

# Team Consulting Pro Bono Project Portfolio

When the right team comes together for the right project, amazing things are possible. In the case of skills-based volunteering, when a group of skilled volunteers are matched with a well-defined nonprofit challenge and get to leverage their talents in a new context and in collaboration with nonprofit leaders, social change happens. Particularly in times of crisis or uncertainty, nonprofits – and the communities they serve – benefit from renewed capacity and stronger infrastructure.

Common Impact offers the following portfolio of sample team consulting projects that can be completed virtually (or in-person, when it's safe to do so) in a 6 week – 6 month team engagement.



Contact us at [partners@commonimpact.org](mailto:partners@commonimpact.org) to design a skills-based volunteer project that aligns the skills of your employees with the needs of nonprofits

## Strategy / Cross-Functional Projects

### **Strategic Plan Development**

A team develops a strategic plan for an organization, which can include conducting an environmental scan/market analysis, facilitating a discussion of organizational goals and priorities, or documenting an operational plan to achieve these goals.

### **Strategic Growth Planning**

A team assesses an organization's strategic plan and re-defines growth and impact goals, in light of a new opportunity or operational or crisis effects on service model, finances, and staff.

### **Product/Service Delivery Innovation**

A team adapts an organization's core services or products for virtual delivery, social distancing protocols, or a new operating environment by providing strategic, operational, technical, and communications recommendations.

### **Program Value Assessment**

A team assesses an organization's specific or proposed program to identify its financial, operational, and mission contribution to the organization as a whole. In a crisis scenario, this assessment can inform an organization in making a holistic decision to continue or sunset specific programming or initiatives.

**Feasibility Analysis**

A team conducts research to determine the practicality of a proposed product or program, assessing the environmental, financial, and operational considerations for the proposed venture.

**Partnership Network Strategy**

A team conducts a landscape assessment of peer organizations and networks to define a strategy for the organization to partner with other community-based nonprofits or corporate partners. This could include facilities sharing, product delivery, in-kind or volunteer distribution, and client and service referrals.

## Operations/Programming Projects

**Business and Services Continuity Planning**

A team assesses an organization's continuity of operations (COOP) plan and provides recommendations for infrastructure, facilities, technology and staffing protocols for significant and unexpected interruption in operations.

**Demand Surge Modeling**

A team models different volumes of output needed from an organization (e.g. meals, counseling sessions) during various disaster scenarios. The model will support decision-making for staffing and budgeting during times of crisis by factoring in demographics, resources, and peer organizations of the area served.

**Process Innovation**

A team recommends temporary process or operations modifications to maximize efficient use of staff, volunteers, space, and other scarce resources during times of stability or crisis. The plan may include visual flow-charts and emphasize strategies to maintain program quality, adhere to public health requirements, and avoid staff and volunteer burnout.

**Volunteer and / or In-Kind Donation Management**

A team conducts an assessment of an organization's capacity for volunteer and in-kind donations and develops messaging recommendations for redirecting or requesting additional support during an influx or dip in resources.

**Earned Revenue Product Strategy**

A team supports a nonprofit in developing or adapting a product as part of an earned income revenue strategy. In a crisis scenario, volunteers will provide guidance on adjusting the product's business plan for operating in or rebounding from crisis or economic downturn conditions.

## Financial Management Projects

### **Financial Scenario Planning**

A team analyzes an organization's current financial data to simulate various financial scenarios. The model can help an organization define a budget and financial strategy for potential emergency scenarios.

### **Program Financial Assessment**

A team analyzes the financial costs and expenses of a specific program or initiative to determine its net financial value to an organization. In a crisis scenario, this analysis can inform an organization's decision to sunset or invest in programming.

### **Volunteer Workforce Valuation**

A team quantifies the financial costs of operating with a reduced volunteer workforce during times of crisis. This analysis can include costs associated with loss in productivity and hiring part-time staff to replace volunteers. The team uses this analysis to develop recommendations for financial decision making and alleviating losses.

### **Investment Strategy and Review**

A team provides insight on what individual investors look for in an investment and supports thinking through how to "package" services to potential donors.

### **Financial Systems Assessments**

A team reviews a nonprofit's financial management systems to identify challenges and provide recommendations on new processes or vendors that will better serve the organization.

### **Market Entry Assessment**

A team assesses the financial benefits and drawbacks of entering into a new market by analyzing the marketplace and providing recommendations on pursuing the venture.

## Human Resources Projects

### **Temporary or Emergency Staffing Plan**

A team assesses an organization's staffing structure and outlines an emergency staffing plan to operate with reduced, remote, or increased staff based on service and program delivery needs.

### **Benefits and Compensation Review**

A team develops a compensation philosophy or analyzes compensation research (often requires purchase by nonprofit) to determine average salaries and benefits offered by similar nonprofits.

### **Performance Review Development**

A team revamps the performance review process for employees of a nonprofit organization.

**Diversity, Equity, and Inclusion Review**

A team assesses an organization's DEI policies and provides recommendations for increasing diversity in hiring, retention, and advancement. In times of crisis, the recommendations will include strategies for retaining DEI values during unavoidable staff reduction and layoffs.

**Recruiting and Hiring Process**

A team works with key nonprofit staff to assess and/or build out the organization's recruitment and hiring process, including sharing best practices and tools for recruitment/hiring.

**HR Training**

A team conducts training that would advance the human/people assets of an organizations (e.g. Board training, staff training, program/client trainings).

**Personnel Policy Development**

A team with significant experience in employment law updates or creates an employee handbook for a nonprofit organization with detailed documentation about personnel policies.

**Succession Plan**

A team works with a nonprofit's leaders and Board of Directors to develop a strategic roadmap for a nonprofit leadership transition.

## Marketing & Communications Projects

**Crisis Communications Plan**

A team assesses the key internal and external audiences that an organization must communicate with during a crisis and develops recommendations for a communication plan including technology solutions to streamline and auto-generate mass messaging.

**Defining an Organizational "Pitch"**

A team crafts a foundational messaging platform (positioning statement, tagline, and key messages) and then tweaks that messaging platform to target the different, unique audiences of the nonprofit organization.

**Digital Communications Plan**

A team crafts an integrated digital communications plan (may include website, social media, email or other online channels), focusing on bringing together consistent content approach, design, and user experience.

**Marketing or Communications Plan**

A team develops an introductory marketing or communications plan for an organization, program or an event, including a brief landscape or peer assessment, core audience and message segmentation, and an overview assessment of key distribution platforms and channels.

**Collateral Audit**

A team analyzes existing organizational collateral (marketing material) for consistency of messaging, look and feel and provides documented recommendations to improve or create greater alignment across the marketing portfolio.

**Collateral Development**

A team revamps or develops a piece of marketing collateral (e.g. brochure, e-newsletter) to create a visually appealing and consistent message.

**Branding Audit**

A team defines and documents an overview of a nonprofit organization's brand attributes, target audiences, characteristics and communications tone and provides recommendations for future brand planning.

**Unique Value Proposition Development**

A team conducts a landscape scan of peer organizations and helps an organization define and communicate their unique value proposition.

**PR Strategy Development**

A team provides an assessment of an organization's current public relations strategy (if one exists) and crafts a framework for media cultivation and distribution, including identifying and developing priority press relationships and crafting a few relevant media messages (e.g. talking points, a press release).

## Technology Projects

**IT Infrastructure Assessment & Strategic Plan**

A team assesses all elements of IT Infrastructure, develops recommendations for infrastructure improvements to support operations and crafts a 3-5 year plan for strategic IT investment and implementation.

**IT Infrastructure Assessment or Migration**

A team assesses an organization's IT infrastructure to identify weak spots in the event of physical disruption or a spike in utilization. The team provides recommendations for strengthening systems and/or migration to cloud based infrastructure.

**Vendor / Platform Selection**

A team develops requirements for a new technology vendor or platform (e.g. for program delivery, fundraising, emergency management, data collection, CRM, website CMS, Cloud-based intranet) and guides the nonprofit through the selection process.

**Database Assessment**

A team assesses the use and architecture of a database system and recommends changes that would streamline operations and the end user experience.

**Database Development Project**

A team develops a database that supports an organization in more effectively managing operational or fundraising information such as enrollment data, program outcomes, and development statistics.

**Website Assessment**

A team analyzes an organization's website and documents recommendations for ways in which the visual design, architecture, and layout would better achieve the organization's goals.

**Website Development Project**

A team adds new functionality to an existing website, or creates a brand new site, that supports a nonprofit in engaging its key constituents more effectively.

**Network Assessment**

A team assesses an organization's current network infrastructure and develops recommendations to improve security and/or networking capability.

**Networking & Security Implementation Project**

A team develops a network that protects files against intruders, connects multiple offices to the same central file system, or builds networking infrastructure that facilitates office expansion.

## Client Relations Projects

**Stakeholder Conversation Strategy**

A team defines a strategy for cultivating new stakeholder relationships. The strategy will include best practices around having challenging conversations with stakeholders about an evolving situation.

**Sales Forecasting Process Development**

A team creates structure around a nonprofit's charitable contributions or earned income revenue streams by categorizing the different stages of the sales process, assigning metrics and forecasting tools to each stage, and coaching internal stakeholders on how to translate ambiguous conversations into tangible forecasting.

**Client Relationship Infrastructure Planning**

A team assesses a nonprofit's client relationship systems and processes (including relationship management goals, organizational approach to relationship building, staff capacity and technology systems) and develops a roadmap for how to solidify and grow infrastructure to support effective client relationships.

**Client Growth / Retention Planning**

A team reviews a nonprofit's data collection and management systems and provides recommendations on new processes or vendors that might better serve the organization's data and reporting needs during regular operations or times of crisis.

**Customer and Client Service Management**

A team develops a customer service best practices training including strategies for customer communication and retention, or provides a framework for reestablishing or regaining trust from a former or troubled client relationship.

**Data & Analytics Projects****Data Management Assessment**

A team reviews a nonprofit's data collection and management systems and provides recommendations on new processes or vendors that might better serve the organization's data and reporting needs during regular operations or times of crisis.

**Data Visualization**

A team analyzes an organization's existing data analysis processes and provides recommendations for data visualizations that would allow a nonprofit to better leverage that information in decision-making.

**Team Consulting Success Stories**

[JPMorgan Chase volunteers help an LGBTQIA+ entrepreneurship nonprofit expand](#)

[Fidelity Investments volunteers help the American Red Cross craft a technical solution to help their staff effectively distribute donations during times of crisis](#)

[City Link and Fidelity work together on City Link's organizational expansion](#)