

# TRENDS & BEST PRACTICES

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Taproot Foundation  
CVC of Greater Boston | March 28, 2016

**Introductions**

**Defining the Topic**

**Key Trends in the Field**

**Best Practices**

**Q&A**

# TAPROOT FOUNDATION

Our mission is to **drive social change** by **leading**, **mobilizing**, and **engaging** professionals in **pro bono service**.

[www.taprootfoundation.org](http://www.taprootfoundation.org)



## PROGRAMS

Connect nonprofits and social change organizations to talented business professionals through a variety of Taproot-run programs, ranging from 1:1 consultations to team-based long-term projects, both locally or virtually



## CORPORATE ADVISORY SERVICES

Consult with companies to design and implement pro bono employee engagement programs.



## FIELD BUILDING

Convene leaders both domestically and globally, and conduct and publish research to advance the pro bono movement.

# TAPROOT FOUNDATION



**15 Years**

OF BUILDING THE  
PRO BONO  
MOVEMENT



**4,000**

SOCIAL CHANGE  
ORGANIZATIONS  
SERVED



**5,900**

PRO BONO  
ENGAGEMENTS



**13,700**

SKILLED  
VOLUNTEERS  
ENGAGED



**1.4 M**

HOURS OF PRO  
BONO SERVICE  
DELIVERED



**\$150 M**

\$ VALUE  
DELIVERED

# SPECTRUM OF CORPORATE COMMUNITY ENGAGEMENT

Nonprofit Needs	MAKING BUDGET	“EXTRA HANDS” TO DELIVER SERVICES/PROGRAMS	INFRASTRUCTURE AND LEADERSHIP		
Types of Support	FINANCIAL SUPPORT	HANDS-ON VOLUNTEERING	SKILLS-BASED VOLUNTEERING		
			GENERAL SKILLS	BOARD SERVICE	PRO BONO PROFESSIONAL EXPERTISE
Examples of Common Activities	<ul style="list-style-type: none"> <li>▶ Cash grants</li> <li>▶ Dollars for Doers</li> <li>▶ Matching gifts</li> </ul>	<ul style="list-style-type: none"> <li>▶ Playground clean-up</li> <li>▶ Soup kitchen</li> <li>▶ Planting a garden</li> </ul>	<ul style="list-style-type: none"> <li>▶ Tutoring</li> <li>▶ Literacy programs</li> <li>▶ Career mentoring</li> </ul>	<ul style="list-style-type: none"> <li>▶ Board placement</li> <li>▶ Board member training</li> </ul>	<ul style="list-style-type: none"> <li>▶ IT assistance</li> <li>▶ Marketing collateral design</li> <li>▶ HR consulting</li> <li>▶ Legal counsel</li> </ul>

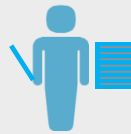
Taproot Foundation, 2008.

# GENERAL SKILLS-BASED VOLUNTEERING



## MENTORING

Mentoring youth on life-skills, college and career readiness



## FINANCIAL LITERACY PROGRAMS

Providing financial literacy training to individuals



## CAREER COACHING

Sharing professional experience, coaching and advice

## A GOOD FIT FOR:

- ▶ Engaging a high volume of employees
- ▶ Including a broad array of employees across disciplines and skill levels
- ▶ Outsourcing to an intermediary/third party to provide curriculum, manage

# PRO BONO SERVICE

## A GOOD FIT FOR:

- ▶ Long-term, capacity-building impact on the nonprofit
- ▶ Significant professional development for employees
- ▶ Showcasing the company's strengths and expertise



### LOANED EMPLOYEE

Employees are granted a short-term leave or rotation to be embedded within an organization for a period of time, either domestically or abroad



### FUNCTIONAL COACHING AND MENTORING

Employees are matched with their nonprofit peers to share functional expertise



### MARATHON

Pro bono projects specifically scoped to be completed in one day. Often an event pooling multiple projects happening on the same day



### STANDARDIZED TEAM PROJECTS

Individuals are placed on a team, each with specific roles and responsibilities. Projects are scoped and structured around specific deliverables.



### OPEN-ENDED OUTSOURCING

A company makes its services available to specific nonprofit organizations on an ongoing, as needed basis



### SECTOR-WIDE SOLUTIONS

Creating a deliverable *pro bono* that that can be applicable to many nonprofits across an issue area or category



### GENERAL CONTRACTING

An entity coordinates bringing together pro bono resources from multiple sources to collaborate addressing a specific problem



### SIGNATURE ISSUE

Combining formal pro bono work of any model with other corporate assets for the purpose of investing significant internal resources against targeted issue

Taproot Foundation, 2010.

# EXAMPLES: PRO BONO SERVICES



Photo: Connor Radovich, The Chronicle

Pro bono projects specifically scoped to be completed in one day. Often an event pooling multiple projects happening on the same day.

EX: [Kaiser Pro Bono Marathon](#)



Photo credit: Anthony Sanchez

Volunteers are staffed on a team-based consulting project addressing a specific scope of work in their area of expertise. Often lasts around 3 months.

EX: [American Express Serve2Gether Consulting](#)



**HOSPITALITY**  
+ **SERVICE**  
Bringing Hospitality to Your Community

Volunteers use their professional expertise to develop resources, solutions etc. that can be applicable to many organizations across an issue area or type.

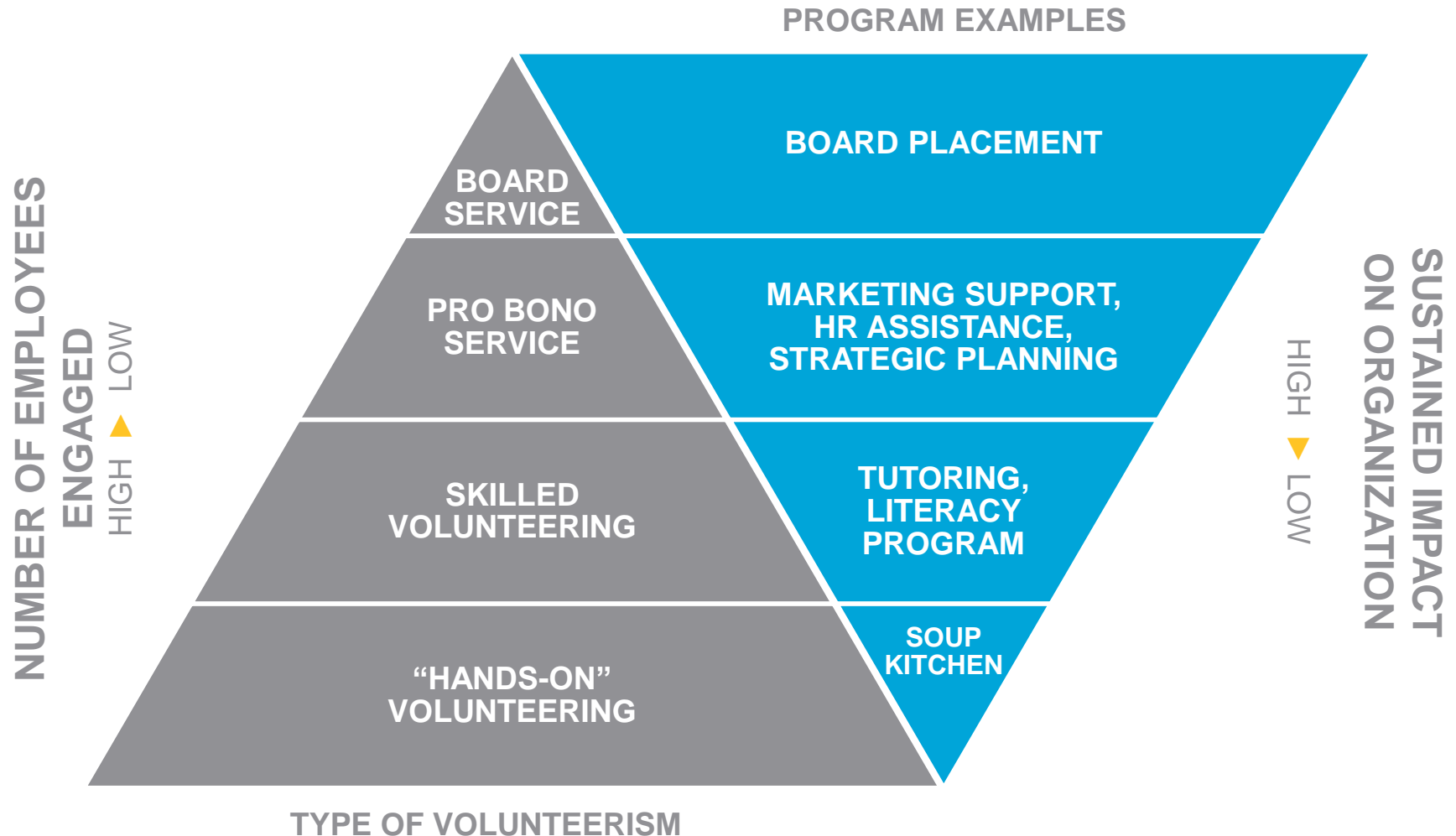
EX: Hilton's [Hospitality+Service Curriculum](#)



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# EMPLOYEE ENGAGEMENT AND IMPACT



**Introductions**

**Defining the Topic**

**Key Trends in the Field**

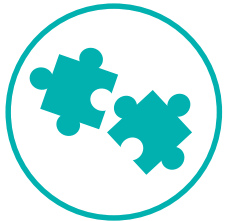
**Best Practices**

**Q&A**

# KEY TRENDS IN THE FIELD



Growth



Integration



Scale

# BY THE NUMBERS

**2/3**

of resources generated by nonprofit board members were **PRO BONO**

**4 million+**

**LINKEDIN** members indicated interest in doing pro bono



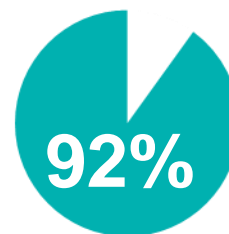
Percentage of nonprofits that report having access to the pro bono services they need

**66%** of the **millennial** workforce would prefer to work at a company that provides opportunities to **apply their skills to benefit nonprofit organizations**

**20** Number of the top 25 **BUSINESS SCHOOLS** that have pro bono programs

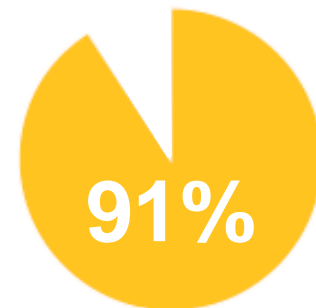
Conservative average value of pro bono services **\$150/hr**

According to CECF's annual survey, pro bono and board service have been the **fastest growing CSR programs** for



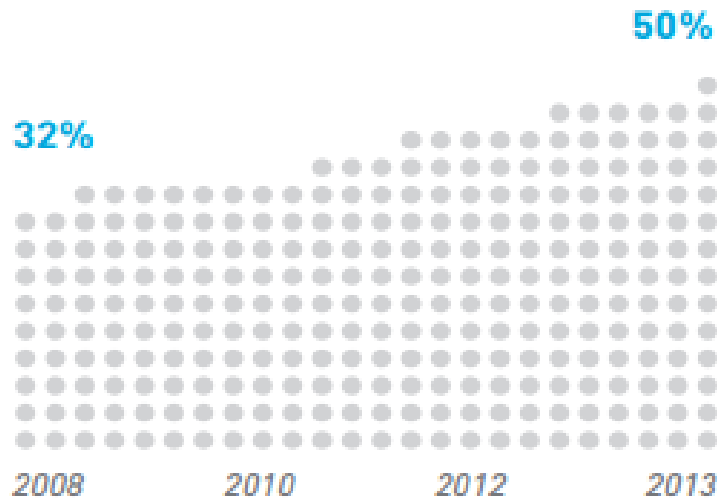
of nonprofits want more **PRO BONO**

**3+**  
**YEARS**



of professionals are interested in joining a board if pro bono and in-kind were their expected contribution

# PRO BONO HAS BECOME THE FASTEST GROWING CSR PROGRAM

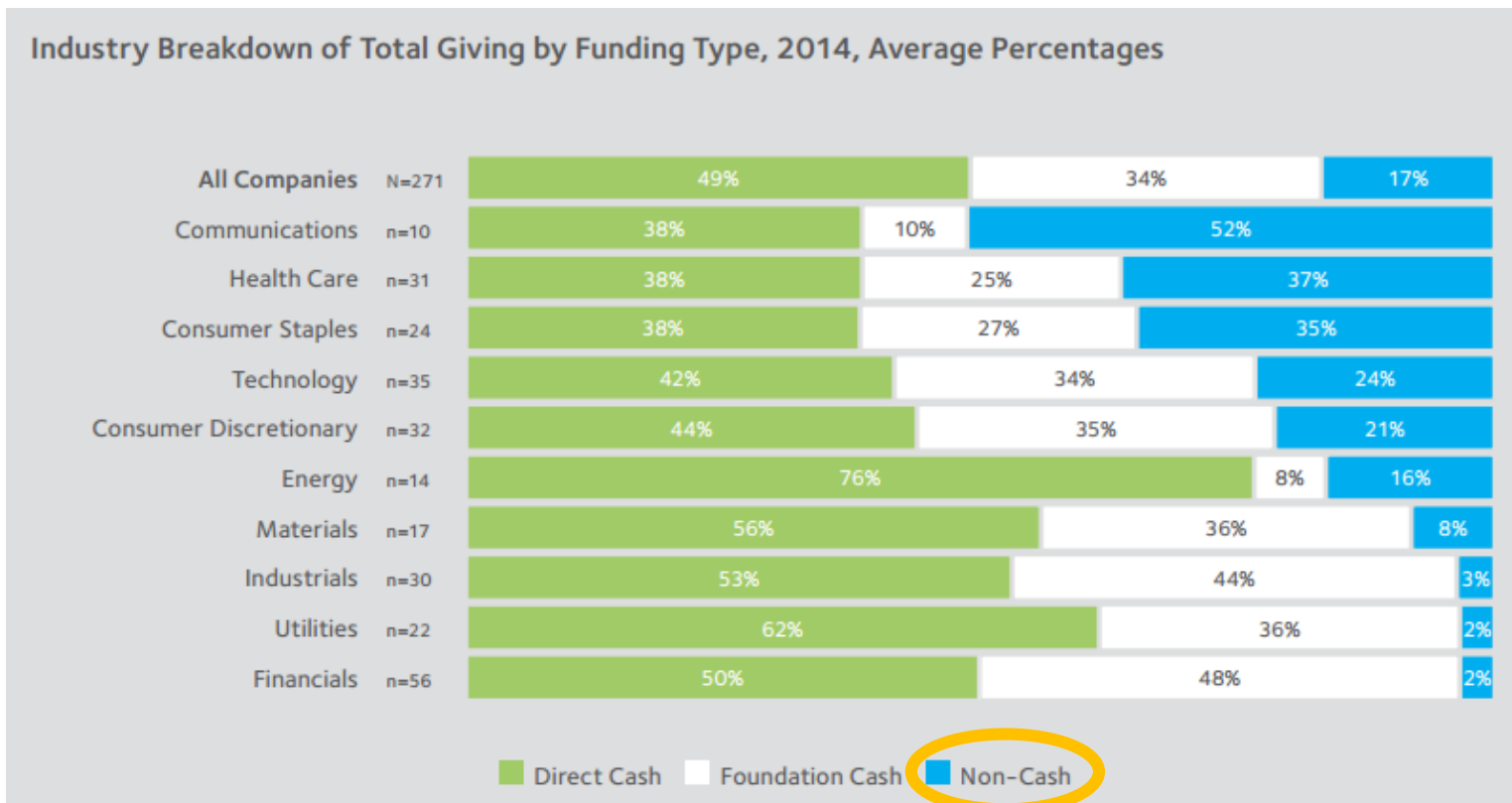


By 2013 alone, **50%** of CECF respondents indicated having a pro bono program, and up to **54%** by 2014.

Source: 2014 Edition: Giving in Numbers. [www.cecp.co/gin](http://www.cecp.co/gin)

# PRO BONO HAS BECOME THE FASTEST GROWING CSR PROGRAM

And now frequently equals or approaches the dollar value of direct cash giving



Source: 2015 Edition: Giving in Numbers. [www.cecp.co/gin](http://www.cecp.co/gin)

# HR IS INCREASINGLY RECOGNIZING THE VALUE OF CSR PROGRAMS

- ▶ **91%** of HR professionals believe that skills-based volunteering can be an effective way to develop leadership skills<sup>2</sup>
- ▶ Skills-based volunteers at HP are **38%** more likely to have the highest level of employee morale than non-volunteers<sup>1</sup>
- ▶ **90%** of Capital One managers reported improvement in employees' leadership skills after pro bono service<sup>3</sup>

<sup>1</sup>Hewlett-Packard, 2013

<sup>2</sup>Deloitte Volunteer IMPACT Survey, 2008

<sup>3</sup>The Civic 50, Points of Light and the National Conference on Citizenship, 2013

# CASE STUDY: HR INTEGRATION

## MetLife

MetLife considers leadership development for employees a top priority. Especially during a time when many companies are reporting a leadership gap stemming from a shortage of skills to excel in today's work environment, MetLife understands that the evolving and competitive field of leadership development demands dynamic experiential learning opportunities that develop leaders by putting them in new contexts and high-stakes situations. MetLife's HR and Foundation teams joined forces to envision how pro bono could fit into their leadership development efforts. They worked together with the shared belief that a pro bono initiative would not only deepen the company's investment in its nonprofit partners, but would also develop the competencies of its future leaders.

To execute on their vision, MetLife built a pro bono component into its existing Global Leadership Development Program (GLDP), a selective 4.5 year program for MBA graduates. To pilot the program, the GLDP cohort engaged in tightly-scoped consulting sessions to build the marketing and business strategies of MetLife's nonprofit partners. Employees were grouped and assigned to pro bono project opportunities based on the match of their expertise to the unique needs of the nonprofit. "By including pro bono as a core element of our Global Leadership Development Program, we have immediately multiplied the impact of our investment by building the capabilities of our future leaders while leveraging their unique skills to strengthen our community giving overall," says Eric Goldberg, Assistant Vice President, Talent Management.

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*Eric Goldberg, Assistant Vice President,  
Talent Management, MetLife.*

MetLife is confident the skills its emerging leaders will gain from this unique cross-sector experience will help prepare them to lead in an ever-evolving business world. MetLife looks forward to making pro bono a mainstay in program for years to come.



# DEFINE WHAT SCALING MEANS FOR YOU

What kind of “scale” do you want to achieve?

EXPANDING  
NATIONALLY OR  
INTERNATIONALLY

INCREASING THE  
VOLUME OF  
NONPROFITS  
SERVED

INCREASING THE  
DIVERSITY OF  
NONPROFIT NEEDS  
ADDRESSED

ENGAGING MORE  
DEPARTMENTS OR  
LINES OF BUSINESS

MAKING  
PARTICIPATION  
AVAILABLE TO MORE  
EMPLOYEE POOLS

# EXPLORING A PATHWAY TO SCALE: VIRTUAL SERVICE

## Why is this relevant?

- ▶ Mergers/acquisitions rapidly expand the footprint of a single company
- ▶ Continued shift to remote workforce
- ▶ Workplace flexibility
- ▶ Global brands looking for presence and impact outside of the “backyard”

# VIRTUAL MODELS: THE MUST-HAVE LIST

- ❑ Deep investment in ongoing nonprofit outreach, readiness preparation, and scoping
- ❑ Targeted volunteer recruitment, vetting, and preparation
- ❑ Informed matching, mutual consent
- ❑ Ongoing oversight
- ❑ Tracking and evaluation

# SAMPLE VIRTUAL MODEL: TAPROOT+

TAPROOT<sup>+</sup> for 

[Sign in](#)

## TAPROOT<sup>+</sup> YOUR COMPANY

Taproot+ is a seamless way for nonprofits to find pro bono help and for skilled volunteers to provide it. We've partnered with Your Company to offer volunteers and nonprofits direct access to a curated marketplace for pro bono.

Welcome to the Taproot+ portal for Your Company. As an employee, you'll be able to join your peers to browse, apply for, and execute high-impact pro bono projects for nonprofits in need. Learn more about how Taproot+ works in the short video below, or in the recorded webinar here. To learn more, [visit the website](#).

### Nonprofits

Post your organization's need and we'll match you with a qualified volunteer, free of charge

[Get started](#)

### Skilled Volunteers

Find a project that fits your skill set for an organization that needs your help

[Find a Project](#)

## Featured projects

Or browse [all projects](#) associated with this campaign



Website design

### Website design for NationBuilder

New Voices for Reproductive Justice

🕒 Estimate: 6 weeks (30 hours)

📍 Pittsburgh, Pennsylvania

📞 Can be done remotely



Website design

### Design revamp for website World Cares Center Inc.

🕒 Estimate: 6 weeks (30 hours)

📍 New York, New York

📞 Can be done remotely



Multimedia

### Single day video shoot San Francisco Child Abuse Prevention Center

🕒 Estimate: 6 weeks (30 hours)

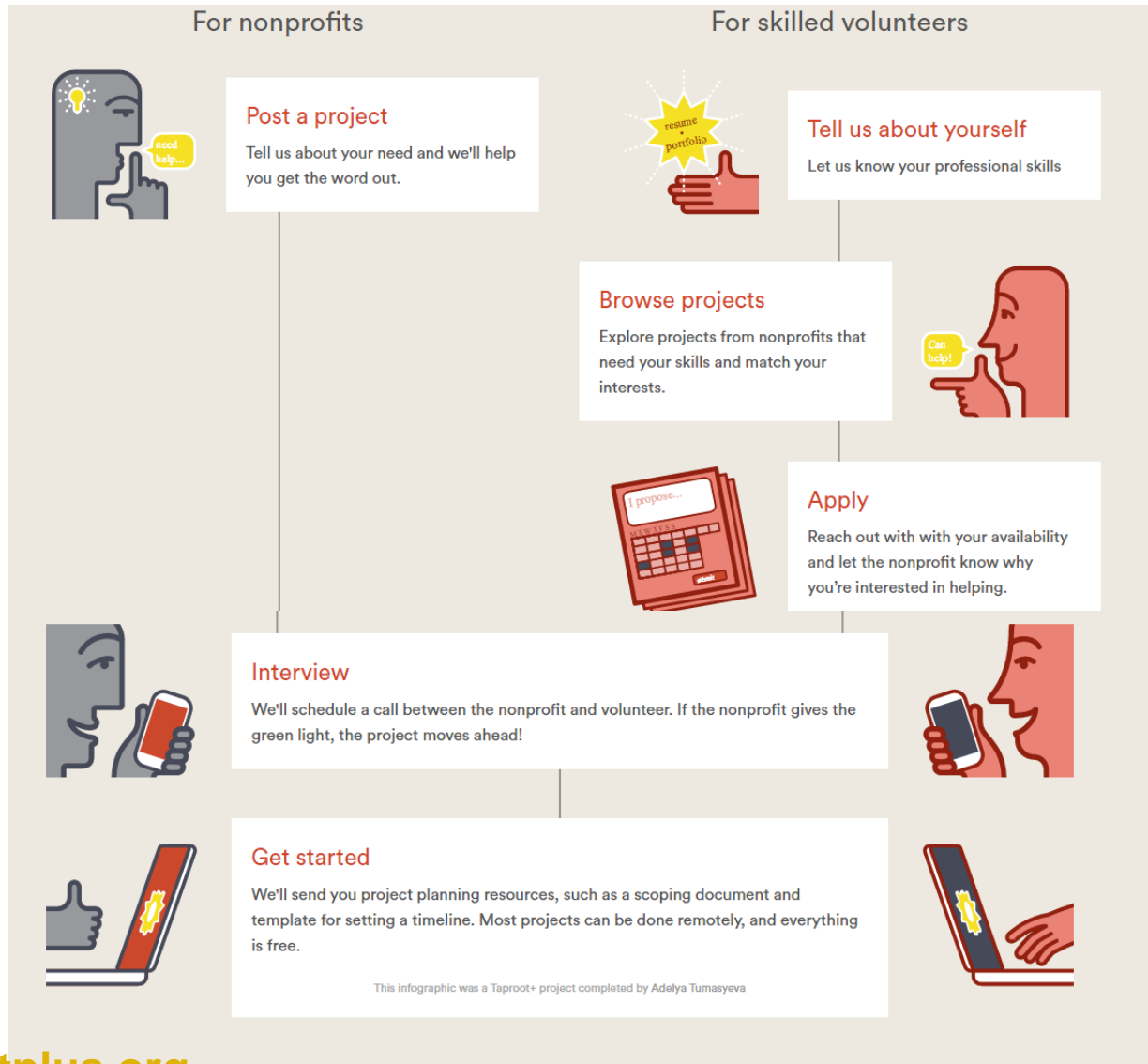
📍 San Francisco, California

👤 Local volunteer only

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# SAMPLE VIRTUAL MODEL: TAPROOT+



# SAMPLE VIRTUAL MODEL: TAPROOT+

TAPROOT<sup>+</sup>

[Browse projects](#) [Create a project](#) [Sign in](#)

Use the below list to sort projects by category. Log in to show recommended projects based on your own skillset.

Accounting & Finance

All issue areas



TAPROOT<sup>+</sup>

[Browse projects](#) [Create a project](#) [Sign in](#)

Accounting & Finance

## Accounting processes and systems

Ayeish

- 🕒 Estimate: 6 weeks (30 hours)
- 📍 Washington, D.C.
- 📧 Can be done remotely

Accounting & Finance

## Financial audit

Enchanted Makeovers

- 🕒 Estimate: 6 weeks (30 hours)
- 📍 Taylor, Michigan
- 📧 Can be done remotely



## CANINE COMPANIONS FOR INDEPENDENCE

### Infographic design

Design



### Project details

- 🔗 [Organization website](#)
- 🏥 Health
- 🕒 Approx. 6 weeks (30 hours)
- 📍 Santa Rosa, California
- 📧 Can be done remotely

### Target skills

- Graphic design
- 🏆 This organization has completed 1 project on Taproot+

### Project need

Create an infographic that we can share on our website as well as a print version for VIP informational packets describing how Canine Companions names our puppies. It's a process with a few steps that is fun and informational and will hope to better explain it with graphics and photos that match our brand. Our process can be complicated with many aspects. We need to graphically describe what we do to create further engagement so people volunteer and donate. Increased awareness of how we help people with disabilities, and how it all starts with a puppy to change a life.

### Organization's mission

Canine Companions for Independence breeds, trains and trains assistance dogs for children, adults and veterans with disabilities to assist with every

[www.taprootplus.org](http://www.taprootplus.org)

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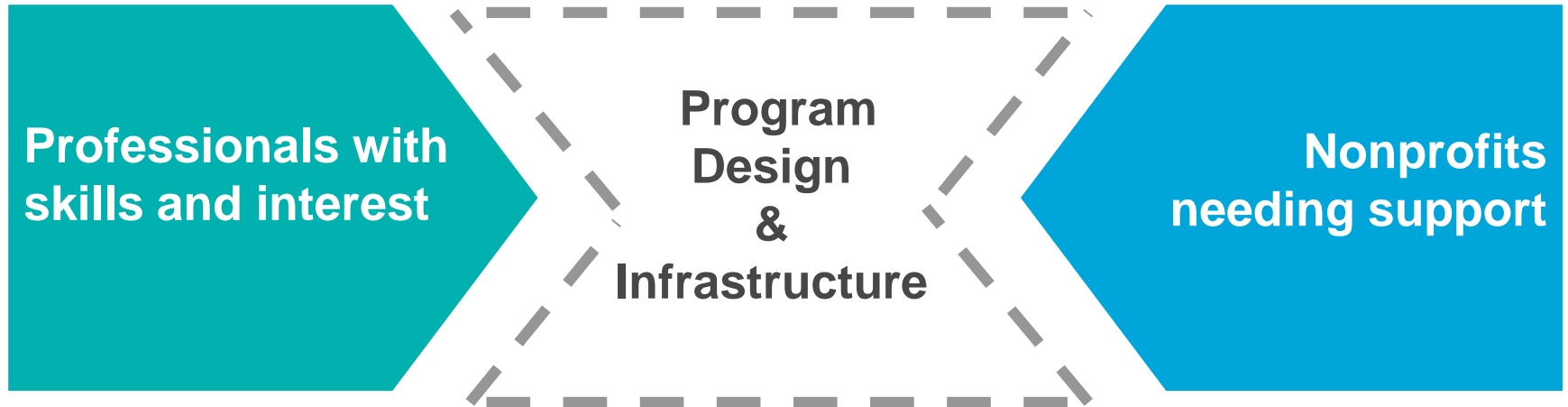
**Best Practices**

**Q&A**

What could this look like for you?



# DESIGN CHECKLIST



- ☐ What kind of **impact** do I want to have? On what **organizations**?
- ☐ What types of **employee expertise** can I tap?
- ☐ How **many employees** do I want to engage? For **how long**?
- ☐ How much **bandwidth** do I have to run a program? How can it be **sustained and scaled**?

# UNDERSTAND YOUR OWN SPECTRUM

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Taproot Foundation, 2008.

# MORE BEST PRACTICES

Visit the “RESOURCES” page in the [“DO PRO BONO” → “CORPORATIONS”](#) section of Taproot’s website to view and download **POWERING PRO BONO**

- ▶ Step-by-step guide for developing a pro bono program
- ▶ “8 Models of Pro Bono Service” case studies
- ▶ Dollar valuation tools and business case key messages

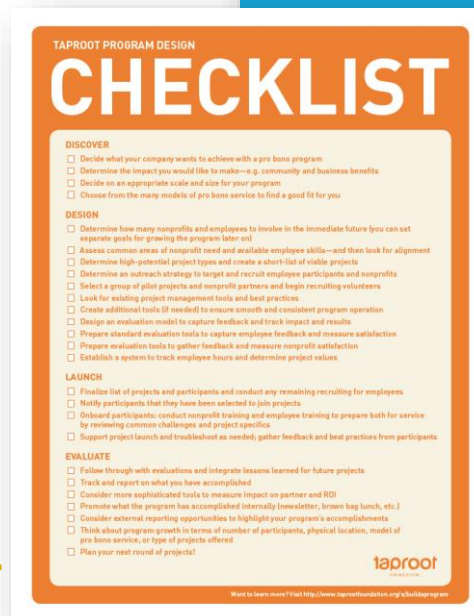
[www.taprootfoundation.org](http://www.taprootfoundation.org)

[advisory@taprootfoundation.org](mailto:advisory@taprootfoundation.org)

## POWERING PRO BONO

The comprehensive resource for companies engaging their employees in pro bono service.

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# MAKE IT MATTER

NOT FOR REDISTRIBUTION

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