

Some Practical Pointers for Success

The table below outlines success factors that any consultant needs for a project to be successful. It also, in the right-hand column, highlights key issues for Pro Bono volunteers. These issues are characteristic of many (not all) Pro Bono projects, and form part of the interest and challenge of third sector work. Please do not hesitate to contact the Pro Bono Manager if these or other issues are causing difficulty.

Success Factors	Issues for Pro Bono
Behave professionally and ethically	Only take on projects for which you are technically qualified. Ask for help from our experienced mentors if you need technical advice.
Understanding and clarifying risks to successful project completion	Note client engagement issues below. Be clear about your availability and any risks of you being unable to finish the project.
Being able to think on your feet	Don't try to bluff where you have no knowledge. Admit you will need to ask for advice from colleagues.
Careful listening to client (including probing for underlying issues)	
Client engagement	Some charities experience frequent personnel changes, which may affect project continuity. Try to make sure that you always have contact with someone who understands what you are doing and wants your output. Even with continuity, other demands on the client may cause them to de-prioritise the project. Be sensitive to/respect their changing priorities, but get in touch with the Pro Bono Manager if it is becoming problematic.
Consultant has done their prior research	This should include sector understanding. Review all the materials on our website to see what might be relevant to you.
Good communication and trust	Need to use appropriate language (see 'prior research').
Not scaring client off	Bear in mind possible relative inexperience.
Identifying key stakeholders	Bear in mind particular structure of sector, including respective roles of volunteers, trustees and paid staff.
Suitable client expectations, well-managed	Many charities, especially small ones, have little or no experience of consultancy or analysis; bear this in mind and be willing to be flexible and adaptable.

Clients (and the right people at the client) have time to give information	Understand clients' time constraints (especially an issue for trustees, or for small delivery-focused charities).
At some point before it is too late, there is an agreed product/ToR/timing/scope/report/plan	Greater flexibility may be necessary because of clients' relative inexperience. Danger of project drift due to client inexperience and your own emotional involvement and desire to 'do good'. Commitment to timings should be as rigorous as paid external consultant; don't think, or allow client to think, that because it is unpaid, standards can be lowered mid-project.
Having empathy (i) with organisation's objectives, (ii) with organisation's way of working	Need client to believe in your empathy. Don't allow your empathy to override your professional judgement. Be willing to challenge when necessary.
Technically competent consultant (includes ability to put self in client's shoes)	Emotional or social drive to do something for the charity may override professional judgement on own competence. Need to be willing to pull out if necessary, but also need to consider what would be most helpful for the charity, and adapt practice to meet their needs. Need to be willing to agree different product if necessary.

Table 1: Success factors and pro bono issues, Ruth Kaufman, Sept 2014