About the Competencies Map

The Competencies Map, a signature project of the Pro Bono Action Tank, was created with one clear goal: to provide a catalog of information mapping nonprofit needs to the professional expertise that potentially could be provided through pro bono service.

The Competencies Map is meant to:

- Support corporations, universities, professional services firms and trade associations in understanding which of their employees’, members’ and students’ competencies align with common needs in the nonprofit sector.
- Provide nonprofit organizations with information about the range of assistance that might be accessible through pro bono service, and understand the volunteer expertise needed for each project.
- Allow individual business professionals to identify the types of projects needed by nonprofits which might be a good match for their own expertise.
- Provide all participants with a viability rating for each pro bono service project type that describes the nonprofit demand for the project and the specific key risks associated with it.

Ongoing Updates
We will be updating the Competencies Map on an ongoing basis to reflect new lessons from the field and better meet the needs of its users. If you have a suggestion for how it could be modified or expanded to better meet your needs, please contact the Pro Bono Action Tank at pbat@taprootfoundation.org. If you would like to showcase your own example of providing or receiving a pro bono project, please let us know.

How to Navigate
The Competencies Map was designed based on input from key stakeholders regarding what information they needed to better understand common nonprofit needs and what professional expertise might be available to deliver each project type. Find the user example that best applies to you to help you navigate through the Map.

Example Use for Corporations
Scenario: As a corporate community engagement manager, you have received a request from a nonprofit partner for pro bono branding support.

Navigation:

1. Use the **Select by Project** function to identify the relevant project category (in this case Marketing/Branding).

2. For the selected category, scroll through the projects to find the one that best matches the need of your nonprofit partner.

3. You’ll see three helpful pieces of information appear under the selected project type: the viability rating, the risks associated with that project type, and the occupations that often can deliver that type of project.

4. Consider the pro bono viability rating and associated risks for that project before deciding to undertake it. For a successful project you need to ensure that your potential pro bono client and your employees are well aware of the common risks, and ensure that the project scope and engagement management mitigates them appropriately. (Refer to the Map Legend for more information about each of the potential risks.)
5. Note the occupations used to deliver this type of project and consider the employees in your company who can offer the expertise needed.

With this information you now have a sense of whether your community partner’s need is one that your employee base can address through pro bono service, and whether the risks associated with that project are prohibitive or can be mitigated through some thoughtful planning.

And remember, the key tenet for effective pro bono service is treating the pro bono client like any paying client. That means establishing a clearly defined scope of work that provides the timeline, deliverables, clear roles and responsibilities and desired outcomes for the team of pro bono providers, the pro bono client and your company as a whole at the outset of the project.

For more information about delivering high-quality pro bono service, visit the Resources section of [www.probonoactiontank.org](http://www.probonoactiontank.org). For examples of corporations delivering pro bono services for specific projects, please visit the Case Studies section of the website.

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**Example Use for Nonprofits**

Scenario: As an Executive Director of a nonprofit, you have a pressing need to improve your staff training but don’t have the funding to hire someone to do it internally. You want to see if this is the type of need that could be addressed through pro bono service and what kind of assistance you’d need to ask for to make it possible.

**Navigation:**

1. Use the Select by Project search function to identify the relevant project category (in this case Human Resources).

2. For the selected category, scroll through the relevant projects to find one that accurately reflects your need. You can click on different project types to see a description of what each project delivers to help select the right one for you.

3. When you select a specific project type, you’ll see three helpful pieces of information appear: the viability rating, the risk levels associated with that project type, and the occupations that can commonly deliver that type of project.

4. Consider the respective pro bono viability rating and associated risks for that project before deciding to pursue it. You’ll need to ensure your organization and the pro bono service providers are well aware of the common risks of that project, and ensure that the project scope and engagement management mitigates them appropriately. *(Refer to the Map Legend for more information about each of the potential risks.)*

5. If you find a project that fits your needs, note the common occupations used to deliver these types of projects. This information can help you consider the companies or intermediaries located relatively close by that might be able to make available to you those occupations identified. You also should consider Board Members and corporate partners whom you have an existing relationship. Be prepared to clearly explain your organization’s need and your expectations for the project. Keep in mind there are often culture and jargon barriers that can make an initial conversation more challenging to navigate.

(continued)
You may want to send the Competencies Map description of your preferred project to your contact to help kick off the conversation.

And remember, a key first step in setting up a pro bono project is establishing a clearly defined scope of work that provides the timeline, deliverables, clear roles and responsibilities and desired outcomes for both the pro bono team and your organization from the very beginning of the project.

For more information about best practices of high-quality pro bono service, visit www.taprootfoundation.org.

Example Use for Business Professionals
Scenario: As a business professional on the Board of a nonprofit, want to let the organization know what kinds of pro bono projects you and the expertise of your colleagues could provide.

**Navigation:**

1. Use the Select by Occupation function to identify the occupation that best matches your professional background and expertise.

2. For that occupation, look at the list of related pro bono projects that appears.

3. Click on each of the projects in the list to understand the project’s demand and viability in order to determine which you are equipped to deliver successfully that meet existing needs of the organization.

4. For each project that you identify be sure you also consider the additional occupations that might be needed to deliver the project successfully.

You now can use these project descriptions as a starting point for a discussion with the nonprofit to evaluate if you can help meet a pressing need. It is important also to consider the time commitment that would be necessary by you and the nonprofit for a project to be delivered successfully, as well as any technical knowledge or resources required to sustain the project once it is completed.

And remember, a key first step in setting up a pro bono project is establishing a clearly defined scope of work that provides the timeline, deliverables, clear roles and responsibilities and desired outcomes for both the pro bono team and your organization from the very beginning of the project.

For more information about best practices of high-quality pro bono service, visit the Resources section of www.probonoactiontank.org.
Cartography Process: How the Map was Created

Developing the Competencies Map took place in four stages. Each phase was designed to ensure a robust and accurate set of data that would enable nonprofits, companies, universities, trade associations and business professionals to engage in high-quality pro bono projects.

**Phase One: Identifying pro bono projects**
The websites of leading professional services firms serving nonprofits and corporations were audited to identify the most common types of capacity building projects available in the marketplace. Those that were likely to be of interest to nonprofit organizations with budgets under $15 million resulted in our list of 76 potential pro bono projects.

**Phase Two: Determining demand**
We surveyed more than 400 nonprofit Executive Directors across the country to gauge the demand for each project identified in Phase One. Demand was defined by which projects the nonprofits already planned to undertake in the next two years and qualified by which they intended to conduct with internal resources versus outsourced – either pro bono or paid.

**Phase Three: Assessing viability and risk**
Nonprofit management and consulting experts from a range of fields were interviewed to understand the viability of these projects in a pro bono manner and to assess the risk of the projects associated with the known areas of challenges common to pro bono service - time sensitivity, scope creep and sector knowledge. (See page 4 for more detail on risk definitions)

**Phase Four: Matching projects and occupations**
The team identified occupations in the Bureau of Labor Statistics (BLS) survey to match common occupations with relevant project types. The BLS survey was also used to provide descriptions of the occupations and the number of those professionals filling those roles reported in the United States.

The Cartographers
This effort was led by the Pro Bono Action Tank team in collaboration with our partners San Francisco School Volunteers and Business Volunteers Unlimited.

The following professionals provided their expertise on the project assessments and descriptions:

- Greg Baldwin, VolunteerMatch
- Brian Broadbent, Business Volunteers Unlimited
- Anne Marie Burgoyne, Draper Richards Foundation
- John Cary, Public Architecture
- Cynthia Gibson
- Heidi Gibson
- Rick Hobish, Pro Bono Partnership
- John Peterson, Public Architecture
- Trooper Sanders, Clinton Foundation
- Karen Schellhorn
- Bobbi Silten, Gap Inc. Foundation
- Marguerite Wilbur

In addition, Target also played a key role through their donation of a $500 gift card that was awarded to a randomly selected for a nonprofit survey respondent.

**We gratefully acknowledge these leaders for their leadership and continued partnership in fostering the pro bono movement.**
Map Legend

All good maps have a legend to help you find your destination. The following terms are used throughout the map - here is what they mean and how to use them.

**Category**
This is an area of professional services (legal or advertising services, for example) in which there are one or more common nonprofit project needs. The categories will help you navigate the 76 different types of projects more easily.

**Project Types**
There are 76 common projects needed by nonprofit organizations included in the Competencies Map. Each project includes a description that helps explain what a typical project would include and the goals for that project. The descriptions are intended to provide a general definition; the scope and approach will vary by nonprofit based on their specific needs, and by the pro bono team delivering their expertise. These project types should be used as a starting place for planning and not as hard guidelines.

**Nonprofit Project Demand – What projects do nonprofits need the most?**
Naturally, certain projects are in greater demand by the nonprofit sector depending on relevant economic conditions and trends in the sector. The Demand rating provided in this Map provides a general sense of the relative demand based on our nonprofit survey. This rating should help organizations focus their efforts on delivering projects that are truly needed by the nonprofit. Projects with a medium demand rating should not be overlooked as it depends on the specific nonprofit partner’s needs; a donor segmentation project, for example, would be in high demand at a newer organization beginning to track donors but less effectual for a larger, well funded nonprofit.

**Pro Bono Project Viability – How “reasonable” is it to take on this project?**
Each project has been assigned a relative pro bono Viability rating. These ratings take into account the three most common reasons for suboptimal outcomes in pro bono service projects: time sensitivity, project scope creep and required sector knowledge (see risk descriptions on the next page). These ratings should be used to determine the likely success of a project and to inform a proper project scope to minimize the potential risk(s). A medium viability rating requires a close look at the associated risks. An event planning project, for example, does not require sector knowledge and is not likely to grow in project scope but is extremely time sensitive.

*High viability does not mean this is not a viable pro bono project; it indicates that the risks should be very carefully considered when scoping the work for that project. Depending on the associated risks, that project may require a high level of sector knowledge; it; and/or very reliable, quick turnaround time; and/or it may tend towards a higher probability of project scope creep. These are all attributes that tend to make projects riskier when delivered on a pro bono basis.*
Relative Pro Bono Risks
Each project has been assessed for potential risk in the following three categories.

<table>
<thead>
<tr>
<th>Scope Creep</th>
<th>Time Sensitivity</th>
<th>Sector Knowledge</th>
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| One of the greatest challenges in any project (paid or pro bono) is the potential for the project to shift in goals and expansion in the scope of work. In paid engagements, this is addressed by charging the client for any extra time required (and original scope of work is typically well defined because of this financial risk of not doing so). In pro bono service projects there is less incentive to accurately nail down the project scope and once it is defined, there is a tendency for it to change. This is well intentioned but often leads to resentment by both parties and for projects to never reach completion. Certain projects tend to suffer from this problem more than others. A web site project can have such a wide range of options as to lead to significant project scope creep. On the other hand, the filing for legal incorporation is petty well defined and is not likely to grow in scope. | Some projects are tied to specific concrete deadlines. Given the nature of pro bono service, delivering on a specific and tight deadline can be challenging. Pro bono service is best used for projects where a potential slip of 25-50% on the timeline will not put the nonprofit client in jeopardy. For example, event planning and financial audits tend to be riskier than creating a Board reporting dashboard.  

*Please note: time sensitivity does not indicate the amount of time required by the pro bono team. Each project should be scoped as appropriate to the need of the nonprofit and the ability of the pro bono team to address that need.* | For many business professionals engaged in pro bono service, it is their first time working in the nonprofit sector. Certain projects are almost identical to the corporate counterparts (i.e. designing a logo or conducting a lease review.) Others, such as nonprofit financial audits and program evaluation, use standard business skills but require significant sector knowledge. In general, projects that require advanced sector knowledge should be avoided or the client will need to invest significant time in providing the knowledge transfer to the pro bono team. |

The high potential for any of these risks does not indicate one should not engage in this project in a pro bono manner, it simply means prepare adequately to mitigate the potential risk. Also, please note this does not cover all potential risks associated with pro bono engagements; these are the most common ones to address in every engagement.

**Symbols indicating the project has potentially:**
- Minimal Risk
- Medium Risk
- Significant Risk

**Fields**
Based on the Bureau of Labor Statistics (BLS) taxonomy, occupations were grouped into fields to make them easier to categorize. The occupations in one department at a specific company may be used across multiple fields in the BLS taxonomy. Therefore, these fields should be used as a starting place for planning and not as hard guidelines. For more information on the BLS taxonomy, please visit their site at [http://www.bls.gov](http://www.bls.gov).

**Occupations**
Occupations listed in the BLS taxonomy were selected based on common roles used in delivering the pro bono projects in the Competencies Map. The occupations selected were based on the most common title and description from the BLS taxonomy. These roles and titles will not be consistent for all organizations. That is why we have provided the BLS description for that occupation.

Not all professions represented will be of equal fit for all projects. For an occupation to be associated with a profession it was determined that at least 50% of the professionals that would associate with the occupation would be a good fit. This was a subjective assessment by field experts.