**Tips For A Successful Pro Bono Engagement**

1. **Meet once face-to-face**. To the extent possible, try to hold the interview in person. Even if you plan on working together remotely, holding the interview (or at least the kick-off meeting) face-to-face makes a big difference in building rapport quickly. If an in-person meeting is not possible, try out a video conference call.
2. **Refine the scope**. Once the engagement is confirmed, use the first meeting to revisit the scope--what all parties agree the work will include and will not include. We cannot emphasize enough how important it is to have a clearly-articulated scope which both parties agree upon. It will serve as the compass that keeps everyone on task and on schedule and prevents the insidious and infamous “scope creep!”
3. **Communicate often**. At the first meeting, establish your preferred mode of communication and set dates for future check-ins and/or meetings. This will help with accountability, project management and solidifying your relationship. Build-in opportunities to provide feedback, clarify expectations and problem-solve.
4. **Create a work plan**. While an extensive work plan might feel too formal, successful engagements have work plans that are agreed to early-on and lay out at a minimum clear deliverables with specific tasks, the timeline and the person responsible for completing each task. The template below should be helpful.

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| **Deliverables**: specific, tangible products | **Tasks**: the specific activities required to execute the deliverable | **Hours:**  Hours required to complete task | **Timeline**:  timeframe specifics | **Person Responsible:**  consultant or staff person at the nonprofit |
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1. **Set expectations**. Consultants should establish the number of hours they are able to give pro bono. It is important to set expectations upfront and define how you will communicate the hours spent on tasks.
2. **Reach out to us**. Whether you want to share exciting developments or need help problem solving, we are here to help! Please do not hesitate to contact us at [jcfprobono@sfjcf.org](mailto:jcfprobono@sfjcf.org).