

## Leading Best Practices in Pro Bono Service Conference Call Series Takeaways

### INTERNAL STAFFING STRATEGIES June 30, 2008

#### Staffing of pro bono programs:

Staffing structures for pro bono programs are anything but uniform between, or within, fields of service – accounting, architecture, communications, legal or management services. However, a clear trend is that most programs are moving towards dedicated staff to vet, source, monitor, evaluate and track pro bono engagements.

- Law firms seem to have progressed furthest along the spectrum of formality, some having fully-dedicated Pro Bono Counsels. The most advanced programs have paid staff members dedicated either solely or in part to administering pro bono programs. Generally, that staffing structure includes a pro bono coordinator or manager, often included in the Community Relations or Professional Development departments, supported by local or national Pro Bono Committees drawn from leaders and volunteers across the business.
- Firms in other fields are still developing formal structures as most currently rely on largely informal volunteer networks. Some firms do have Pro Bono Coordinators or other paid, dedicated staff supporting pro bono programs.
- While pro bono engagements of law firms are often selected and managed by an individual lawyer and sponsored by partners, pro bono projects in other fields are likely to require greater centralized support for sourcing pro bono projects and vetting the opportunities, working with partners/managers to identify the appropriate engagement staff, as well as to monitor and evaluate the quality of the engagements.

#### Staffing for tracking pro bono programs:

Tracking pro bono work accurately and effectively is still a challenge for most programs. Most tracking falls to the partners, employees, and volunteers on the project, though some firms have dedicated staff for it. Most of the participating firms are searching for ways to evaluate social impact beyond hours committed. Examples of tracking systems include:

- At one accounting firm, pro bono work is tracked by partners and the employees on a project. Community and regional pro bono coordinators follow up to make sure the project is complete, but the consultants on the project use their business skills to do the evaluation. This system often undercounts engagement because the definition excludes lots of “on the side” pro bono and volunteer work.
- At one law firm, though the projects are tracked in many different ways, only hours are reported to firm management.

#### Attendees

Susanna Baker  
Perkins & Will

John Beale  
Weber Shandwick

Michael Fields  
Booz Allen Hamilton

Ronald Flagg  
Sidley Austin Brown  
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Andee Gerhardt  
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Tara Greco  
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Deloitte

Jeremy Silverman  
McKenna Long &  
Aldridge

Amanda Smith  
Morgan Lewis & Bockius

Laura Zimmer  
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## Budgeting for pro bono programs:

Budgeting for pro bono services, both for where the money comes from and where it goes, varies between fields because of the differences in the types of service provided. For example, the costs of creating a strategic plan are more easily forecasted than the costs of providing legal representation for a nonprofit in a trademark dispute. Thus, it seems that legal firms have looser structures for pro bono budgeting than other firms because the projects are more variable, as well as driven and staffed on a more individual basis. Examples of budgeting procedures across fields include:

- One strategy firm provides an annual pro bono budget derived from the centralized Community Relations budget. Projects are evaluated on a case by case basis, looking at the nonprofit's financial stability, services delivered, and percentage of budget consumed by overhead, and then discussed with the nonprofit to determine actual needs and budget forecast. This firm evaluates the cost of pro bono work as the salary, plus fringe, for employees involved, not at billable rate.
- One architecture firm allocates between 0.5-1% of total operating costs to pro bono work.
- One law firm allows individual lawyers to choose and complete their own projects as long as the cases do not require excessive amounts of travel, research, and man hours, while another legal firm has a separate budget for pro bono work that comes from the firm's recruiting budget.
- One accounting firm has four businesses, each with its own P&L. The CEO budgets for pro bono work and the operating partners receive revenue credit for that amount which is taken as an expense out of the CEO's budget within each business line. The most important perspective change was creating a mechanism for pro bono value "that really looked, and was treated like, revenue for our partners."

## About Professional Services Firms' Pro Bono Programs

Even pro bono programs that have existed for "a long time" are still evolving. Across fields, programs range from highly centralized with formal infrastructures, to informal volunteer networks with no dedicated support staff. Most programs fall somewhere in the middle. There is no single right answer for how to staff, manage, budget, or track pro bono engagements, though the most effective systems seem to evolve organically, incorporate pro bono into standard business practices, and capitalize on the unique strengths and structures of the firms in which they are built.

This series of best practices conference calls were established to understand some of the trends and practices currently taken across firms from a variety of professional services fields for managing pro bono services. This first call focused on effective staffing models for supporting a world class pro bono service program.

### MARK YOUR CALENDARS AND RESERVE A SPACE FOR THESE UPCOMING CALLS:

**8/20 - Measurement:** What are the best metrics to use for measuring pro bono services?

**10/22 - Professional Development:** How are pro bono services integrated into employee development programs?

**12/17 - Integration with Philanthropy:** How do pro bono services integrate into a firm's philanthropic efforts?

**2/25 - Tracking and Reporting:** What tools are used for tracking and measuring pro bono efforts?

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