Stage One: Scope Projects

You probably have a long to-do list of projects in your head that you know would help you advance your organization's mission. In *Stage One,* we'll help you prioritize that list and figure out which projects would make the best pro bono engagements.

We'll walk you through the key steps to developing the right pro bono project scope (as shown in Figure 1.1). First, we'll look at your organizational priorities. Then we'll explore how pro bono might address each of these needs. Using some simple vetting tools, you'll arrive at a list of projects that are good matches for pro bono service. With your vetted list in hand, you can then prepare to share the opportunity externally by creating the first draft of a scope document and selecting an internal team.

Scoping projects is an iterative process—the right scope for an engagement is the first working step in a partnership between the nonprofit and the pro bono provider. It's unlikely that the scope document you create in this exercise will be the final version you use in a project. But you need a first draft so that you can talk meaningfully about the project with potential providers. At the end of *Stage One,* you'll have in hand a couple of carefully selected projects and a first-take scope document for each, and you'll be ready to search for and approach potential pro bono partners.

FIGURE 1.1
The Scoping Process

Understanding Your Pro Bono Project Needs

> "I always have an intuitive sense of what my organization needs—but by unpacking my reasons, I'm better able to set priorities and determine what can be done pro bono, and what I need to pay for."
>
> —*Ellen Schneider, executive director, Active Voice*[1]

One-third of all nonprofits applying to the Taproot Foundation misdiagnose their need—they highlight a symptom rather than a cause, or name something they're familiar with rather than the thing that's really bugging them. For example, many nonprofits looking for print materials haven't yet thought about the audiences or messaging that are the foundation for any marketing. Without that messaging, any print piece will be weaker than it should be; with that messaging, nonprofits can use a number of delivery methods, from print to online to in-person conversations, and know they're getting the right message out. Clearly articulating your needs is one of the most important steps in pro bono.

The easiest way to identify your pro bono project needs is to use your to-do list to identify potential projects. With this approach, you list things you think your organization needs and then confirm that the projects fit your high-level strategy.

The confirmation step is key; you don't want to use pro bono for something that isn't in line with your longer-term goals. (You probably don't want to use any resource for that type of prtoject, of course, but sometimes the idea that pro bono is "free" leads people to make hasty decisions about how to use it.)

For example, you know that you need a new website. Everybody needs a website! But you can use your strategic plan to confirm and clarify this

FIGURE 1.2

Two Ways to Identify Pro Bono Project Needs

Use your to-do list	Use your strategic priorities
• What tasks or projects do you anticipate in the next 6 to 12 months? • How can pro bono help you meet those needs? • This is called **To-Do List-Based Needs Assessment**	• What are the goals established in your strategic or multiyear plan? • How can pro bono help you accomplish those objectives? • This is called **Strategy-Based Needs Assessment**

website priority: if one of your goals is to provide more information to the public to educate them about your issue, a website is a critical tool. Starting with your to-do list helps you move quickly from needs to potential projects. This chapter describes how to do a to-do list–based assessment.

A more complex approach to identifying pro bono needs is to work in pro bono as you translate your strategic goals into operations planning. With strategy-based needs assessment, you use your organization's strategic plan or long-term goals to generate projects by asking, "How will we accomplish this goal?" For example, to build awareness of your organization and issue, you might want to build better communications training for your frontline staff.

The strategy-based approach is essential when you're using a lot of pro bono and integrating pro bono work into your overall resource strategy—as you scale your pro bono use and become Powered by Pro Bono. We'll cover the strategy-based approach in more detail in *Stage Four.*

Using a To-Do List to Identify Project Needs

Using a to-do list to identify projects is assessment based on intuition. You don't need to generate a new list of projects; you just need to identify what might work with pro bono and then confirm that those projects are important to your goals.

The key to assessment based on your to-do list is always to connect the task under considerationv (for example, designing that new website) back to strategic or multiyear goals. These goals don't need to be the origin of the project, but you should be able to use a series of "why" questions to connect the task to a strategic priority.

Using Worksheet 1.1 at the end of this stage, begin by writing a project list, and then describe the specific tactic, project, or action that each pro bono project will help you accomplish. Then, working down the list, continue to ask yourself, "Why will this help us accomplish our departmental, organizational, and strategic multiyear goals?"

(If you don't have a strategic plan or other way of articulating your goals, see "Appendix A: Determining Your Multiyear Goals" for an example of a multiyear goal-setting exercise that you can use to vet your project list.)

It is important to remember that there may be multiple tasks or actions that help you accomplish each departmental goal, organizational goal, and strategic priority. Always answer as many of the "why" questions as you can. The key is to trace the action or activity back to the reason that it is important to the organization.

> Prefer to identify projects using your multiyear goals?
>
> See the Level Two section in *Stage Four* to learn more about strategy-based needs assessment.

Interested in seeing how this exercise might look in real life? Figure 1.3 shows some sample projects that can each be traced back to a different multiyear priority. For a list of potential projects, refer to "Appendix H: Potential Pro Bono Projects."

Common Needs That Pro Bono Service Can Meet

> "We often have clarity about what we're looking to achieve; it's the path that can be unclear."
>
> —*Alan Morales, executive director, CEP Youth Leadership Inc.*[2]

Are you having trouble identifying specific tasks or activities that need to be accomplished? Or, are you struggling to connect those tasks to a defined pro bono project? Often, thinking about the challenges you face within your organization or within specific departments can help generate a list of viable project opportunities. Table 1.1 lists some common challenges and correlating pro bono solutions.

FIGURE 1.3

Tracking Pro Bono Projects to Multiyear Goals

	Example 1: Update Volunteer Management Database	**Example 2: Create a Geographic Expansion Plan**
1 What is the specific task, process, or deliverable you are hoping to produce?	We need to modify the database to track volunteer hours and attendance (because)	We need to creat an expansion plan to support our transition to a new metro market (because)
2 Why is this important to meet your departmental or functional area goals?	We wish to implement a new recognition system for volunteers based on tenure of service (because)	We wish to understand the feasibility, costs, and expectations of entering the new market (because)
3 Why is this important to meet your annual organizational goals?	This year our goals include improving the retention and extending the average length of volunteer service (because)	This year our goals include supporting the planning for the opening of an office in one new metro area (because)
4 Why is this important to meet your multiyear, strategic priorities?	Our strategic plan states that we must increase the role of volunteers in our organization.	Our strategic plan states that we will expand to two new cities in the next three years.

TABLE 1.1
Common Needs Met Through Pro Bono Service

"We need to build stronger relationships with our donors and maintain those relationships over time."	• Donor database implementation • Fundraising executive coach • Donor segmentation • Donor relations strategy • E-newsletter design • Visual identity
"We need to make it easier for our target population to get involved and interact with our programs."	• Program evaluation • Market research • Client needs assessment • Marketing one-pager • "Competitive" analysis
"We need to raise the visibility of our services in the community."	• PR plan • Search engine optimization • Public service announcement development • Board recruitment process design • Event planning and production
"We need to reduce the time we spend on budgeting and forecasting."	• Budgeting process design • Accounting process design • Organizational budget design and development • Security systems audit • Database customization
"We need to improve our staff's experience so we can retain them for longer."	• Performance management system • Compensation and rewards audit • Training design • Volunteer manager training • Executive coaching • Training and development planning

Your Short List of Potential Projects

Once you've considered several approaches to drafting your potential project ideas, list them in Table 1.2 in order of priority.

TABLE 1.2
List of Projects of Interest

1.	Example: Market research
2.	
3.	
4.	
5.	

Now you are ready to take this list and test each potential project against the criteria for successful pro bono engagements.

Screening: Four Tests for Great Pro Bono Engagements

> "Pro bono is a great resource, but it's not for everything."
>
> —*David Flink, executive director and cofounder, Project Eye-To-Eye National*[3]

There are four key criteria in scoping pro bono engagements. We'll review each in more detail in the following pages. Ideally, you and your team will discuss the questions in this list for each of your projects of interest.

1. *Scope:* Can you clearly define the work that needs to be done? Do you feel confident that it won't change over the course of the project?
2. *Urgency:* When does this project need to be done? What are the consequences of not hitting that deadline?
3. *Knowledge Needed:* What knowledge about your field and your organization will the pro bono consultants need? Is the outcome worth providing that education?
4. *Staff and Board Readiness:* Would your team and board be open to having this project done (and done pro bono)? Do they have the time to be engaged on the project? Will they have time to implement the project deliverables?

If you don't vet your projects as carefully as if you were paying for them, you'll end up with projects that you don't really need—or that are set up to fail. Vetting projects is at the core of Principle Four for making pro bono work: Act Like a Paying Client. In contrast, if you take project selection seriously, you'll find out just how many items on your to-do list can be handled by the right pro bono provider.

Criterion One: Scope

> "Formula for success: underpromise and overdeliver."
>
> —*Thomas Peters*[4]

One of the greatest challenges in any project (paid or pro bono) is the potential for the project goals to shift and for the related work to expand. Nailing down the scope of work—what all parties agree the project will include and not include—is a good way to avoid this problem.

In our discussion of Principle One: Know and Define Your Needs in this book's introduction, we clearly highlight the danger of not having a well-defined scope—it jeopardizes the success of the project from the outset. One nonprofit leader says of a recent experience with ill-defined project scope, "I didn't know what I wanted and as a result we never got there; it wasn't clear and it prevented the team from getting traction." In contrast, if everyone involved can agree on a project outline and a list of project deliverables (such as documents, meetings, or systems), the project is on the right track.

At this stage, when you're vetting a project idea, you don't need a full scope document—all you need is a very basic outline of the project scope. You need to clearly define objectives to make sure the project is worth your time and is at least basically feasible for a consultant team. In most cases, you won't have key information such as the tasks, timeline, resources, workflow, and so on (for example, you may not have the technological expertise to describe the details of setting up a job applicant tracking system); so don't feel like you need to have nailed down everything that will happen and who will do what and when.

> How does scope differ in pro bono projects from scope in paid consulting?
>
> With paid engagements, a change in scope is addressed by charging the client for any extra time required. In pro bono work, the budget is simply time (and not money), so the team is asked to invest more time when there is a change in scope.

For example, does your new website need about twice the amount of content your current site displays, or are you mainly looking to refresh your existing site? Do you need a lot of the latest technological bells and whistles, or is your target audience not really on the cutting edge? This is the kind of information that you'll need in order to vet a project's feasibility and match with pro bono. Later in this stage, you'll build out a more detailed starter scope document that you can use as the basis for project discussions with any potential pro bono partners.

A common mistake that nonprofits make is proposing a scope that is too large, asks too much, or delivers things that aren't required for the proposed need. Certain projects tend to suffer from this problem more than others. Technology projects, for example, can have a wide range of options that can lead to significant scope creep. Another example is any human resources project: because human resources affects all staff members, the scope of an HR project can grow quickly. Projects in these areas can be quite successful, but you will need to watch the scope definition carefully. In contrast, the filing for legal incorporation is well defined and unlikely to grow in scope.

Resist the temptation to ask for everything on your to-do list. If you want a social media strategy, don't design the scope to reach all of your audiences—that's simply unrealistic. Instead, pick a single target audience and ask for three to five concrete tactics for using social media. That's a much more compelling request than simply requesting a social media strategy for everything you do.

> "Just like in building a house—everything takes twice as long as you think. With pro bono even longer. We have learned to chunk our projects into more bite size pieces so we can make sure we are always making progress."
>
> —*Itedal Shalabi, executive director, Arab American Family Services*[5]

Even if you can't reduce the scope of an ideal project significantly, you might be able to break it down into chunks so that it's more feasible for a pro bono provider, or a series of providers, to work with you over a longer period of time. Asking too much can often intimidate providers, leading to nothing at all, while being realistic about scope can get you a good part of the way to your goal.

Criterion Two: Urgency

> "I look for opportunities to use pro bono where the work needs to be done within the year but not immediately."
>
> —*Rimas Jasin, executive director, Presbyterian Senior Services (PSS)*[6]

Some projects are tied to specific, concrete deadlines. Given the nature of pro bono service, delivering on a specific and tight deadline can be

> A good pro bono project is one that is important but not urgent.
>
> And pro bono providers prefer enough lead time for a meaningful and productive engagement.

challenging. Pro bono service is best used for projects for which a potential slip of 50 percent on the timeline will not put your organization in jeopardy. Remember Principle Three: Be Realistic About Pro Bono Deadlines. Projects will rarely get done as quickly as you initially think they should.

Given this criterion, let's look at projects that would be "bad for pro bono" (important, but too urgent to be fulfilled) versus those that would be "good for pro bono" (important but with enough lead time for some slippage, as well as for thoroughness in execution and delivery).

Bad for Pro Bono

- Writing a business plan for a grant proposal that is due in three weeks
- Asking a pro bono consultant to plan and facilitate a staff and board collaboration exercise on short notice
- Developing a marketing plan to sell seats to an event happening in three months

Good for Pro Bono

- Developing a communications plan and writing press releases for an event that is scheduled six or more months in advance
- Developing a new employee policies manual for the upcoming fiscal year during the first half of the current fiscal year

Criterion Three: Knowledge Needed

> "Our work is complicated and we have found pro bono services have been most effective when they are more functional than strategic. It enables us to quickly get results."
>
> —*Robert Cordero, executive director, CitiWide Harm Reduction*[7]

How much will a pro bono team need to learn—about your organization, about your field, about the nonprofit sector—to be successful? All projects require some learning, and in pro bono, that's a good thing. For many business professionals engaged in pro bono service, it is their first time working in the nonprofit sector, and certainly for your nonprofit. Principle Five for good pro bono tells us that Learning Goes Both Ways, and it should—learning about what you do and how you do it is part of what is exciting for a pro bono provider, and serves as a great way to introduce new people to your mission.

A project with too steep a learning curve, however, will be difficult to complete. *In general, you should consider carefully any projects that require a lot of knowledge of your organization and field, as they will require you to invest significant time in transferring knowledge to the pro bono team.*

Certain projects are almost identical to their corporate parallels—designing a logo, for example, or conducting a lease review. These projects require little knowledge of the field or your organization. Others, such as nonprofit financial audits and program evaluation, use standard business skills but require significant knowledge transfer, and can quickly become time-consuming for your team.

In Figure 1.4, the upper-right quadrant indicates high-impact projects for which little investment in training is necessary—these are the most desirable, "high leverage" projects.

The upper-left quadrant indicates high-impact projects that require significant knowledge and training. These might have a significant positive impact on your organization, but tread carefully, as the time and resource investment to train might be draining.

FIGURE 1.4

Assessing Impact Versus Investment: A Four-Quadrant Model

	Significant Knowledge Needed	Minimum Knowledge Needed
High Impact	**Tread Carefully** • Large investment training pro bono consultants • Significant impact on your work *Example: Outsourcing the writing of the strategic plan*	**High Leverage** • Low investment training pro bono consultants • Significant impact on your success *Example: Facilitation by an outside expert of a guided strategic exploration at a board meeting*
Low Impact	**Time Suck** • Large investment training pro bono consultants • Low impact on your success *Example: Building out an excessive number of budgeting scenarios for the sake of comparison*	**Distractions** • Low investment training pro bono consultants • Low impact on your success *Example: Hiring a graphic designer to create the look and feel of the strategic plan*

The lower-right quadrant is occupied by low-impact projects that are much less significant; regardless of the fact that they require minimum knowledge and minimum training, they will likely serve as distractions rather than bring real value. These are not good projects, pro bono or otherwise.

Finally, the lower-left quadrant of the model represents those projects that are both low impact *and* require a large investment in training to impart a significant amount of knowledge. These projects are time wasters. Avoid them.

Criterion Four: Staff and Board Readiness

All pro bono projects require an internal team to support the process, even if that team is just you. Your internal team is a critical factor in following Principle Two: Get the Right Resource for the Right Job; you need a strong internal team as much as you need the right pro bono consultants. You can imagine the challenges you might face if your pro bono consultants lost motivation and interest in helping you during the course of their project work. Similarly, you need your internal team to be made up of people who both are excited to be working with a pro bono team and have the time to dedicate to the work. Remember that an internal team can include both *staff* and *board members*—the interaction between the two can be one of the great sources of value in a project.

Later in this section, you'll define an initial project team for a pro bono project you select. When vetting projects, however, you need to consider only two things:

- *Do critical internal team members want this project as much as you do?* We spoke with one executive director who worked for months to set up a pro bono project to revamp her website—but the project was squashed by her board because they didn't think a new website was necessary. Make sure the critical people at your organization have at least basically bought in to the project.
- *Do critical internal team members have the capacity to support the work?* Everyone at your organization might desperately want to revamp your new employee orientation, but if no one can supply the right information, provide feedback on the orientation, or deliver it when it's complete, the project will not be a success.

If you can answer yes to both questions, it's likely you can put together the right internal team for the job. Use Table 1.3 to start to sketch out a sample team. Keep in mind that all projects, large and small, require an internal project manager or point person, and that this person typically must devote two to five hours a week to managing the project, depending on the scope.

TABLE 1.3
List of Potential Team Members

Project	Who?	Available?	Motivated and Willing?
1.	Development director	Yes	Yes
2.	Program director	Yes	Yes
3.			

Having a hard time identifying a project manager or key contributor for a particular project? This could be a red flag that you may not have the needed staff available to successfully manage the project.

Your Three High-Potential Pro Bono Projects

Which of your projects of interest passed all four of the vetting criteria? In Table 1.4, list the one to three projects that pass the test and can be successfully completed on a pro bono basis.

TABLE 1.4
List of High-Potential Pro Bono Projects

1.	
2.	
3.	

Now that you've been introduced to the four criteria for scoping successful pro bono engagements, you'll be able to vet every potential engagement using these criteria. Worksheet 1.2, at the end of this stage, includes a set of project vetting flashcards to help you check potential projects against the four criteria.

Scoping the Project and Building an Internal Team

After you select a good prospective project, the next steps are to further clarify the initial scope and build your internal team.

Why do we talk so much about scope? Our work at the Taproot Foundation has taught us that a clear, realistic, mutually agreed-on scope is one of the most important factors in a successful engagement. This is no different, however, from fee-based consulting work. In a 2012 survey of Los Angeles nonprofits by the Los Angeles Information Exchange Committee, respondents highlighted key factors in successful contracted projects.[8] The top five factors all point to a careful scoping process:

1. The project results in a viable, realistic action plan that our organization can implement.
2. There is mutual trust.
3. The project stays within budget.
4. There is consistent and timely communication.
5. The contracted project plan is realistic.

If you can get it right at this stage, you'll likely still be getting it right at the end.

Defining an Initial Project Scope

In the end, creating a scope-of-work document should eventually involve all key players—the service provider, staff members with functional expertise, and board members. The scope-of-work serves as your roadmap, clearly defining what constitutes a successful outcome and the path to getting there, so it's essential that all players agree on it.

Although you can't finalize the project scope until you have your project team, you should take the time now to create the best scope-of-work you can, one that outlines the work required in a clear, tangible, and timely way, to the best of your knowledge. This work will ensure that you are prepared to make a strong and compelling case when you approach potential pro bono providers and will boost your confidence when making a pitch.

At this stage, you'll be looking for broad strokes, not too many details. Even if you've been thinking about a marketing plan long enough that you know exactly whom you want the team to interview, what five competitors they should review for materials, what time period the plan should cover, and so on, you might not want to add these details to your scope document just yet. A potential provider is going to want to be a part of defining the scope—don't scare them off by thinking you've preset every variable on the project or, worse yet, cast yourself in the role of project manager. You'll want the team to take some control, and therefore ownership, of the scope of work.

A scope document helps you avoid one of the most common pro bono pitfalls: scope creep.

Scope Creep: Unchecked growth and changes in a project's requirements (resources, budget, or time) that move the project further away from its original goal and therefore hinder its timely completion.

Who should help you develop the initial project scope? Ideally, a *staff member* who will manage the day-to-day responsibilities of the project or is accountable for the department to which the project most closely relates will take primary responsibility for exploring and articulating the project scope. This staff member might be you. *A board member* with professional expertise in a related area can also help you or a staff member translate the need into a clear scope of work.

What should a scope document include? Although you don't need all these items right now, a complete scope will typically describe:

- What the project will accomplish—a list of objectives or key deliverables, the number of expected or acceptable reviews or revisions, and any associated meetings or trainings
- What the project will not accomplish—a list of what is considered "out of scope"
- When the project can be considered done—a list of completion criteria
- Logistics—the total expected length of the project and a list of required resources

Right now, it's enough to take your best guess at each item. Even if you don't end up doing a project pro bono, you will almost certainly find this a useful exercise as you continue to plan the project with other resources—or decide against it for the good reasons you discover here.

Use the following steps for successful scoping to develop a clear scope template for each of your projects. Record answers in the blank scope template shown in Figure 1.5.

Step One: In Scope—What Will This Project Accomplish?

Describe the activities, deliverables or product, and specific "chunks" of work that will be accomplished by the individual or team. Where possible, include specific estimates of the quantity or depth of activity at that step—for example, the number of interviews you are hoping the team will conduct.

Eventually, you'll want your scope document to include specifics. For example, a well-defined scope created with the help of a pro bono provider might describe discovery like this:

FIGURE 1.5
Scope Template

Scope

In Scope

1.
2.
3.
4.
5.
6.

Out of Scope

1.
2.
3.

Completion Criteria

- Up to ten individual discovery interviews, and up to two focus groups with a maximum of six participants each, with research to be conducted over a total period of three months

At this stage, however, a good example of a section of an in-scope description looks like:

- Discovery research to learn more about the organization

And at this stage, a *bad* example of a section of an in-scope description looks like:

- Work to clear up internal confusion about who does what, by doing internal interviews

Step Two: Out of Scope—What Will Not Be Accomplished by This Project?

What you won't do is just as important as what you will do. Spell out in clear and explicit terms what won't be accomplished on the engagement. This typically includes those activities or goals that are closely related to or may commonly be expected from a project of this type, but will not be delivered for this engagement.

Eventually, a well-defined out-of-scope section created with a pro bono provider might look like this:

- This project will not cover creation or preparation of a style guide; development or printing of new press kit materials, new business cards, or other collateral; or updates of any kind to any online or web-based resources, and will not produce logos for related programs or services beyond a single organization logo.

At this stage, however, a good example of out-of-scope activity looks like:

- The team will not make more than one logo. The team will not create other brand resources.

And at this stage, a *bad* example of out-of-scope activity looks like:

- The team will not take on anything beyond a logo.

Step Three: Completion Criteria—How Will You Know When the Project Is Complete?

Identify a specific and clear end point that will indicate that the engagement has been successfully completed. This section should also include a reference to the right of both client and consultant to terminate the agreement with sufficient notice (two weeks, typically) to the other party.

Eventually, your completion criteria created with a pro bono provider might look like this:

- The project is complete when the consultant has delivered the final selected logo set and written instructions, and completed a staff training on how to use the logo. Alternatively, the project is complete when either the consultant or the client has decided that the project should be terminated and has notified the other party with at least two weeks' notice.

At this stage, however, a good example of completion criteria looks like:

- The project is complete when the consultant has delivered the logo and written instructions, and completed a staff training on using the logo.

And at this stage, a *bad* example of completion criteria looks like:

- The project is complete when we have a new face in the community.

In *Stage Four* you will learn more about the importance of *staff and board partnership* in scoping and managing projects. Setting this precedent in your earliest pro bono engagements will be helpful as you move to expand your use of pro bono.

Step Four: Logistics—What Timeline and Resources Are Important to the Project?

In this section, describe the ideal or mandatory timeline for the project, as well as any resources that must be present or provided to complete the project successfully. For example, you might need to set aside a printing and distribution budget for a white paper.

Eventually, a well-defined scope created with a pro bono provider might include detailed descriptions of necessary resources, such as:

- The client agrees to allocate up to $500 in funds for securing secondary research relevant to the project.

At this stage, however, a good example of describing necessary resources looks like:

- Several secondary research sources will be necessary to the project. If some require a fee, the consultant team will ask the nonprofit team if such costs are warranted.

And at this stage, a *bad* example of describing necessary resources looks like:

- The consultant team should locate all necessary resources.

Building Your Internal Team

"Eighty percent of success is showing up."
—*Woody Allen*[9]

Which skilled professionals on your staff would be a good fit for managing a particular pro bono project?

Think outside their standardized roles within the organization—the best contact for a marketing project, for example, might be someone who is especially good at working with diverse stakeholders rather than someone you consider a communications expert.

Next, let's think about the team you will assemble to manage and implement your priority projects. It's important to allocate enough resources to the project and also to be explicit about who is on the team and why. Assigning roles strategically and articulating a decision-making process can make the difference between success and failure in any project.

The following are key success factors for your internal team:

- Clearly defining roles
- Including team members who are motivated, engaged, and actively participating
- Establishing the terms of each person's participation from the beginning

Big project teams are not necessarily better—a bigger team complicates scheduling, and if you have too many people on the team, team members might find it easy to assume "someone else is taking responsibility for that" or think "that's not my job."

As you consider the possible team members for each of your projects, think carefully about the strengths that each would bring to the internal team, and try to balance experienced and junior staff members. Principle Five reminds us that Learning Goes Both Ways, and projects can be a great training ground for your team. But staffing your internal team with too many individuals who don't have the core skills for the project could force a pro bono consultant to spend much of the project doing basic training rather than the work of the project.

What roles are important to a project? In our work supporting nonprofit teams in pro bono projects, we've found that taking into account the following roles will increase the odds of a successful project:

- *Day-to-Day Contact:* Who will be the point person for your team and the pro bono consultant team?
- *Decision Maker:* Where does the buck stop for key decisions about the project?
- *Specialists:* Who has technical knowledge relevant to the project?
- *Post-Completion Implementation Team:* Who will ensure the project deliverables are used and maintained?

You might make changes to this list as you prepare for a project, but having a solid internal starter team will help communicate to potential pro bono providers your readiness for the work and ensure you're ready to go once you have secured a pro bono team.

Use Figure 1.6 to learn more about each role on your internal team.

Defining an Internal Team When Working with Different Types of Pro Bono Teams

Individuals—Even if you're working with only one pro bono consultant, your internal team will likely include multiple team members. The overall hours required will be fewer, but it is critical to involve multiple perspectives and stakeholders to ensure the success of the engagement.

Corporate Teams—If you bring in a team of pro bono consultants from a corporate or organization partner, your internal team should also identify the corporate *relationship owner* (for example, the board member who made the initial connection). While this individual may not provide feedback on project work or direction, it is important to keep the stakeholder or person who secured the support informed of how the relationship is progressing.

FIGURE 1.6

Your Internal Client Team

The Day-to-Day Project Manager

Someone who manages the work of the pro bono consultants, and ensures that they have what they need; participates in consistent communication.

Related Titles: Can be from any department or function, but typically someone related to the function the pro bono service is supporting. Can be of any level of seniority, but substantial organizational knowledge and functional area knowledge are helpful.

The Approvers

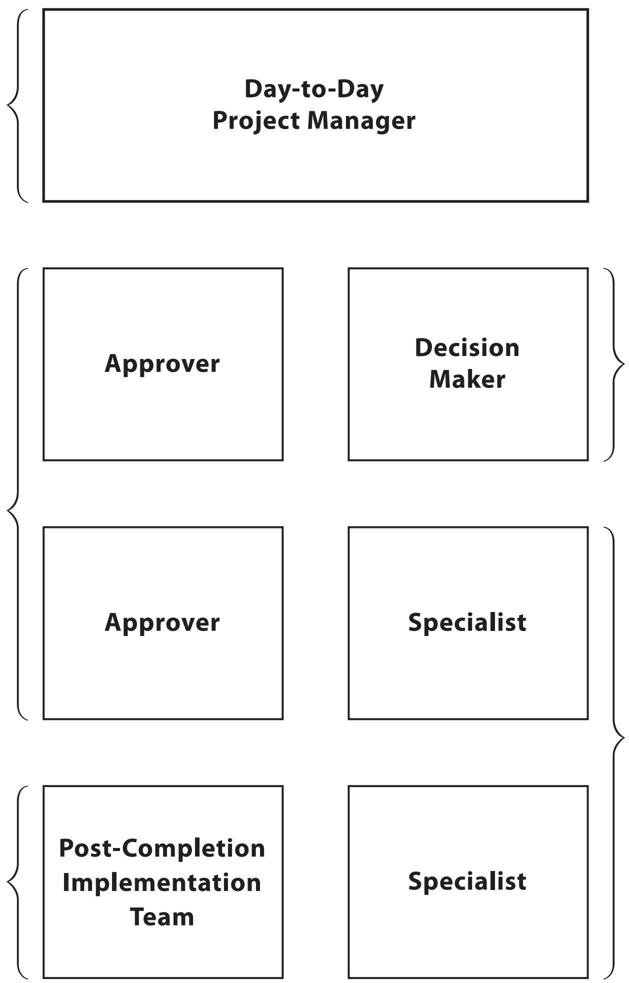
Someone who provides feedback and input to the engagement direction and deliverables produced. Can be up to two people.

Related Titles: Can be from any department or function; often a senior staffer related to the function the pro bono service is supporting. Deep organizational knowledge and functional area knowledge are highly beneficial. Helpful to have an approver who has undergone a similar process.

Post-Completion Implementation Team

Those individuals who will carry primary responsibility for sustaining and implementing the deliverables or resulting action items.

Related Titles: Can be from any function or level of seniority. Organizational knowledge is helpful.



Decision Maker

An individual with ultimate executive decision-making power to provide affirmation or push back at key milestones and decision points in engagement. Should be able to represent the viewpoint of key stakeholders.

Related Titles: Executive director, development director, director of related functional department. Appropriate person is dependent on the impact and focus of the engagement.

The Specialists

Those with technical knowledge related to the process or end impact of the engagement. Provide information while the consultants are collecting insights to support deliverable creation.

Related Titles: Typically someone related to the function the pro bono service is supporting. Knowledge of the organization is helpful. Diverse perspectives are helpful to provide multiple angles for consideration by the consultants.

On our projects, one person often wears multiple project hats. In describing roles, we are describing *core responsibilities,* not necessarily individuals. For smaller pro bono undertakings, it wouldn't be at all uncommon for a single person to be the day-to-day contact, the decision maker, and a specialist. As long as you follow the *intent* of the roles—gathering a range of perspectives, ensuring that stakeholders provide input before a deliverable is considered final, knowing how you make decisions before a decision arises—you can create a far smaller team than what we've described.

More complex projects, however, often require more person power, so if you're working on something with a larger scope or a larger team of pro bono consultants, you'll want to try to fill each role with an individual to ensure the project stays on track.

Building a Consultant Team

> "The formality of the roles of the pro bono consultants at first seemed overly formal and structured. At the end of the day, though, it was this approach that saved the project when there were bumps."
>
> —*Sean Pica, executive director, Hudson Link for Higher Education in Prison*[10]

After you have described your internal team, you should spend some time thinking about the consultant team. Whom do you think you need to do the work you're describing? Defining the consultant team isn't your job alone, of course. If you work with a professional services firm or corporation, that organization will likely suggest a full team. Even if you are recruiting a full team with team members from different backgrounds or corporations, you'll likely start by recruiting one person who can help you bring on the rest of the team. In both cases, the pro bono consultants bring great knowledge about who can best do this work, while you'll bring your feedback and personal work preferences.

In the interim, however, you can spell out what you think is most important on the project team. For example, are there special skills you think are necessary? Why? Think about external teams with which you've had particular success: what made them a good match for the project or the organization? We don't expect you to be able to identify the four roles that you'll need to bring on board to create an HR assessment and plan. But you might already know that you want a communications specialist on the team, because you've heard a thousand times that communications is a pain point for your staff. That type of information will be helpful as you start to recruit pro bono providers.

Creating a Roles and Responsibilities Template

> "We understood that the Taproot pro bono team had to learn about our business and our priorities in order to create a tailored, relevant product for us. At the same time, we recognized that the pro bono team were professionals balancing multiple projects, and we needed to be strategic and respectful of their time. So, we identified a staff liaison to the pro bono team, and we created opportunities for them to observe client activities, meet the staff, and in a short time, learn our business. Having clarity of team member roles, project goals, outcomes, and timelines helped everyone stay focused and on task during the project."
>
> —*Sharen Duke, executive director, AIDS Service Center NYC (ASCNYC)*[11]

Using your descriptions of the client and consultant teams, draft a roles and responsibilities template (see Figure 1.7). Together with the

FIGURE 1.7

Roles and Responsibilities Template

Roles and Responsibilities

Client Team

Role	Skills Needed	Name
1. Day to Day		
2. Decision Maker		
3. Recommender		
4. Specialist		
5. Specialist		
6.		

Consultant Team

Role	Skills Needed	Name
1. Point Person		
2. Decision Maker		
3. Specialist		
4. Specialist		
5. Specialist		
6.		

scope document, this document will provide a clear and tangible summary of your project goals and expectations. These two documents are critical in securing and prospecting for potential providers and, once the project gets going, guiding work between the consultants and your internal team.

Conducting a Pre-Mortem

As you move forward with your selected project or projects, you can test the proposed project scope by conducting a pre-mortem.[12] Unlike a *post-mortem* (in which you write down what didn't work), a pre-mortem serves as a kind of pre-engagement risk assessment in which you envision ahead of time the intentions, ideal outcomes, and what could go wrong.

This process can be as simple as asking a few key questions. Assume everything went horribly wrong with your project. What happened? Why did it fail?

If you have more time, think about it in more detail. As in a dress rehearsal, try to think about the project at its completion. Go back to the four criteria for evaluation at the start of this stage. Are there any "red flags" (serious deficits in any of these four areas)? For example, was the scope too difficult to clearly define? Was a deadline coming up too soon? Did the project require too much specialized knowledge? Were there key team or board members who were too overextended to be engaged?

If you really want to get at key risks, you can conduct a pre-mortem exercise with internal team members after you've briefed them on your project plan.

1. Start the exercise by informing everyone that the project has failed spectacularly.
2. Ask the team to spend a few minutes writing down every reason they can think of for the failure—especially the kinds of things they ordinarily wouldn't mention as potential problems, for fear of being impolitic.

    Example 1: An annual report was designed in multiple colors and for glossy paper, but the final product couldn't be used because the nonprofit had planned to do all printing in-house and didn't have color or glossy capabilities.

    Example 2: A staff member is working with a pro bono consultant on database upgrades, but is pressured by the executive team to overhaul a knowledge management site at the same time. The staffer doesn't have time to manage the database engagement, and the pro bono consultant, after waiting without word for weeks, leaves the project.

3. Next, ask each team member to read one reason from his or her list. Have everyone state a failure reason in turn, until you've recorded all possible reasons for failure.
4. After the session is over, review the plan. Your list of reasons for failure in the pre-mortem is now your list of risks as you go forward. Is there anything you can change in the project scope or team documents to address these risks?

In addition to helping teams identify potential problems early on, this exercise serves a number of team-building purposes:

- It can help deflate the kind of damn-the-torpedoes attitude of people who are overinvested in a project, the ones who cry "Full steam ahead!" despite known risks.
- In describing weaknesses that no one else has mentioned, team members feel valued for their intelligence and experience, and others learn from them.
- It sensitizes your team to pick up early signs of trouble once the project gets under way.
- It helps you gain buy-in from staff, board members, and other potential stakeholders. By making time for participation and criticism before the project kicks off, you can gain advocates and quell concerns.

This activity is not meant to undermine the project or drain your support; it's important to reiterate that every project has these risks, and by honestly assessing the challenges you face, your projects will have a higher success rate.

Use Table 1.5 to complete the pre-mortem exercise for each of your selected projects.

TABLE 1.5
Pre-Mortem Exercise

Project	Risks	Risk Mitigation
Example: HR Assessment and Planning	Team won't understand our culture and what we value. Team will set expectations with our staff that we can't fulfill. Team will see some of our messes and think we are terrible.	Expose the team to some of our key culture touch points and express our fear to them. Share this concern with the team and ask them to be very careful about signaling actions. Be transparent and let them know where you know you need to invest.
1.		
2.		
3.		

WORKSHEET 1.1
To-Do List–Based Needs Assessment

1 What is the specific task, process, or deliverable you are hoping to produce?	List the specific task or action.
2 Why is this important to meet your departmental or functional area goals?	List the annual departmental goal addressed through this project.
3 Why is this important to meet your annual organizational goals?	List the annual organizational goal addressed through this project.
4 Why is this important to meet your multiyear, strategic priorities?	List the multiyear strategic priority addressed through this project.

WORKSHEET 1.2
Project-Vetting Flashcards

Criterion #1: **The scope is clearly defined.**

- ☐ You can clearly state the objectives and key deliverables of the project.
- ☐ You have a clear sense of the total number of hours and total duration of work (in weeks or months) required to successfully complete the project.
- ☐ You can state the desired short-term and long-term outcomes of the project.
- ☐ You can clearly communicate the connection between this project and departmental or organizational goals.

Criterion #2: **The project meets an important but not urgent need.**

- ☐ Your ability to benefit from the pro bono engagement would not be significantly affected if the engagement took up to 50 percent longer than expected.
- ☐ The objective or deliverables of this engagement are important to your organization, and you would not find alternative ways to complete the work if pro bono were not an opportunity.
- ☐ You can clearly state the tie to your mission and strategic plan.

Criterion #3: **The level of field-specific education needed by consultants does not outweigh the benefits of their work.**

- ☐ For projects that are high impact: consultants may require *high investment* to be successful and properly prepared to complete the work, but the time spent for training is justified by a high-impact project result.
- ☐ For projects that are medium impact: the project requires *moderate investment* (or less) of training and management time in order for the consultants to be successful.
- ☐ For projects that are low impact: the project requires minimal investment of training and management time in order for the consultants to be successful.

Criterion #4: **The required team members from your staff are receptive and available.**

- ☐ You have the required skills on staff to effectively manage the pro bono engagement.
- ☐ The staff who are qualified to serve as engagement managers, subject matter experts, or decision makers are both receptive and available to serve in their respective roles.
- ☐ One or more board members are open to being involved in the scoping, securing, and managing of the pro bono engagement.