PBAT Pro Bono Action Tank

Taproot FOUNDATION

Leading Practices in Pro Bono Service Conference Call Series Takeaways

MEASUREMENT OF PRO BONO PROGRAMS

August 20, 2008

Summary – State of Measurement

Professional services firms invest in pro bono service programs to make an impact in their communities and to help create business value for the firm. To support their investment in pro bono work and to ensure the sustainability of their programs, they increasingly seek the ability to quantify their impact and the business value.

The degree to which these firms measure impact is mixed and is driven by a number of variables including the number of pro bono clients, systems that are in place already as part of their business practices and the age of the program.

Continuum of Measurement

Activity → Outcomes → Satisfaction → Impact → *Community Impact**

** Added based on the discussion*

CLIENT IMPACT

	Activity	Outcomes	Satisfaction	Impact	Community Impact*
For example:	*How many consulting hours were used?*	*What was the deliverable?*	*Were clients satisfied with the work you delivered?*	*What impact did the project have for the client?*	*Does the client's programs improve the community?*
Current State:	• Most firms attempt to track this information but it may not be centralized and may only include formal engagements, not ad hoc.	• This is tracked by most firms but there is not always a complete record for all projects and may not be easily accessed.	• Client and employee satisfaction data is collected by less than 50% of the firms.	• This is only tracked by firms with a small number of pro bono clients. • It is typically not tracked by law firms given the nature of their engagements.	• None of the firms reported an ability to track the impact of their work on the community at large. • There was much debate on whether or not this is a quantifiable goal.

BUSINESS VALUE

	Activity	Outcomes	Satisfaction	Impact	Community Impact*
For example:	*How many employees were engaged?*	*Applicants are aware the firm engages in pro bono projects?*	*Do employees like the program?*	*Applicants accepted offer due to pro bono engagements?*	*Is the company a more socially responsible corporation?*
Current State:	• Same as Client Impact Current State listed above.	• This is rarely tracked.	• Many firms lump the measurement of this in with their overall CSR related efforts.	• This is only anecdotal.	• This is not happening currently.

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Key Takeaways

• While firms desire to systematically measure the impact of pro bono service on their business and society, it remains inspirational and anecdotal.

• Most firms have developed systems to track activities and outcomes and some have implemented satisfaction measures. Some firms agreed the appropriate project metrics should be defined as part of the project scoping activities. All firms agreed it would be beneficial to include a client and volunteer satisfaction survey following the completed project.

• Law firms have unique challenges given their direct service work, the nature of outcomes for legal engagements and the pure volume of clients.

• The majority of firms have systems in place to track the impact of paid consulting work that could be leveraged to support pro bono service measurement. New systems are not required.

• Similarly, in many cases the business benefits could be tracked using the existing measurement tools used to track employee outcomes (recruitment, engagement and retention) and client outcomes (new business development and client renewals) in addition to the soft values associated with pro bono work. Questions specific to pro bono service should be added to the existing measurement tools.

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 industries for managing pro bono services. The first call focused on effective staffing models for supporting a world class pro bono service program.

These efforts are guided and sponsored by the PBAT Leadership Group:

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MARK YOUR CALENDARS AND RESERVE A SPACE FOR THESE UPCOMING CALLS

10/22, 1PT - Professional Development: How are pro bono services integrated into employee development programs?

12/17, 1PT - Integration with Philanthropy: How do pro bono services integrate into a firm's philanthropic efforts?

2/25, 1PT - Tracking and Reporting: What tools are used for tracking and measuring pro bono efforts?

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