Pro Bono Toolkit

Corporate Partner

Welcome

A pro bono toolkit for the corporate sector

The purpose of this toolkit is to provide a simple to use resource that can enhance the effectiveness of pro bono engagements between organisations that work together in our communities.

Through a process of stepping up, setting up and following up, there are a few simple steps pro bono engagements can implement to create alignment between all stakeholders. This in turn will maximise the impact of your investment of time and expertise. Your community partner will have their own toolkit to complete.

The Pro Bono Toolkit puts people at the centre of the process and makes it easy to set, work towards and measure the outcomes of pro bono engagements.

Pro bono

A pro bono engagement involves the sharing of skills and expertise at no cost to the recipient. Pro bono engagements between community and corporate sectors provide unique opportunities to strengthen the capabilities of community organisations and deliver professional and personal development to corporate employees.

When should the Pro Bono Toolkit be used?

The Pro Bono Toolkit should be used when a community organisation has connected with a corporate employee or team to work on an engagement in a pro bono capacity. The toolkit will assist in:

- determining the suitability of the engagement for all stakeholders
- ensuring policies and procedures are adhered to and implemented
- identifying goals and outcomes to be achieved
- sharing stakeholder perspectives
- synchronising expectations
- documenting the engagement in a 'plan-on-a-page'
- allocating responsibilities
- ensuring the engagement stays on track
- asessing outcomes, acknowledging learnings and celebrating success.

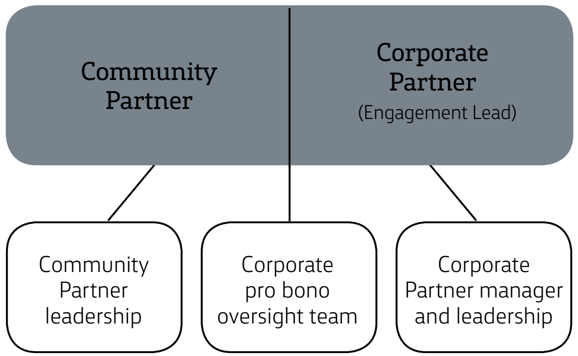
The stakeholders

The key stakeholders in a pro bono engagement are:

- The corporate employee or team providing their skills and expertise pro bono (Corporate Partner)
- The representative of the community organisation receiving the pro bono assistance (Community Partner).

Other stakeholders to be informed at relevant stages of the engagement:

- Corporate Partner's direct manager (and other leadership where required)
- Leadership (including Board) of the Community Partner
- Individual or team within the corporate who is responsible for the oversight of pro bono engagements (e.g. Workplace Giving, Corporate Social Responsibility or Volunteering team).



Process

The Journey

There are three phases of work to complete when undertaking a pro bono engagement. This toolkit is designed as a simple to use resource that walks you through the process – providing everything you need along the way at exactly the time you need it.

The three phases are:

1. Step-up

Stakeholders step-up and assume responsibility for their role in the pro bono engagement process. It is important that all stakeholders reflect on and define their desired outcomes at the outset.

- Self-reflection
- Accountability

2. Set-up

In this phase, stakeholders collaborate and set-up an engagement plan that meets their defined objectives. Outcomes are discussed and a proposed plan for the pro bono engagement is created as a plan-on-a-page. Once all parties are happy, it is formally agreed and committed to.

- Kick-off conversation
- Induction
- Agreement & commitment

3. Follow-up

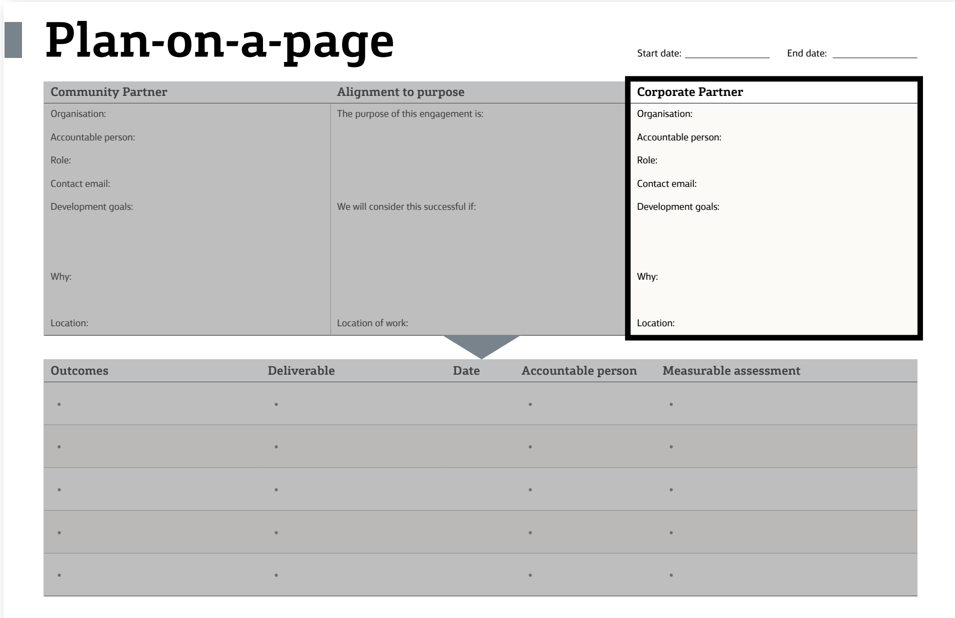
Regular check-ins throughout the engagement help to keep things on track. Following-up post-engagement ensures outcomes are acknowledged, reporting is completed, and there is an opportunity for everyone to celebrate a successful engagement.

- Checking in
- Acknowledgment and reporting
- Celebration

The Destination

The centrepiece of this toolkit is the 'plan-on-a-page' (refer to appendix for a completed sample plan-on-a-page and the plan-on-a-page template). It is important to complete the plan before you are on the ground undertaking your pro bono engagement with your Community Partner. The completed plan will provide alignment and shared understanding for all stakeholders.

As the Corporate Partner, you will begin working with the plan-on-a-page in the top right hand corner. Later you will work with your Community Partner to complete the rest of the plan.



Plan-on-a-page

Start date: ______ End date: ______

Community Partner	Alignment to purpose	Corporate Partner
Organisation: Accountable person: Role: Contact email: Development goals: Why: Location:	The purpose of this engagement is: We will consider this successful if: Location of work:	Organisation: Accountable person: Role: Contact email: Development goals: Why: Location:

Outcomes	Deliverable	Date	Accountable person	Measurable assessment
•	•		•	•
•	•		•	•
•	•		•	•
•	•		•	•
•	•		•	•

Note:
Clicking on each heading in the navigation pane to the right will take you directly to each section of this document.

1. Step-up

Let's get started

Refer to the checklist on page 6 of this guide.

Self-reflection

Use the reflection questions and the self-reflection matrix in the appendix to help you arrive at a set of clearly defined professional development goals relevant to this pro bono engagement. You may also have personal development goals that can be achieved as a result of the experience.

Your manager, team colleagues or members of your organisational development team may have ideas to help you as well as being a good sounding board.

Communication

At the outset of your pro bono engagement it is important to establish and maintain regular communication with your own manager. It is especially important to communicate key dates. This communication ensures business as usual is not jeopardised and key stakeholder relationships are managed throughout the engagement.

Refer to the appendix for a recommended communication timeline.

Accountability

In situations where multiple and diverse stakeholders have little or no previous experience working together, it can be hard to attribute who is responsible for driving the success of engagements. This is the problem of many hands. For this reason it is important to establish accountability early on.

- To avoid confusion, as the Corporate Partner you are engagement leader, accountable for driving the pro bono engagement. If a team is involved, appoint one person to this role.
- You are accountable for understanding and operating the engagement in line with your organisation's values.
- Ensure you have read and are familiar with relevant policy documents.
- As engagement leader you are responsible for arranging all meetings with your Community Partner.
- It is your responsibility to ensure meetings and the pro bono engagement are scheduled in consultation with your own manager.
- You are accountable for ensuring the pro bono engagement aligns to your organisation's community focus areas.
- Your Community Partner will have their own version of this toolkit where the key stakeholder within their organisation is encouraged to take ownership of managing this engagement internally on their end.

Your organisational values and purpose

It will be useful to link the engagement back to the values and purpose of your organisation. If you are unfamiliar with the specifics of any values or purpose statements now is a great time to look these up. As you proceed it will be important to consider how both the process and the objectives of this pro bono engagement align with the values and purpose of your organisation.

Your Community Partner will also be seeking values alignment and you may find significant common ground in this area.

Use the spaces below to record your organisational values and purpose:

Having clearly defined organisational development goals for pro bono engagements is an important factor in their success for corporate and community organisations. Think through your goals for this engagement carefully and discuss these with your manager.

2. Set-up

Kick-off conversation

The kick-off conversation is an important point where stakeholders connect for the first time before collaborating on a plan that meets a collective set of well-defined objectives.

It is your responsibility to arrange the kick-off conversation with your Community Partner. You will discuss your skills, hear more about the opportunity and ask any questions you may have.

You can use the sample agenda in the appendix to help you structure your kick-off conversation (20 min).

Induction

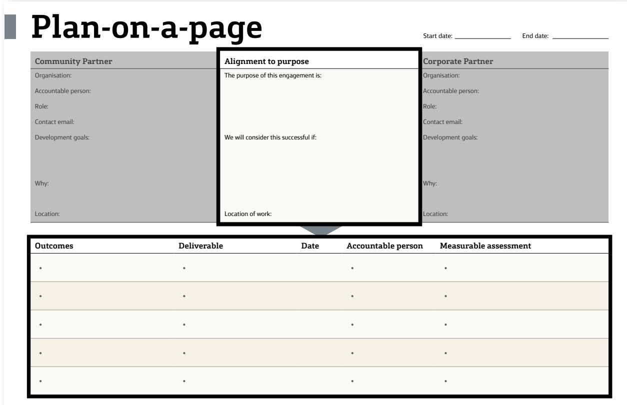
An on-site induction visit by the employee prior to commencing pro bono engagement is an important component of a successful engagement.

If an on-site induction is not possible, make use of video conferencing, virtual tours or any available video footage of the work environment. Seeing the environment in which you'll be providing support is paramount.

Your Community Partner is responsbile for the induction which may be arranged as per the sample agenda in the appendix.

Plan-on-a-page

Following the kick-off conversation and prior to induction, you and your Community Partner should individually complete your corner of the plan-on-a-page, utilising the outcomes of the reflection questions and self-reflection matrix. You and your Community Partner will finalise the plan-on-a-page at the induction (or during the virtual meeting if on-site induction is not possible), coming together to complete the alignment to purpose and outcomes and deliverables.



'Overview of the plan-on-a-page and the sections to be completed during induction'

You will be responsible for ensuring the completed plan-on-a-page is finalised and distributed to key stakeholders. There may be some changes to scope and plan until it is ready to be formally agreed.

Being open to some change is important. If any stakeholder feels like they're not getting what they thought they were supposed to, it can be a very dissatisfying situation. If, during the course of a engagement, a sense of 'things not being right' emerges, it can derail the success of the engagement. For this reason, it is important to make time after the induction to do the following:

- Take time to reflect on the proposed outcomes and plan
- Discuss any necessary revision of scope
- Share your plan-on-a-page with your manager for their reference
- Stay in the cycle of communication until agreement is reached.

Agreement & commitment

After the induction has taken place, and once the plan-on-a-page is finalised, both you and your Community Partner should be happy with how your plan will work. You're almost ready to commence the engagement.

But first, there are some important steps you need to take and paperwork that needs to be completed before your pro bono engagement can begin. The agreement step in this process is about ensuring the internal processes within stakeholder organisations are followed and are compliant.

Complete the following important tasks:

Important tasks

- [ ] Speak to any internal stakeholders who may need to approve your plan-on-a-page. Take the plan-on-a-page and discuss it, making amendments where required. Once complete, you'll need to ensure your Community Partner is still happy with any changes made.
- [ ] Complete a risk assessment with your Community Partner if required (see User Guide for further information).
- [ ] Arrange any paperwork that may be required to formalise the engagement (e.g. Pro Bono Engagement Deed, contract or MOU).

Once the above tasks have been completed, you are ready to begin the engagement.

Formal paperwork such as a risk assessment and/or Pro Bono Engagement Deed outline the parameters of the engagement and provide legal indemnities to both yourself and your Community Partner.

3. Follow-up

Check in

Regular meetings throughout the engagement, between all stakeholders, help to keep things on track.

Making check-ins clear and having structured conversations is critical for all parties because it can be common for people to lose track of tasks, engagement deadlines and key deliverables; all of which impact the value and success created by a pro bono engagement. The purpose of the check-in meeting is to have stakeholders meet and review their progress against the agreed plan-on-a-page.

It is your responsibilty to arrange regular check-ins (20 min) throughout the engagement. There is a sample agenda in the appendix that may be used.

Acknowledge & report

Post-engagement follow-up is about ensuring the engagement outcomes are acknowledged, reporting is completed and success is celebrated.

Without follow-up, stakeholders lose the ability to learn from mistakes, or to reinforce aspects that contribute to success. Another cost of not doing a proper follow-up is that some future engagements may not be set up for success as well as they could otherwise be.

Clearly understanding the performance of the engagement against the planned and agreed outcomes is important. Use the deliverables and outcomes from the plan-on-a-page as a guide along with the post-engagement evaluation agenda.

Celebrate

Celebrating the successes and key learnings identified in the post-engagement forum is an important step for both you and your Community Partner. This will help to ensure that future engagements continue to benefit from all that this engagement has achieved.

Examples of celabratory activities:

- Lunch and learn session
- Presentation at a team meeting
- Participating in a case study

Note:
Reflecting on engagements and being able to capture measurable impacts provides a formal and compelling conclusion to an engagement. It also enables broader reporting within your organisation and beyond.

Checklist

Use the checklist below to keep track of what you've done as you complete each step. The checklist demonstrates your adherence to the process and will be important for the finalisation of the Pro Bono Engagement Deed.

1. Step-up

- [ ] I have completed the reflection questions and self-reflection matrix, articulating the professional and personal development goals I would like to address through this engagement.
- [ ] I have discussed this engagement and my development goals with my manager.
- [ ] I have familiarised myself with the relevant policies and organisational requirements.

2. Set-up

- [ ] I have had a kick-off meeting with my Community Partner.
- [ ] I have completed the Corporate Partner section of the plan-on-a-page.
- [ ] Induction has been completed.
- [ ] Plan-on-a-page has been completed and terms have been agreed by all stakeholders.
- [ ] Any requisite formal documentation has been completed.

3. Follow-up

- [ ] I have had regular check-in meetings throughout the engagement.
- [ ] I have had a post engagement follow-up with my Community Partner to measure success and identify key learnings.
- [ ] I have celebrated the success of the engagement.
- [ ] I have reported my pro bono hours to my organisation's pro bono oversight team.

Thank you

Congratulations! Completing this engagement demonstrates your commitment to grow at a personal and professional level, while making a positive impact in the community. You should be proud of what you have achieved.

Appendix

Plan-on-a-page

Start date: ______________ End date: ______________

Community Partner	Alignment to purpose	Corporate Partner
Organisation:	The purpose of this engagement is:	Organisation:
Accountable person:		Accountable person:
Role:		Role:
Contact email:		Contact email:
Development goals:	We will consider this successful if:	Development goals:
Why:		Why:
Location:	Location of work:	Location:

Outcomes	Deliverable	Date	Accountable person	Measurable assessment

Plan-on-a-page sample

Start date: 06/11/17 End date: 01/12/17

Community Partner	Alignment to purpose	Corporate Partner
Organisation: The Assist Centre (TAC) **Accountable person:** Millie Smith **Role:** Senior Grants Manager **Contact email:** milliesmith@assist.org.au **Development goals:** 1. Improve use of Outlook and grant research process 2. Create standard operating procedure (SOP) 3. Event mgmt lead for Gala fundraiser **Why:** Need to improve and document team processes. Gala event - will raise the profile of and funds for The Assist Centre **Location:** The Assist Centre Head Office, Newtown	**The purpose of this engagement is:** To optimise the use of Outlook by The Assist Centre head office employees. Review and improve grant research process and create SOP for ongoing use. Plan and execute Gala fundraising event aimed at raising the profile of and funds for The Assist Centre. Provide Rebecca with experience working within the Deaf community, and a new environment within which to share, execute and grow her skills. **We will consider this successful if:** The Assist Centre head office staff demonstrate a more efficient use of Outlook, saving time and improving output. A clear and functional SOP is produced outlining an improved process for grant research. The Gala fundraising event meets or exceeds our target of $500k raised, and positive feedback about the event raises the profile of The Assist Centre. Rebecca and her CAN manager report that her project and event mgmt skills have been enhanced, as has her ability to work with and create solutions for new audiences. Rebecca gains personal growth and enjoyment from the experience working with and contributing to the Deaf community. **Location of work:** The Assist Centre & CAN offices	**Organisation:** Corporate Agency Network (CAN) **Accountable person:** Rebecca Brady **Role:** Executive Assistant **Contact email:** Rbrady@can.com.au **Development goals:** 1. Project/Event Management 2. Problem solving for a different audience 3. Experience working with the Deaf Community **Why:** Apply and grow my skills in a new and challenging environment. Contribute to the Deaf community, which is of personal interest to me. **Location:** CAN Head Office, Sydney

Outcomes	Deliverable	Date	Accountable person	Measurable assessment
• Review of existing Outlook use by TAC staff, and suggestions for optimisation	• Report outlining existing Outlook use and optimisation	08/11/17	• Rebecca Brady	• Report provided to Millie Smith either in writing or via verbal presentation
• Optimised use of Outlook by TAC staff	• Outlook training session for TAC staff	10/11/17	• Rebecca Brady	• TAC staff attend training session to learn how to optimise their use of Outlook, and implement their learnings
• Successful Gala event (raised profile of TAC and met/exceeded $ target)	• Mgmt of Gala - lead up and event	06/11/17 - 01/12/17	• Rebecca Brady	• Gala event meets or exceeds fundraising target of $500k. Solicited and unsolicited feedback from attendees of the event is positive.
• Professional and personal development for Rebecca Brady	• Opportunity to lead project and event. Induction and working experiences with Deaf community	06/11/17 - 01/12/17	• Millie Smith	• induction to TAC provided. Additional experience/s working with Deaf community through TAC provided. Rebecca provided with resources and acknowledged authority to lead Outlook optimisation project and Gala event.

Communication timeline

Use this template to help keep track of important check-ins. We've included the main meetings in this process, and a couple of rows for your own meetings.

Meetings and tasks	Due date/s	Time	Notes
Meeting with manager to gain approval and support			
Kick-off conversation with Community Partner			
Site visit and induction			
Risk assessment completed (where required) and formal documentation signed			
Check-in meetings with Community Partner throughout engagement			
Follow-up meeting and evaluation with Community Partner			

Reflection questions

Consider these questions to help you complete the self-reflection matrix.

Note:
Having clearly defined professional development goals is an important factor in the success of your pro bono engagement. Think through your goals carefully and discuss these with your manager.

Key questions	Probing questions	Notes
Why pro bono?	What is meaningful to me? Do I have a passion? What need can I serve?	Example: Connecting with the community in a meaningful way is very important for me, I am interested in finding a way to assist people with hearing problems.
Where have I been?	What past experience do I have that is relevant to this engagement?	Example: Having had 10 years experience in multiple organisations I have found that I am extremely well versed at adapting my skills in new environments. Colleagues and managers have commented about my ability to create new processes that have led to substantial efficiencies and increased productivity.
Where do I want to go?	What abilities do I want to develop?	Example: An area that I feel can add significant value to my current role and help me in my future career is project planning. While I have completed some internal training and supported other team members on internal projects I feel that by applying these skills in a new environment will be a huge benefit.
How will I know I've been successful?	How do I measure achievement of goals and evaluate success?	Example: I will know I have achieved success by meeting all commitment I have agreed to, experiencing a meaningful connection to community, and a measurable uplift in my project management skills..

Self-reflection matrix

Use your responses to the reflection questions on the previous page to help you complete the self-reflection matrix below.

Strengths	**Areas of development**
Example: - Process development to create efficient practices - Working in new environments	Example: - Refining my project mgmt skill in a practical setting - Developing skills in event management
Opportunities	**Challenges**
Example: - Utilsing skills in process development - Applying familiar skills in an environment connected to my passion area	Example: - Juggling competing priorities - Time management

Development goals

Using your notes from the reflection exercises and details from conversations you've had with your manager and other colleagues, complete a list of your highest priority professional and personal goals.

Professional development goals	**Personal development goals**
Example: - Develop engagement management skills - Hone coaching skills to guide and develop direct reports - Improve project management abilities	Example: - Become more proactive in communication - Develop better active listening skills - Gain greater understanding of community needs

Kick-off conversation agenda

Suggested time: 20 min

Use this template to help plan for, structure, and keep track of notes and action during your kick-off meeting.

Agenda items	Time	Owner	Actions and notes
1. Introductions Discuss role and motivations for involvement.	2 min		
2. Organisation and role Discuss the organisation and your role with the organisation	3 min		
3. Engagement outline *Include:* Aim of the engagement, access to resources, specific skills that are needed, any cultural sensitivities or working requirements (WWC) and location and timing of work.	10 min		
4. Agreement to proceed? *Yes:* Arrange site visit for induction or virtual tour of organisation and rundown of operations. *No:* Advise pro bono oversight team.	5 min		

Induction meeting agenda

Use this template to help plan for, structure, and keep track of notes and action during your induction meeting.

Suggested time: 1 hr
(in addition to site visit)

Agenda items	Time	Owner	Actions and notes
1. Site visit or virtual meeting Tour, formal induction and/or rundown of Community Partner operations.	~		
2. Engagement scope Share each partner's completed section of the plan-on-a-page and work through incorporating the goals into the engagement. Discuss timing, availability and access to resources.	25 min		
3. Plan-on-a-page Complete the 'alignment to purpose' and remaining sections of the plan-on-a-page.	30 min		
4. Agree on next steps	5 min		

Check-in agenda

Suggested time: 20 min

The purpose of the check-in meeting is to have stakeholders meet and review their progress against the agreed plan-on-a-page. Try the template below to check-in on deliverables, using the plan-on-a-page as a guide.

Engagement deliverables	On track?	Does anything require adjusting?	Actions
e.g. Outcome one			

Post-engagement evaluation agenda

Suggested time: 20 min

Use this template to plan for, structure and collect feedback and learnings from the follow-up meeting at the completion of the pro bono engagement. Use the plan on a page information to refer back to during this meeting

Engagement outcomes	Achieved?	Why? Why not?	What are your key learnings?
e.g. Outcome one			

User guide

1. What is a pro bono engagement?

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2. When should the Pro Bono Toolkit be used?

The Pro Bono Toolkit should be used when a corporate employee or team has connected with a community organisation to work on an engagement in a pro bono capacity. The toolkit will assist in:

- determining the suitability of the engagement for all stakeholders;
- ensuring policies and procedures are adhered to;
- identifying goals and outcomes to be achieved;
- sharing stakeholder perspectives;
- synchronising expectations;
- documenting the engagement in a 'plan-on-a-page';
- allocating responsibilities;
- ensuring the engagement stays on track;
- assessing outcomes, acknowledging learnings and celebrating success.

3. Should the Pro Bono Toolkit be used for all pro bono engagements?

Some pro bono engagements are short-term or one-off (e.g. one day) and may not require the full use of the toolkit. In these cases we recommend accessing the parts of the toolkit that are most relevant to the timeframe and requirements of the engagement (e.g. policies and procedures, plan-on-a-page, follow-up).

4. Who are the stakeholders in a pro bono engagement?

The key stakeholders in a pro bono engagement are the:

- Corporate employee or team providing their skills and expertise pro bono (Corporate Partner)
- Representative of the community organisation receiving the pro bono assistance (Community Partner).

Other stakeholders to be informed at relevant stages of the engagement:

- Corporate Partner's direct manager (and other leadership where required)
- Individual or team within the corporate who is responsible for the oversight of pro bono engagements (e.g. Workplace Giving, Corporate Social Responsibility, Volunteering teams).
- Leadership (including Board) of the Community Partner.

5. Why does the Corporate Partner lead the pro bono engagement?

It is advisable to have one stakeholder at the helm of the pro bono engagement, driving actions and accountability. The Community Partner may not have the time or resources needed, and leading a pro bono engagement is an excellent professional development opportunity for the Corporate Partner (e.g. project management, accountability, stakeholder management).

6. How does a does a team use the Pro Bono Toolkit?

The Corporate Partner leads the pro bono engagement. Where the Corporate Partner is a team it is essential to nominate a team leader who will lead the pro bono engagement and be the 'accountable person' which is reflected in the plan-on-a-page. Other roles should be assigned within the team to create clarity and accountability. Ensure the Community Partner and any other relevant stakeholders are informed of the team structure and accountabilities, and are kept up-to-date with any changes that may occur within the team. While there may be circumstances throughout the engagement where the team leader may act on behalf of the team, the entire team should participate in the following:

- Self-reflection
- Induction
- Acknowledging, reporting and celebrating.

7. When is a risk assessment required?

Many corporates require risk assessments to be undertaken for pro bono engagements where all or part of the work will be undertaken by their employee/s in a location external to their corporate offices. Consult with your pro bono oversight team on whether a risk assessment is required and the process for completing it.

User guide continued...

8. What is the function of the 'check-ins'?

Check-ins ensure that all stakeholders are kept up-to-date with the progress of the pro bono engagement. Check-ins are also a formal opportunity to discuss issues or concerns and recognise achievements. (Note: issues or concerns should be raised as soon as possible rather than waiting for a formal check-in).

9. How are actions from meetings assigned?

Assigning actions from a meeting is noting who is responsible for an outcome or deliverable, or who will take the next step to achieve a common goal. A useful method to follow is the 'RACI' model:

- **Responsible** - those who do the work to complete the task.
- **Accountable** – the one who is ultimately answerable for the thorough completion of the task.
- **Consulted** - those whose opinions are sought, typically subject matter experts.
- **Informed** - those who are kept up-to-date on progress, often only on completion of the task.

10. What is the process of escalation if difficulties arise during a pro bono engagement?

Any issues or concerns that arise during a pro bono engagement should be raised as soon as possible with your pro bono partner and any other relevant stakeholders. If the issue cannot be successfully resolved, contact your pro bono oversight team for assistance.

11. Can a pro bono engagement be terminated prior to the agreed end date?

If either the Corporate Partner or Community Partner are considering terminating a pro bono engagement, contact your pro bono oversight team immediately to discuss the process.

13. Can pro bono engagement stories be shared?

Where appropriate, pro bono engagement stories can be shared via internal and external communication channels, including social media. Pro bono engagements that have confidentiality requirements in place must be strictly adhered to and in all circumstances consult with your Community Partner before posting anything relating to the engagement in a public forum. Many organisations have internal policies outlining requirements for using social and other media.

The Pro Bono Toolkit was developed by the Commonwealth Bank and Karrikins Group in 2018. We are proud to present this toolkit to the Australian corporate and community sectors as a free resource to enhance the effectiveness of pro bono engagements. If you have any feedback to provide that will help us improve the Pro Bono Toolkit, please contact probonoservices@cba.com.au.

Please note that this Toolkit is a guide only. You should seek independent advice if you are entering into a pro bono engagement. The Toolkit does not represent any agreement or promise of a pro bono engagement from the Commonwealth Bank.