



Sample Chapter Pro Bono Chair/Director Job Description

The Chapter Pro Bono Director is at the heart of the FPA Pro Bono Program. The successful director is encouraged to develop and exhibit skills in leadership, community relations and public speaking. He or she is encouraged to achieve the following items. The director may also wish to delegate specific items to other members of the chapter pro bono committee to spread the workload and foster team leaders.

1. Establish the Chapter Pro Bono Program
 - Establish a pro bono committee, including administrative support and a succession plan
 - Establish and maintain chapter's vision regarding pro bono service
 - Create a pro bono plan of work using the [Leadership System](#).
 - Represent the chapter pro bono program at all regular board and chapter meetings
 - Ensure that chapter by-laws include the pro bono chair/director position
 - Integrate the pro bono program with the chapter board and chapter activities
 - Avoid conflicts of interest as a board member and address such conflicts at board meetings
2. Identify and Develop Pro Bono Opportunities
 - Be familiar with FPA's pro bono program guidelines
 - Ascertain and define members' interest in partnering with local charitable or non-profit Community-Based Organizations
 - Build partnerships with CBOs for delivery of pro bono services
 - Develop connections with local organizations serving populations in need and recruit appropriate potential partners
 - Conduct basic due diligence on the local organizations (e.g. interview organization's leadership, obtain current financial reports)
 - Create and execute an agreement covering the population to be served, the scope of the engagement, and the goals of the engagement, ensuring that they are in line with FPA Guidelines and the chapter's vision
 - Vet partnerships developed and brought to the chapter by individual members to ensure they are in line with FPA guidelines and the chapter's vision
 - Monitor partnerships to ensure that the goals and expectations of CBO partners, pro bono clients and chapter pro bono volunteers are being met
3. Recruit Chapter Members For Pro Bono Service
 - Promote the pro bono program to chapter members who may be interested in volunteering
 - Promote the benefits of pro bono service to the community
 - Promote the benefits to the chapter and the profession (e.g., higher community profile, building trust, enhancing member recruitment and retention)
 - Promote the benefits to the volunteer (e.g. satisfaction of giving back, fun, honing skills, fulfilling experience requirements for CFP candidates)
 - Provide volunteers with information and training regarding the FPA Pro Bono Guidelines and basic best practices
 - Work with partner CBOs to provide information and training regarding the needs and special considerations of the target population
 - Structure a mentoring relationship between veteran pro bono volunteers and new volunteers
 - Monitor volunteers to ensure that their expectations and needs are being met
4. Administration, Communications and Reporting
 - Oversee administration and reporting of chapter activities (See Administrator job description)
 - Vet and keep a record of any pro bono engagements converted to paid engagements
 - Monitor volunteer adherence to FPA guidelines and be prepared to handle client complaints
 - Work with the chapter public relations director to handle media outreach and inquiries
 - Provide a monthly or quarterly report to the chapter's board
 - Inform FPA's Director of Pro Bono Services of chapter's pro bono activities





Sample Chapter Pro Bono Administrator Job Description

A successful chapter program will need administrative support as it grows in size and scope. Such support might be provided by the chapter executive, by an additional part-time staff person, or by a volunteer. He or she is encouraged to achieve the following:

1. Chapter Pro Bono Program Administration

- Provide general administrative support to the pro bono director as needed
- Manage volunteer intake
- Maintain a database of all volunteers to track participation, time spent and type of assistance offered to submit to the chapter board and FPA's Pro Bono Department on a regular basis
- Maintain copies of all documents, including partnership agreements, client engagement letters, and client requests to convert to paid engagements
- Handle referrals – matching volunteer planners with clients – in consultation with the director
- Distribute materials to volunteers in advance of meetings/seminars/engagements
- Provide event management as needed