experience may go to the development office. Needs may arise at the senior management or even board level – particularly around management capacity issues – and pro bono solutions could develop outside the flow of more traditional volunteers.

Even though pro bono volunteering is mostly applied to agency management issues while most other volunteers do direct service work, it's important not to create an entirely separate system for engaging the professional in donated service. The best volunteer program managers are *facilitators* of the volunteer engagement process regardless of what types of volunteers they recruit or the work

volunteers will do. What may be different here, however, is that the staff members who will ultimately team with the pro bono volunteer may be at a much higher level in the organization than those who supervise front-line volunteers now. Volunteer program managers therefore need to be involved more broadly in management issues to understand where and how pro bono volunteers can be utilized and what problems they can be called upon to help solve.

If pro bono volunteers make first contact with someone else, that's fine, so long as everyone understands that, before beginning work, the pro bono volunteer will complete all paperwork and screening required of *all* volunteers (adapted when necessary, as explained earlier), get an orientation, be recognized, and be put into the communication loop operating for all time donors. The added dimensions pro bono volunteers bring can be challenging, but embracing them can lead to the volunteer program manager being more valuable to the organization, and more deeply involved in the warp and woof of the management of their agency.

An impressive new resource for agencies interested in developing their pro bono volunteer processes is the Pro Bono Readiness Roadmap site. Created in collaboration by several of the "players" referenced elsewhere in this Guide (Capital One, Taproot Foundation, Points of Light, Common Impact), this comprehensive Web site provides checklists, guidelines and resource links covering the full process of measuring readiness within the agency, identifying potential pro bono projects, sourcing appropriate volunteers and managing the engagement. As of spring 2012, it is still a work in progress. But it offers close to a one-stop source for agencies that wish to "Get on Board the Pro Bono Express."

I'm on the optimistic side that thinks the momentum in this area will only get stronger as more individuals, companies and organizations work together to define ways to move pro bono volunteering from a relative rarity to just another way of doing business.

ASK THE TRAINER SPECIFIC QUESTIONS

Discussion Board

Ask the Trainer Questions Specific to Your Situation

When?
During the time this Guide is featured on your *Everyone Ready* Main Page, trainer David Warshaw will be ready to answer any questions that you post on the Discussion Board, accessed via the left column of the *Everyone Ready* Main Page.

Trainer David Warshaw

Many *Everyone Ready* participants ask "But, how does all this relate to *my* situation?"
The Discussion Board is your chance to ask specific questions related to your organization and to connect with others that may be having similar experiences.

How Does the Discussion Board Work?

- Look for the trainer's photo in the Featured Topic area of the *Everyone Ready* Main page and select "Join the Discussion" underneath.

- Indicate whether or not you would like to receive notifications about new questions and answers posted to the Discussion Board.

- The Discussion Board window will appear.

- Select a "thread" (a particular topic) to read and respond to, or start a new thread (if you have a completely different issue to discuss).

- Follow the directions on the screen to post a response or question.

The trainer will respond via the Discussion Board within 48 hours. If you've signed up to receive notifications, you'll get a direct e-mail with the answer, and your exchange will also be posted to the Discussion Board for the benefit of all participants (you will be given the option to keep the posting anonymous).

STUDY QUESTIONS FOR INDIVIDUAL OR TEAM USE

1. Has our organization engaged pro bono volunteers already? What were conditions that led to success? What were conditions that prevented the effort from achieving its goals?

2. When is it appropriate for our organization to consider pro bono volunteers to accomplish our goals?

3. How should an effort to incorporate pro bono volunteers be organized? Who should be involved (be as specific as possible)? Where in our management structure should this effort be placed?

TRY-THIS EXERCISES

While individuals can certainly benefit, these activities will likely create more momentum for change if they are completed and discussed by teams of people within your organization.

1. **Rear-View Mirror Exercise**
   Sometimes a good way to see the future is to explore what's happened in the past. Has your organization hired paid consultants or professional services vendors in the last three years to implement specific projects? If so, obtain as much information about the project(s) as possible – scope, cost, outcomes, etc. If there was a contract for service, review its terms. Then analyze how you might have approached a pro bono volunteer (or team) to do the same task.

2. **Pros and Cons Exercise**
   Many people use a simple pro/con exercise to help them make decisions about lots of things, so why not for pro bono volunteering? Review your organization's strategic plan, annual work plan or other documents. Identify two specific projects or goals that you think could be handled by pro bono volunteers. For each, do a pro and con listing: On one side of a page, list the benefits of using pro bono volunteers (versus other resources, such as staff, a hired vendor or consultant, other volunteers); on the other side of the page, list the disadvantages. Discuss with your team how the benefits could be strengthened and the disadvantages mitigated.

3. **Same/Different Exercise**
   For each volunteer management practice below, list two or three similarities and differences in how you might manage the engagement of pro bono volunteers versus traditional volunteers.

Volunteer Management Practice	Ways you would manage pro bono volunteers similarly to traditional volunteers	Ways you would manage pro bono volunteers differently from traditional volunteers
Sourcing potential volunteers (how/where would you find them)		
Selecting volunteers		
Orienting volunteers to your organization		
Defining the volunteer assignment		
Monitoring and assessing the volunteer's work		
Providing recognition to the volunteer		

RESOURCES ON THIS SUBJECT

Other Relevant *Everyone Ready* Resources

Depending on the *Everyone Ready* membership level of your organization, you may have access to some or all of the following topics. To access, just go to the All Topics section of your Main Page (located on the right in the orange sidebar) and use the search/sort functions to get to a topic.

- *Cutting-edge Trends and Issues in Volunteerism,* Online Seminar by *Susan J. Ellis*

- *Tapping Into Corporate Volunteer Programs,* Self-Instruction Guide by *David Warshaw*

- *The Power of Integrating Volunteers throughout Your Organization,* Online Seminar by Martin J. Cowling

- *Turning Single Days of Service into Longer Volunteer Involvement,* Self-Instruction Guide by Steve McCurley

Web Resources

Resources defining and describing pro bono volunteering and other skills-based volunteer initiatives are proliferating. Many sites include case studies, which organizations can use to analyze possible ways they can get involved. Although some are aimed at a business audience, nonprofit organizations can learn much from the discussion about how the for profit world is organizing to provide more pro bono services.

A Billion + Change Initiative (**Corporation for National & Community Service)**
http://www.nationalservice.gov/about/initiatives/probono.asp
A challenge to leverage more than $1 billion in skilled volunteering and pro bono services from the corporate community.

Deloitte Volunteer IMPACT Research
http://www.deloitte.com/view/en_US/us/About/Community-Involvement/f0d3264f0b0fb110VgnVCM100000ba42f00aRCRD.htm
For several years, the accounting and consulting firm, Deloitte, has been measuring important aspects of corporate community involvement. At the link above you will find annual reports from 2004 to 2011. Of special interest is the *Deloitte 2009 Volunteer IMPACT Survey – Pro Bono Volunteering* report, (http://www.deloitte.com/view/en_US/us/About/Community-Involvement/volunteerism/impact-day/7651773b93912210VgnVCM100000ba42f00aRCRD.htm), surveying volunteer management capacity in America, data from nonprofit and business respondents, and providing insight into current trends and future possibilities for pro bono volunteering.

Nonprofit Readiness Toolkit for Pro Bono Volunteering
http://www.nationalserviceresources.org/links/nonprofit-readiness-toolkit
This online course from the Corporation for National and Community Service includes a case study, descriptions of pro bono engagement, and a self-assessment for nonprofits interested in starting or expanding their pro bono effort. Learners must create an account on the site (at no charge) to gain access to this and other resources.

Pro Bono Readiness Road Map
http://readinessroadmap.org/
A comprehensive site for agencies to assess their readiness to engage with pro bono volunteers and to guide their efforts.

Web Resources *(continued)*

Relevant Sections of the Energize Online Library

Corporate Responsibility and Employee Volunteering
http://www.energizeinc.com/art/subj/corpres.html

Professions in Service
http://www.energizeinc.com/art/subj/profsas.html

Articles and Reports

To read e-Volunteerism *articles, access the journal from your* Everyone Ready *Main Page.*

The Committee to Encourage Corporate Philanthropy. *Giving in Numbers: Corporate Giving Standard, 2011 edition.* An in-depth analysis of 2010 corporate philanthropy data from 184 leading companies, including 63 of the top 100 companies in the FORTUNE 500.
http://www.corporatephilanthropy.org/pdfs/giving_in_numbers/GivinginNumbers2011.pdf

The Committee to Encourage Corporate Philanthropy. "Pro Bono Service: Leveraging Employee Expertise." *The Corporate Philanthropist,* Vol. VIII, Issue II, Spring 2008.
http://www.corporatephilanthropy.org/resources-lp/best-practices/the-corporate-philanthropist/recent-issues/the-corporate-philanthropist-pro-bono-service.html

Ellis, Susan J. "The Role of Business in Social Causes in the 1970s." *e-Volunteerism,* Vol. XI, Issue 4, Jul. 2011.

Jackson, Rob. "New Directions in Employer-Supported Volunteering – Part 1." *e-Volunteerism,* Vol. IX, Issue 3, Apr. 2009.

Jackson, Rob. "New Directions in Employer-Supported Volunteering – Part 2." *e-Volunteerism,* Vol. IX, Issue 4, Jul. 2009.

Kelly, Colleen. "Engaging Highly-Skilled Volunteers — The Competitive Edge." *e-Volunteerism*, Vol. VIII, Issue 1, Oct. 2007.

McCurley, Steve. "Volunteering Through the Workplace." *e-Volunteerism,* Vol. IX, Issue 4, Jul. 2009.

Warshaw, David. "Get on Board the Pro Bono Express." *e-Volunteerism,* Vol. X, Issue 2, Jan. 2010.

Warshaw, David. "Today's Corporate Workplace Volunteering in Context." *e-Volunteerism,* Vol. VI, Issue 2, Jan. 2006.

Books

Can be purchased using your Everyone Ready *discount code in the Energize, Inc. online bookstore at* www.energizeinc.com/bookstore. *Your discount code, which you will need to enter upon checkout, can be found on your* Everyone Ready *Main Page.*

Ramrayka, Liza. *Employee Volunteering.* The National Centre for Volunteering, 2001.

Reynolds, Kate. *Take Your Partner for the Corporate Tango: A Guide to Developing Successful Business and Community Partnerships*. Volunteering SA Inc., 2001.

Volunteer Vancouver. *A People Lens: 101 Ways to Move Your Organization Forward.* Volunteer Vancouver, 2009.

POST READING SELF-ASSESSMENT

In the Pre-Reading Assessment, you were asked to rate your organization on several attribute pairs regarding pro bono volunteering. Based on the information provided in this Guide, list steps you can take to improve your organization's performance in each area. This can give your organization a "road map" to improve your success in working with pro bono volunteers. If working in a group, discuss first any differences you had in your original individual scores for each area, perhaps coming to consensus or taking a numerical average of the individual scores. This will clarify existing perceptions within the organization on the current state.

Paired Attributes		Score (1-5) from Pre-Assessment	We can improve our performance by…
Our organization has had no successful engagements of pro bono volunteers.	Our organization has had many successful engagements of pro bono volunteers.		
Our organization has done nothing to create a comprehensive plan to incorporate pro bono volunteers into our operations.	Our organization has a well-defined strategy to incorporate pro bono volunteers into our operations.		
Pro bono volunteers are likely to be viewed as a threat to our staff and current volunteers.	Pro bono volunteers are likely to be welcomed by our staff and current volunteers.		
There are no jobs or projects in our organization appropriate for a pro bono volunteer.	There are many jobs or projects in our organization appropriate for a pro bono volunteer.		
A volunteer coming to our organization offering to provide pro bono service would become frustrated with the experience.	A volunteer coming to our organization offering to provide pro bono service would have a terrific experience.		
There has been no integrated discussion about pro bono volunteers involving current volunteers, staff, senior management and the board of directors.	Discussions about pro bono volunteers in our organization have integrated views from current volunteers, staff, senior management and the board of directors.		

ABOUT THE TRAINER

David Warshaw

David Warshaw is founder and principal of Vistas Volunteer Management Solutions, a consultancy formed to help businesses and nonprofits build capacity to improve their communities through strategic volunteering. Prior to starting his firm, David was a public relations executive for the General Electric Company (GE) for 27 years, and for five years directed GE's award-winning global workplace volunteer effort that enlisted more than 60,000 employee and retiree volunteers in more than 35 countries.

He is Board President for the Volunteer Center of Bergen County (New Jersey), and is an appointee to both the New Jersey Governor's Advisory Council on Volunteerism and Community Service and the New Jersey State Volunteer Commission. He teaches graduate marketing and communications at Montclair State University and Farleigh Dickenson. He is a former member of the Points of Light Foundation Board of Directors, and chaired the Foundation's National Council on Workplace Volunteering. Before working at GE, David had a ten-year career in education. He can be reached at dwarshaw@VistasVMS.com.

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We would love to hear your thoughts about the quality of this Self-Instruction Guide. Your feedback will help us to improve our training materials for you in the future. Please take a moment to complete the online evaluation; this link can also be found on your Main Page during the time this Guide is the featured topic (and, for organizational members, on the page where you download the Guide once it is archived).

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Everyone Ready® is a staff development training plan produced by Energize, Inc. to sharpen volunteer management skills. The plan includes online training materials provided throughout the year on basic and advanced volunteer management subjects. There are individual and organizational memberships, the latter designed to allow organizations to share the content with volunteer and paid staff at every level and geographic location across their networks.

Featured Reading
Adapted and updated (2012) for this Guide from the article, "Get on Board the Pro Bono Express," by David Warshaw, published in *e-Volunteerism: The Electronic Journal of the Volunteer Community*, Volume X, No. 2, January 2010.

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