UNDERSTANDING YOUR PRO BONO PROJECT NEEDS

There are two primary ways to go about identifying specific pro bono project needs. In this resource we’ll cover the more fundamental of the two approaches—using your to-do list to identify potential projects. With this approach, you can identify specific things you think your organization needs and then confirm that the projects fit your high-level strategy.

For example, you know intuitively that you need a new website. Every organization needs a website! But why? Looking back at your strategic plan can confirm and clarify this 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. A to-do list based needs assessment helps you to move quickly from needs to potential projects.

The advanced approach, called strategy-based needs assessment, uses an organization’s strategic plan or other guiding document to generate project ideas. You first identify a goal, then ask yourself, “How am I going to accomplish this goal? And is there any resource or task that is a potential match for pro bono?” For example, you might identify a need to provide more information to the public to educate them on an issue, and then determine that a better training for your front-line staff is the best way to implement that strategy.

While the strategy-based approach has potential for higher-impact, more holistic results, it also makes it much more difficult to get to a specific project list. The effort is worth it when you are more experienced with pro bono and want to better integrate pro bono work into your overall strategy for using resources—as you scale your pro bono use and become Powered by Pro Bono. To learn more about strategy-based assessment, check out the “Scale” section in Taproot Foundation’s Powered by Pro Bono, available through Jossey-Bass.
Instructions: Using the diagram below, begin by describing the specific tactic, project, or action that the 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, multi-year goals?”

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 multi-year, strategic priorities?

   - List the multi-year strategic priority addressed through this project

It is important to remember that there may be multiple tasks or actions that accomplish each departmental goal, organizational goal, and strategic priority. If your organization doesn’t have a strategic plan, answer as many of the “Why” questions as you can. The key is to trace the action/activity back to the reason why it is important to the organization.
Interested in seeing how this exercise might look in real life? Here are some sample projects that each trace back to a different multi-year priority.

<table>
<thead>
<tr>
<th>1</th>
<th><strong>WHAT</strong> is the specific task, process or deliverable you are hoping to produce?</th>
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<tbody>
<tr>
<td>2</td>
<td><strong>WHY</strong> is this important to meet your departmental or functional area goals?</td>
</tr>
<tr>
<td>3</td>
<td><strong>WHY</strong> is this important to meet your annual organizational goals?</td>
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<tr>
<td>4</td>
<td><strong>WHY</strong> is this important to meet your multi-year, strategic priorities?</td>
</tr>
</tbody>
</table>

**Example 1 – Update Volunteer Management Database**
We need to modify the database to track volunteer hours and attendance *(because)*

We wish to implement a new recognition system for volunteers based on tenure of service *(because)*

This year our goals include improving the retention and extend the average length of volunteer service *(because)*

Our strategic plan states that we must increase the role of volunteers in our organization

**Example 2 – Geographic Expansion Plan**
We need to create an expansion plan to support our transition to an new metro market *(because)*

We wish to understand the feasibility, costs, and expectations of entering the new market *(because)*

This year our goals include supporting the planning for the opening of an office in one new metro area *(because)*

Our strategic plan states that we will expand to two new cities in the next 3 years.
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 also help generate a list of viable project opportunities. Reference the table below for common challenges and correlating pro bono solutions.

| “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  
• One-Pager  
• “Competitive” analysis |
| “We need to raise visibility of our services in the community.” | • PR Plan  
• Search engine optimization  
• PSA 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 to 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

Now that you’ve considered several approaches to drafting your potential project ideas, list them in the table below in general order of priority.

PROJECTS OF INTEREST

1

2

3

4

5

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

Ready to continue with this process? Check out “SCREENING WITH FOUR TESTS FOR GREAT PRO BONO ENGAGEMENTS” in the Taproot Foundation’s Powered by Pro Bono (Jossey-Bass, 2012).