

A BEST PRACTICE GUIDE TO PRO BONO WORKING

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in collaboration with
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Introduction

Charities, social enterprises, communications agencies, and in-house teams can ALL benefit from the exchange of ‘organisational kindness.’ One way to do this is through pro bono working. This best practice guide considers the key principles of pro bono working, explores the benefits and challenges and is intended to stimulate a conversation in our industry. For the purposes of this article, pro bono partnerships refer to the ‘gifting’ of professional services (measured in hours spent) by a commercial organisation to a not-for-profit organisation.

“In order to survive and thrive, we must step into the Citizen Story. We must see ourselves as Citizens – people who actively shape the world around us, who cultivate meaningful connections to their community and institutions, who can imagine a different and better life, who care and take responsibility, and who create opportunities for others to do the same. Crucially, our institutions must also see people as Citizens, and treat us as such. When they do, everything changes.”

Citizens – Why The Key To Fixing Everything Is All of Us” by Jon Alexander¹

The Context

As the world feels increasingly chaotic and unsteady, there is recognition that the global issues we are facing require a consolidated effort from governments, from organisations (commercial and third sector) and from individuals.

Businesses are being increasingly scrutinised in relation to their societal impacts as well as their financial metrics and there is a significant increase in investment funds which favour businesses with robust Environmental, Social and Governance (ESG) frameworks².

The healthcare communications profession has a lot to give and diverse skills to share. The 2021 HCA benchmarking survey revealed that 35% of agencies did “some pro bono work” in 2020. It’s a good start but isn’t it time to ramp up the commitment, to share best practice and optimise the approach?

For commercial organisations, pro bono working delivers a “purpose-offset” where the work delivered through a pro bono partnership can accelerate the social or environmental impact of the not-for-profit organisation. Ultimately, the commitment to pro bono must be driven by a belief there is a duty to conduct business with a wider sense of responsibility. The rise in B Corp Certification³ is a promising indicator that things are moving in the right direction, but we are not all “there” yet.

Definitions

Pro bono working means providing professional services for free which result in benefit to the community that might otherwise not be available. Pro bono is short for the Latin phrase pro bono publico which means “for the public good.” This is different to volunteering which is a more general term meaning giving time and labour for community service. Pro bono working is also not the same as corporate partnerships which refer to agreements often between large companies and the not-for-profit sector to deliver a well-defined project by sharing both resourcing and funding.

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Benefits and Challenges - Agency and In-house Teams

Benefits

Recruitment and retention remain one of the most important challenges to the healthcare communications industry. Having a pro bono strategy will be both motivating and rewarding for your employees with significant benefits to your employer brand. A recent survey showed that when employees were asked to rank employer behaviours that were important to them, 33% said “a brand that contributes to broader society.”⁴

Recruitment and Retention

Having the edge on your competitors is invaluable in the hugely competitive fight for talent and sharing your approach and experience of pro bono working in your recruitment narrative is a powerful differentiator. Purposeful work is more important than eye-catching perks and according to The Caffeine Partnership, “employers should spend less time worrying about a never-ending list of benefits and enhancements and more time thinking about what drives motivation and engagement.”⁴

Employee Engagement

As we all know, staff retention in our industry is poor. According to the HCA, the mean staff turnover in 2021 was 27.1%.⁵ If you want to build a strong brand and a strong business, you need to motivate the people who are going to do that, your employees. For individuals, pro bono work is motivating, builds team-spirit and offers opportunities for learning and development. During the pandemic, many learned that collective acts of kindness gave them strength, whether it was to stand on the street clapping for the NHS or volunteering at the local vaccination centre. The opportunity to work as a team on a purposeful project enhances team-working and resilience.

“Many UK businesses have done their best during the pandemic to look after staff and provide them with a range of benefits, but as we look forward, we believe there is a need for employers to focus on those factors that drive real motivation. This will necessitate the creation of more purposeful employee context, one where leadership behaviours are congruent with a business’s stated purpose and values, where individuals and teams have a degree of autonomy over what they do and where they do it, as well as the opportunity to learn and develop and an overall sense that what they are doing is in the broadest sense meaningful.”

Purpose, Pay or Perks? What Matters Most to Employees⁴

Professional Development

While the quality of the work should never be compromised, individuals working on pro bono projects can learn new skills in an environment which feels less pressured. The nature of the work may also provide access to a new group of stakeholders or media contacts or give a new perspective on a communications challenge.

Profile Raising

Forming a “pop-up” team often liberates thinking, resulting in insightful and creative work. Sharing case studies of the work through marketing activities and entering awards can help both commercial organisations and the not-for-profit organisation raise their sector profile, helping with business development and funding respectively.

Challenges

It is often not the ‘pull-on-profit’ but the ‘pull-on-resource’ that may stand in the way of making a pro bono commitment. There is a perception that we just don’t have time!

Consider the following:

- What if pro bono work was re-framed as ‘time for learning and development?’ By ensuring that the right projects are matched with the right people, pro bono has huge value as an employee development opportunity
- Are you geared up to maximise unused capacity? While a great deal of effort is spent on managing resource, inevitably, there is down time when a project is delayed or there’s a sudden halt to a piece of work. Consider using this time for pro bono projects
- And in agencies, how many hours could be freed-up if scope creep and over-servicing were reduced?

The better you are at managing your resource, the easier it will be to commit some of that resource to pro bono working. By improving forecasting and resource planning, pro bono feels less like a compromise and more like a productive use of time.

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Benefits and Challenges - Not-For-Profit

Benefits

Accepting the offer of free professional support is not as straight-forward as receiving sponsorship or cash funding, but if the partnership works then the benefits are substantial.

Supporting Your Future Commitment to Communications

Working in partnership with communications specialists provides an opportunity to enhance your communications output over a set time frame and to assess the impact of the work. The offer of support is a responsible way to consider your future spend on an in-house communications role or function and the contribution communications can make to achieving organisational goals.

Extending Team Skills

You may ask your pro bono partner to upskill your team either formally or through on-the-job learning. When the partnership comes to an end the team may continue to deliver communications support and the experience may also result in changing their existing role profiles to incorporate communications elements.

Enhancing an Existing Function

If you already have a communications function, you may decide to extend the remit during the time you are receiving pro bono support. For example, you may launch a new digital channel, create a content plan and library or extend the reach of an existing campaign.

Challenges

It is often the fear of the unknown that is the barrier to seeking pro bono support. You may feel uncertain about working with a team from outside your organisation and you may also not know how to find the right pro bono partner.

Consider the following:

- There is no set way to find a pro bono partner but don't hold back in communicating about the 'search'. Brief your trustees, post on your social media channels and do your own research, looking for agencies who may have clients in your sector or with whom you have an affinity with – do you like what they say on their website?, are you impressed by their work?
- Receiving pro bono support from communications experts is something to be proud of and is a progressive and responsible approach to your organisational growth – communicate the partnership and celebrate the success you achieve together
- Remember this is a partnership. Your role is to be clear about what you want to achieve through the communications support and don't be afraid to say where your gaps are. Remember that your partner is doing this to learn from you too – it is a fair exchange.

Adeela Warley, CEO of CharityComms, says,

“Organisations of all kinds recognise that partnerships between the not-for-profit and commercial sectors can create many mutual benefits. As with any type of partnership, it's important for both parties to maintain high standards and that the impact is recorded effectively. There is huge value to bringing diverse groups of people together to deliver creative and compelling work.”

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WHERE DO YOU START?

A commitment to pro bono working should be captured in a pro bono strategy and actively supported by the leadership team. It may be part of a wider responsible business strategy or an action plan to achieve B Corp Certification. It's important that, whichever, the commitment has full buy-in across the team, that resource is factored into your plans and that you agree to honour this commitment.

What matters is that the benefits you gain are not your reasons for doing it (although they can provide a useful justification) and that you all agree with the principle of behaving responsibly, collaborating and giving something back.

The first consideration is how much time do you want to dedicate? A medium to long-term pro bono partnership between an agency or in-house team and a charity or social enterprise can enable you to deliver a significant piece of work which makes a meaningful difference.

But delivering one-off events and enabling individuals to pursue stand-alone projects may also have a place in your pro bono strategy.

Below is a recommended step by step guide to entering and maintaining a medium to long-term pro bono partnership.



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PRO BONO PARTNERSHIPS - KEY PRINCIPLES

1. Finding the right partner



The most important factor when entering a pro bono partnership is that your organisations share the passion for the cause and both partners should be aligned on values. Other considerations may relate to the nature of the work that is needed, the demographic of the community served or simply geographic location.

So, in summary, ask yourselves the following:

- **Is everyone passionate about the cause and the work?**
- **Do the pro bono partners share the same organisational values**
- **Does the team delivering the pro bono have the right skill set?**
- **Is there mutual respect in the partnership?**

3. Agree Communications Objectives



Sit down together and establish the objectives and success criteria of your work. For example, it may be raising the profile of the organisation with a particular stakeholder, augmenting their social media presence, or creating a campaign to address a particular issue or policy. Committing time to the partnership is likely to be the Achilles heel, so be focused and aim to do “a few things well.”

5. Be Brave, Be Creative



Enhancing creativity and innovation in communications should be a universal objective and pro bono working gives you the freedom to take creative risks. Providing you are all on the same page, this is a great opportunity to try something new, accepting that learning by mistakes is how we all advance our skills. Enhance the creative experience by kick-starting the work with a well-structured creative workshop and involve people from outside of the core teams.

2. Partnership Goals



Have an open discussion at the beginning about what you hope to get out of the partnership. If you are keen to build the confidence of members of your team or if you want to win awards for great work, then say that! Or perhaps you want to give your mid-level managers a specific challenge. For the not-for-profit organisation, having a pro bono communications partner may be a stepping-stone to building an in-house function and sharing this at the outset may have an impact on how the work is set up. At this early stage, it is also critical to understand each other's ways of working, internal stakeholders who need to be kept updated and other organisational priorities which may come into play.

4. Immersion



In the early stages of the partnership, you need to ensure that you are “sharing the love” of the partnership across your organisation. As well as appointing a core team to work on the project, involve others in workshops and one-off projects. Discuss how you can immerse your full team in the goals and purpose of the work. This should go beyond going on their website, reading their Annual Report (sometimes shared as an Impact Report) or social media posts. Ideas include attending educational events, taking part in fundraising activity, inviting the CEO to deliver a presentation at a company meeting or arranging for a member of the community they serve to do a talk. The more you can be immersed in their purpose the more effective it will be.

6. Measuring Impact



Be clear on how the impact of the communications will be measured. This should include the impact of the work itself (so the usual suspects like audience reach, message delivery and behaviour change) but also how this ladders up to the overall purpose of the not-for-profit organisation. Discussing this at the outset will help you define what measurement you can use. Include both qualitative and quantitative measures.

When the project is completed insist on doing a thorough evaluation and wrap up where you discuss both the work and the relationship. Any constructive feedback will help you both get more out of your next partnership! And of course, also make sure you recognise and celebrate success together.

Don't forget to record the time spent on the pro bono work on a separate job code. This could be an important measure for your ESG evaluation or B Corp Certification.

7. Exit Plan



It may seem odd to be discussing the split when you have only just got to know each other but agreeing a plan at the end of your commitment period is essential. If extending the relationship is not going to be an option, then be clear about that. There is nothing worse than coming to the end of your commitment and feeling that you are leaving your partner in the lurch or under-valued. It is also important to discuss legacy from your work, what have you learned and what should be maintained as a result?

Partnership Agreement

Discuss and capture all of the above in a Partnership Agreement at the start. The purpose of the partnership agreement is to ensure that both parties are thinking along the same lines. Among other things, you need to be clear about what you hope to achieve and why you are both investing in it. Often the discipline of putting this in writing can reveal misunderstandings or differences of expectation.

PARTNERSHIP AGREEMENT - A CHECKLIST

- What are the goals of the partnership and the focus of the work?
- What does success look like for all involved?
- What are the immersion plans?
- Who is the partnership sponsor? - both partners should name a senior sponsor and these individuals should agree to have regular check-ins
- Who will work on the project and approximately how many hours per month and for how long?
- How will the partnership and the work be communicated to Agency and not-for-profit stakeholders? (e.g., clients, potential clients, donors, trustees)
- When is the partnership ending and what is the legacy?
- What legal and compliance documentation is needed to support the partnership? e.g., confidentiality agreement, professional indemnity, intellectual property and data protection.

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CASE STUDY: THE CAMPAIGN TO END LONELINESS AND HAVAS JUST::

By Jo Hewitt, Director - Head of Integrated Communications and Agency Culture, Havas Just::

Finding Partners

Every year, Just:: commits to pro bono partnerships through our purpose initiative, A Just Cause. We have done this from day one in 2006, because we believe in “*giving back*”. In 2019 we decided to invite charities to apply to work with us on a pro bono basis. We posted about it on social media and sent out an announcement to third sector media. The Campaign To End Loneliness (CTEL) applied because they wanted to extend the reach of an existing campaign called Be More Us. They were clear that they wanted to deliver an experiential consumer campaign which gave tangible examples of how to tackle loneliness.

The Campaign

One of our values is collaboration, and for this project we decided to bring in further skills from film makers The Edge Picture Company. They also worked pro bono and together we created a comedy short film about the value of striking up a conversation with people you meet when you are “*out and about*”. Comedian Andy Parsons heard about the project and signed up on a no-fee basis. The campaign was supported with stand-out digital content to drive the call to action.

CTEL worked with an external evaluation partner to evaluate the impact of the campaign both qualitatively and quantitatively.

Benefit to CTCL

- The campaign film received 7.4 million views on You Tube (<https://www.youtube.com/watch?v=kEOpEDWE1Og>)
- The campaign drove traffic to the CTCL website where the public accessed more information about the issue of loneliness and how they could help
- The campaign digital content reached over 13 million people
- Following the success in 2020, CTCL later delivered a new phase of the campaign with support from a pharmaceutical company

Benefit to Havas Just::

- The pro bono team learned a lot working with CTCL and achieved professional development goals including client-handling skills, budgeting and workshop facilitation
- Award-winning work – the film won Gold at EVCOM London film awards, Silver Dolphin Award at Cannes Corporate Media & TV Awards, Silver at the London Clarion Awards & Communicate Award for Creative Execution
- The campaign was a key discussion point in candidate interviews and played a significant part in engaging new talent



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INDUSTRY EXAMPLE: THE LEGAL PROFESSION

For lawyers around the world, the concept of pro bono working is familiar and has been part of the infrastructure of the profession for over 20 years. In November 2022 the 21st Annual Pro Bono Week recognised the voluntary contribution made by the legal profession working for many individuals and organisations, including but not restricted to charities and social enterprises. So, what can we learn from them?

Set Industry Standards - In the US the American Bar Association Model Rule 6.1 provides that “Every lawyer has a professional responsibility to provide legal services to those unable to pay”. It sets an aspirational target of 50 hours per year and at the same time mandates that “Law firms should act reasonably to enable and encourage all lawyers in the firm to provide pro bono legal services called for by this rule”.

In the UK law, firms are measured on key metrics which increasingly include number of UK pro bono hours worked, pro bono hours per UK fee earner, percentage of lawyers doing pro bono and whether the pro bono hours count towards individual’s utilisation targets.

Incentivise Individuals - in the UK, many firms set individual targets for pro bono hours and promotions at all levels depend on whether this is met. For example, at Lewis Silkin, a leading law firm, employees are encouraged to undertake 30 hours per year supporting the firm’s Responsible Business initiatives (which include pro bono) with 20 pro bono hours a year counting towards their utilisation targets and being mandatory for promotions for all its lawyers.

Be Accountable – law firms routinely set organisational targets for the number of pro bono hours they deliver each year. They facilitate the commitment by adopting company-wide schemes but also the flexibility to support individual’s chosen projects, providing they meet the agreed criteria.

Sam Pennington, Chair of the Responsible Business Group at Lewis Silkin,

“We live in a society where professional legal services are too often unavailable to those who need them the most. Lawyers are some of the few people with the ability to make a positive difference and embracing this responsibility is simply the right thing to do. We strive for an environment where pro bono is as much a natural part of the role of a lawyer as acting for fee paying clients”.



A Call to Action

As a student of social enterprise and an advocate of pro bono working throughout my career, I believe that now is the time for the healthcare communications industry to consider their commitment. People want to work for organisations who commit to having a purpose as well as making a profit. They want to have the opportunity as individuals to work on stimulating projects that have a social or environmental impact. As an industry, pro bono partnerships offer the chance to demonstrate the critical role that brave and creative communications can play in organisational success.

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