

The Pro Bono Initiative Strategy and Project Plan Executive Summary

Goal: Leverage \$1 billion annually in pro bono service to the nonprofit sector in order to create more efficient paths to achieving significant, beneficial outcomes for communities.

Overall Objectives:

- Secure 100 commitments – the equivalent of \$1 billion in pro bono service – from corporate CEOs by the end 2010.
- Create a common understanding of what pro bono service is and the mutual benefits that exist for corporations and nonprofit organizations.
- Develop a broad-based coalition among various key influencer groups including corporations, professional service firms, universities, trade media and associations, and nonprofit organizations.
- Identify and promote effective strategies for expanding pro bono service.
- Identify key leaders to play an ongoing role in supporting and leading the movement.
- Establish a recognition program to honor exemplary pro bono commitments and further qualify the value of pro bono service.

Background:

The growth of professional services as a part of the American economy has produced an army of potential skilled volunteers. According to Department of Labor statistics, more than 6.7 million Americans have professional skills that are needed by the nonprofit sector.

The nonprofit sector is the fastest-growing sector of the U.S. economy, driven by nonprofit ability to efficiently meet America's needs for social services, education, health care, environmental protection, cultural enrichment, and all of our other efforts to make this a richer, more civil society. Yet the nonprofit sector has a chronic unmet need for investment in its own infrastructure and service capacity that inhibits its growth.

In research conducted earlier this year by Deloitte, 77% of nonprofit leaders believe that pro bono services could significantly improve their organizations' practices, yet only 12% of nonprofits actually secure those pro bono services.

There is enormous potential to address many of America's social and economic development needs by engaging America's labor force of skilled professionals in voluntary, pro bono service. But how do we expand the pro bono ethic beyond the legal and medical professions? How can corporate leaders enable their employees to engage in pro bono service? How does the expectation of pro bono service get instilled in the business professions? And do we even have a basic, common understanding of what pro bono service means?

In early 2006, the Taproot Foundation approached the UPS Foundation and the President's Council on Service and Civic Participation about collaborating in order to grow the pro bono movement. Shortly thereafter, the Corporation and USA Freedom Corps were engaged. The

plan and strategy that follows is a result of those initial conversations and the months of committee work that have followed (*see collaborators for details*).

Defining Pro Bono:

For this initiative, **pro bono service** is defined as organizations (corporate, public, philanthropic, higher education) and/or their employees using their corporate assets and skill sets to volunteer, donate, or provide reduced-cost **management services** that improve the scale, sustainability, and operations of nonprofit organizations so that they can more efficiently and effectively achieve meaningful outcomes for communities.

Management services may include but are not limited to:

- Strategic and Business Planning
- Fundraising and Development
- Human Capital and Organizational Development
- Marketing and Communications
- Finance and Accounting
- Information Technology
- Legal Counsel*
- Logistics
- Product Development

Because of the existing prevalence of pro bono within the legal community, we are focusing our efforts more broadly on other management services.

Pro bono services can also take the form of other skilled volunteer efforts such as medical professionals donating their services free or charge or volunteering their medical skills to communities through nonprofit clinics or intermediaries. Again, for the purposes of this initiative, we are focused on pro bono management services.

Pro bono *is not* synonymous with:

- Corporate volunteering;
- Corporate philanthropy;
- In-kind or product donations; or
- Skilled volunteering (which can include skilled labor such as electricians, plumbers, teachers, landscapers, pilots, etc.)

Rather pro bono is a type of skilled volunteering that can be part of a company or institution's overall volunteering or philanthropy portfolio. Individuals may also volunteer pro bono services outside their relationships with their employer or university.

Project Elements:

The Pro Bono Initiative includes four key elements, which collectively combine event-focused strategies, creation of a new recognition program, ongoing outreach and corporate development, and related media and marketing activities. Below is a brief summary of each and their interdependencies.

Pro Bono 100

Through the Pro Bono 100, the President's Council is challenging the business community to leverage the transferable skills and talents of their employees to build the institutional strength of the nonprofit sector.

The initial goal of the program is to secure at least 100 corporate commitments or the equivalent value of \$1 billion in pro bono service over the next three years (by the end of 2010).

Thereafter, the goal would be \$1 billion generated in pro bono service annually.

The Summit on Corporate Volunteerism: Toward a New Definition of Pro Bono

The purpose of the Summit, February 12-13, 2008, in New York City, is to create a vision for expanding the pro bono service ethic in the business community and inspire CEOs to make corporate commitments and become founding members of the Pro Bono 100.

The target audience is corporate CEOs (and their invited guest). The summit, held in New York City, consists of a CEO reception February 12, from 6 to 8pm, at the Harvard Club and a half-day summit on February 13, from 8:30am to 1:30pm, at Citigroup Corporate Center.

The reception will feature keynote speaker Tony Dungy, head coach of the Indianapolis Colts and member of the President's Council, and Mike Eskew, retiring CEO and Chairman of UPS. Pro Bono Awards will be presented to McKinsey, GE, The Monitor Group, Pentagram Design, Harvard Community Partners, and The Ad Council for their outstanding commitment to pro bono service.

The half-day summit will feature keynote speakers and plenary sessions on pro bono and related topics. Both events will provide an opportunity to announce Pro Bono 100 commitments and promote effective strategies for actualizing those commitments.

Note: We have also reserved time and space in conjunction with the National Conference on Volunteering and Service to host a related roundtable, plenary, or workshop session with conference attendees.

Pro Bono Working Session

As a follow-up to the Summit (date TBD), the Taproot Foundation will lead and convene a daylong working session of a broader coalition of representatives from the following industries and sectors:

- Senior executives from corporations and professional consulting firms;
- Administrators and faculty from institutions of higher education and professional schools;
- Leaders from trade associations;
- Public officials; and
- Leaders from national nonprofits and other intermediary groups.

The President's Council, CNCS, and other interested collaborators would play a supporting role in this follow-up strategy with the Taproot Foundation taking the lead in conceptualizing and implementing this event.

Related Media and Promotion

CNCS, with support from its agency of record Hill and Knowlton, will also pursue media outreach and opportunities to promote the Pro Bono 100 and the Summit events. Publications and printed materials will also be produced to support the Pro Bono Summit and Pro Bono 100.

Conclusion

On a parallel track with these Pro Bono Initiatives, CNCS will continue to seed and support efforts to assist the nonprofit sector in reinventing volunteering and preparing for how to better leverage pro bono management services from corporations and skilled volunteers. These include but are not limited to:

- Developing and promoting related training and technical assistance through the National Service Resource Center;
- Conducting workshops and webinars on strategic volunteer capital planning;
- Encouraging state service commissions and other national service grantees to conduct state and local pro bono summits; and
- Providing national service resources and grants to strengthen volunteer management capacity within the nonprofit sector.