

Pro Bono Sector Impact Toolkit

A PRACTICAL GUIDE FOR MEASURING THE IMPACT
OF YOUR ORGANISATION'S LEGAL PRO BONO WORK

THE NATIONAL
PROBONO CENTRE

NCVO



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Foreword

This toolkit is the product of a project initiated by the National Pro Bono Centre ([NPBC](#)), the charity dedicated to supporting individuals and organisations providing pro bono legal assistance in England and Wales.

This project was developed in response to feedback from charities who said they needed support to better understand and articulate the impact of their work. In January 2024, NPBC commissioned the National Council for Voluntary Organisations ([NCVO](#)) to help realise this project, which aimed to:

- strengthen the way legal pro bono charities describe and measure the difference legal pro bono makes; and
- support a consistent approach across the legal pro bono charity sector.

Both NPBC and NCVO would like to thank all the individuals and organisations who gave their time, skills and ideas to make the project such a productive and collaborative effort, especially our pilot organisations LawWorks and University House. Our special thanks go to the project steering group. We are also grateful to Kirkland & Ellis for their design and layout work.

We know that you are delivering meaningful work and making a difference every day. We hope the resources and tools support and inspire you in the monitoring and evaluation of this work, helping you learn about what you deliver, increase impact, and build relationships with stakeholders.



Esther McConnell
CEO
National Pro Bono Centre

Introduction

The purpose of this toolkit is to assist pro bono charities and organisations in measuring and demonstrating the impact of their work. Co-designed by the National Pro Bono Centre (NPBC) with a wide range of organisations and individuals in the legal pro bono sector through a series of workshops, and further developed by specialists at NCVO, this toolkit is expressly intended for use by all kinds of organisations with differing needs.

Having been piloted successfully by LawWorks to measure cross-organisational impact, and by University House to measure project-specific impact, both organisations share useful reflections throughout this toolkit.

The central foundation of this toolkit is a focus on theories of change, which we will explain should underpin all aspects of your work. Put into practice, a theory of change will support you to:

- understand and explain how your work achieves wider change;
- improve the effectiveness and efficiency of your work;
- demonstrate the value for money your work achieves; and
- make compelling arguments for funding to continue and expand your work.

The toolkit is an impressive body of work. We used it to demonstrate how a high-value project proposal could achieve substantive change.”

– Eddie Coppinger, Director, University House

“

We wanted to better understand the difference our work is making across the organisation, both for the people we support and for those delivering pro bono services. Developing a clearer approach to impact measurement has helped us articulate our value, strengthen our learning, and ensure we are focusing our efforts where they have the greatest effect.”

– Hayley Nock, Head of Strategic Development, LawWorks

Contributors

Steering Group

- LawWorks
- Advocate
- Norfolk Community Law Service
- South West London Law Centres
- Free Representation Unit
- Slaughter & May

Workshop Participants

- University House
- Access Social Care
- Central England Law Centre
- YESS Law
- Spire Barristers
- Simmons & Simmons
- TrustLaw
- A4ID
- Action Against Medical Accidents
- Centrepoint

Impact measuring journey

Across the vibrant legal pro bono sector, our many organisations take a wide variety of approaches to achieving their aims.

The resources in this toolkit will enable your organisation to develop a theory of change that is best suited to your own approach.

Your theory of change can be limited to a single project, or it can be organisation-wide. Measuring impact is ultimately a journey that can take organisations in different directions depending on what you are trying to discover or articulate.

To help you, this toolkit includes **five models** which illustrate what a theory of change could look like for different types of organisations, depending on what you are measuring or how you approach your work. Alongside each model, we have included examples and insights into measuring outcomes corresponding to the relevant type of activity.

It is likely that no single model is a perfect fit for your organisation, though some trial-and-error is to be expected. These models will support you to develop your own theory of change for

your project/organisation, and you can ‘pick and mix’ across our models to get started.

With each model, we have included an explanation of the theory of change, a selection of indicators that can be used to track outcomes, and suggested methods of collecting data corresponding to these indicators. There are a number of examples and templates which highlight best practice for creating surveys and reports.

For ease of use, this toolkit comprises separate documents for each model, as well as related resources covering survey design, case studies and impact reporting. We have made the visual component of each model, as well as a blank template, available on [Canva](#) to provide an easy-to-adapt basis for your own theory of change.

Rest assured that you do not need to use every tool or measure outlined in the models. Most organisations will start small and build over time. Once you start using these tools, you can revisit them over time to refine and tailor your approach.

5 models for a theory of change

01 Client work for individuals

For organisations or projects which primarily **deliver pro bono directly to individuals** in the form of advice, casework or representation.



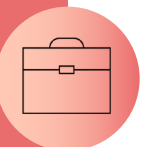
02 Client work for organisations

For organisations or projects which primarily support **charities, social enterprises or community groups** with matters including legal advice, casework and governance.



03 Collaboration with pro bono lawyers

For measuring the impact of **working with pro bono lawyers**, including on capacity and sustainability.



04 Legal sector pro bono work

For measuring outcomes for **volunteers and/or legal sector organisations** participating in pro bono, such as on skills and motivation.



05 Policy influencing

For organisations or projects which **contribute to policy, practice, or systems change**, such as through evidence, stakeholder engagement or strategic litigation.



“

The flexible, ‘pick and mix’ approach allowed us to tailor the framework to our programmes.”

– **Hayley Nock**, Head of Strategic Development, LawWorks

Implementation in practice

To implement the toolkit effectively:

- **Secure leadership buy-in early:** Ensure senior leadership (including trustees and board members, where appropriate) understand this toolkit's purpose, the time commitment, and how learnings from it will be used – this helps to protect time and sustain follow-through. This is particularly important if you are measuring impact across your organisation, as it may raise fundamental questions about how your organisation works.
- **Co-design internally:** Involve staff and volunteers in selecting the minimum set of measures so it feels realistic and useful.
- **Co-design with beneficiaries:** Where possible, even light-touch feedback from beneficiaries can improve relevance and inclusion.
- **Use findings:** Plan a short reflection session to turn data into decisions. Even if you don't have the capacity to produce an impact report, it is still important to reflect on and learn from the findings. Don't be deterred if your data suggests something isn't working as well as you hoped – use it to improve! This is one of the strengths of this approach.
- **Keep it simple:** Take small steps at first!

“

We're still in the early stages of rolling out our approach, but the process has already helped to inform internal discussions and shape our strategic thinking. Over time, we expect it will enable us to articulate our impact more clearly to funders, partners and stakeholders, and to demonstrate the value of our work more consistently and on a cross-organisational basis.”

– Hayley Nock, Head of Strategic Development, LawWorks

EVALUATING YOUR USE OF THE TOOLKIT

01. Plan

- Secure buy-in and design your approach
- Start with a model theory of change (based on the type of pro bono you deliver)
- Confirm your outcomes and evaluation framework
- Select a “minimum viable” set of measures

02. Do

- Collect lightweight measuring and evaluation data as you go

03. Learn

- Review what the data says about outcomes and quality
- Sense-check findings with staff/volunteers and – where possible – clients

04. Review

- Summarise results using something like the impact report template
- Decide what to change, what to keep, and what to measure next cycle

“

The toolkit has helped us to collect and structure data more pro-actively, instead of waiting to see what funders will ask for.”

– Shah Begum, Projects Director & Solicitor, University House

Impact Measuring Lifecycle

—

Planning

Assumptions

Data collection

Reporting

Planning

A **theory of change** is a specific and measurable description of social change that forms the basis for planning, ongoing decision-making and evaluation, based on evidence and experience. Typically, your organisation's theory of change will set out:

- **the intended impact:** the long-term change you are working towards;
- **the outcomes:** the shorter-term changes you expect and how they contribute to achieving that impact;
- **the activities:** what you do, and how these activities are expected to support change;
- **the assumptions:** the conditions, enablers and risks that influence whether change happens as expected.

Not everything can be realistically measured, so typically some **outcomes** and **activities** are prioritised. These are usually the ones which are pivotal to your work, which represent the result of a chain of smaller changes, which unlock other outcomes, or which are most relevant to your funders or potential funders.

Each model theory of change in this toolkit comes with an **evaluation framework**, which explains how to measure progress

towards outcomes through **indicators** and an appropriate method of **data collection**.

Assumptions

Every theory of change relies on certain assumptions which must hold true for change to happen. Identifying assumptions can be useful to identify risks, test learning and strengthen decision-making. Some of the assumptions an organisation in the pro bono sector might make include:

- **Demand and engagement:** Individuals, organisations or partners are willing and able to engage with pro bono support when it is offered.
- **Appropriateness of the intervention:** The type and scope of pro bono support provided are suitable for the needs being addressed and are delivered at the right time.
- **Quality and consistency:** Pro bono support is of sufficient quality, consistency and continuity to contribute meaningfully to change.
- **Capacity to act on support:** Clients or organisations have the capacity, resources and stability needed to act on the legal support or advice they receive.
- **External environment:** Wider factors such as policy, funding, court backlogs, or organisational contexts do not prevent

intended outcomes from being achieved.

- **Volunteer capability and motivation:** Volunteers have the skills, confidence and support needed to deliver effective pro bono work and remain motivated to participate.
- **Effective coordination and relationships:** Relationships between charities and legal firms are well-managed and based on shared expectations.
- **Learning and adaptation:** Organisations can reflect on learning and adapt their approach in response to what evidence shows.

Does the success of your work rely on any of these assumptions? Are there other assumptions underpinning your work? Reviewing these can be a useful reflection on your work and your context.

Another point to consider: contribution, not attribution

Pro bono support is usually one of several factors that contribute to change. Exploring this can support learning and reflection. Where appropriate, you might ask clients or organisations questions such as: "What else helped to bring about this change?"

Data collection

You will need to collect data to measure your impact against the indicators in your theory of change. This toolkit includes resources you can use to carry out surveys in line with best practice, as well as tips on storing and evaluating that data, all of which can be adapted as needed:

- a. Survey design advice:** A GDPR-compliant introduction and optional profile questions which you can use in any survey.
- b. Core client/org survey:** A short set of questions focusing on satisfaction, outcomes and what next, designed to work across client work with individuals and organisations.
- c. Core pro bono lawyer survey:** A short set of questions for volunteers (and, where relevant, firms/chambers) to understand experience and outcomes from delivering pro bono.
- d. Model examples:** Example question sets corresponding to each model theory of change.
- e. Guidance:** Information on how to distribute surveys and build your own questions and tools.

Reporting

Once you have collected your data, you will want to review it, learn from it and report it, for example to stakeholders or funders. There are many ways to report impact, including videos, presentations, webpages or dashboards. These are often brought together through an impact report.

This toolkit includes an impact report template to help you think about structure, alongside guidance on how to describe what you delivered, what changed as a result, how you know this and what you will do differently in the next cycle.

Further reading

[NCVO evaluation guidance \(evaluation frameworks, building tools, analysis and report writing\)](#) NCVO evaluation webpages

[NCVO theory of change guidance](#)

[Volunteering Impact Assessment Toolkit](#) (particularly useful if you want to learn more about other possible tools to use)

Glossary

Type	Term	Definition
General	Legal pro bono	As defined in the Joint Pro Bono Protocol available on the LawWorks website, "legal advice or representation provided by lawyers in the public interest including to individuals, charities and community groups who cannot afford to pay for that advice or representation and where public and alternative means of funding are not available".
	Pro bono charity	Charities that enable or broker legal pro bono, either as their primary purpose or as a key aspect of their work
	Activity	What your organisation delivers to create change in the world, such as services (e.g. providing advice or legal support, training, campaigning and influencing work), or research and the resulting reports
Monitoring, evaluation and learning (MEL)	Outcome	The real-world changes you create through your activities – changes for people, groups, organisations or wider society, or for things like the environment or justice system.
	Impact	The big picture, long-term change you work towards, rather than what you see on a day-to-day basis. Impact is complex, as many actors work to achieve it, making it more difficult to attribute to the work of an individual organisation.
	Monitoring	The routine, systematic collection of information to assess your progress against your plans.
	Evaluation	The use of monitoring and other information to make judgments on how you are doing.
	Indicators	The individual pieces of information you collect to tell you, for example whether an outcome has been achieved, how an activity has been delivered and to whom. They are expressed in neutral language.
	Assumptions	The underlying beliefs, based on evidence and experience, about why one step in the theory of change is expected to lead to the next and what must hold true for change to happen.



Model 1: Client work for individuals

This model has been designed for an organisation which primarily delivers pro bono legal services directly to individual clients in the form of advice, casework or representation.

— OUTCOMES AND INDICATORS

EXAMPLE SURVEY

LEGAL PRO BONO ACTIVITIES

Legal pro bono support to individuals:

- Legal advice
- Legal casework, representation and litigation
- Referrals and signposting to other legal services and support
- Facilitation of legal education for the public

ENABLING ACTIVITIES ↑

- Community outreach to increase engagement with legal pro bono
- Brokerage, matching services and signposting to potential delivery partners

MEDIUM-TERM OUTCOMES

6. **Individuals feel increasingly valued as imbalances of power are reduced through access to legal professionals**
7. Individuals are more empowered to advocate for their rights and interests
8. Individuals increasingly pursue their rights
9. Individuals are more able to deal with legal issues
10. Individuals have increased trust in lawyers and the legal system

SHORT-TERM OUTCOMES

1. **Individuals have increased access to legal support which would otherwise be unavailable to them**
2. **Individuals have access to legal support which meets their needs which would otherwise be unavailable to them**
3. **Individuals have improved understanding, e.g. of their rights, legal system and processes, and the role of the law in day-to-day life**
4. **Individuals have more understanding of how to access the legal support they need**
5. **Individuals have more confidence to access legal support**

LONGER-TERM OUTCOMES

11. More individuals achieve resolutions for their legal issue (through access to free legal support which would otherwise be unavailable to them)
12. Individuals have increased security and economic resilience

LONG-TERM OUTCOMES

- L1. People and communities have improved quality of life
- L2. People and communities have improved wellbeing
- L3. The law and its application are more equitable, fair and consistent
- L4. The public have increased trust in the justice system

IMPACT ↓

Society is more just, equal and inclusive

Bold text indicates an outcome which is created by legal pro bono as distinct from other forms of free legal support

ADD YOUR ASSUMPTIONS HERE



Access this chart via [Canva](#) and adapt it to your own needs by copying it to your own document.

Outcomes and indicators

As touched upon in our toolkit overview, you should measure progress towards the outcomes set out in your theory of change by using through **indicators** and an appropriate method of **data collection**.

In the following table, we include examples of indicators you can use to measure progress towards the outcomes included in this model, as well as suggestions of different potential options for collecting data.

You can use as many or as few of these as you like. You can adapt them to fit your service and capacity, or you can develop your own from scratch.

ToC ref.	Outcome	Indicator(s)	Data collection tools/methods
2	Individuals have access to legal support which meets their needs, which would otherwise be unavailable to them.	Numbers of clients accessing legal support where they could not before	Registration data or case notes
3	Individuals have improved knowledge, e.g., of their rights, legal system and processes, and the role of the law in day-to-day life.	What your organisation delivers to create change in the world, such as services (e.g. providing advice or legal support, training, campaigning and influencing work), or research and the resulting reports	Surveys or interviews
11	More individuals achieve resolutions to their legal issues through access to free legal support that would otherwise be unavailable to them.	<p>The real-world changes you create through your activities – changes for people, groups, organisations or wider society, or for things like the environment or justice system.</p> <hr/> <p>Examples of resolution, e.g. case concluded; client decided not to pursue, no of appeals submitted, etc.</p>	<ul style="list-style-type: none"> ▪ Spreadsheets or databases ▪ Case notes <hr/> <ul style="list-style-type: none"> ▪ Case notes ▪ Surveys or interviews

ToC ref.	Outcome	Indicator(s)	Data collection tools/methods
L1 (quality of life)	Individuals have improved quality of life (as a result of their legal issues being resolved)	Whether there are any benefits to the client as a result of case resolution, e.g.: <ul style="list-style-type: none"> ▪ Retained their home ▪ Compensation awarded ▪ Benefits awarded/ retained/ increased ▪ Client sentence reduced/ not convicted/ not prosecuted Etc.	<ul style="list-style-type: none"> ▪ Spreadsheets or databases ▪ Case notes ▪ Surveys or interviews
		Whether the client reports any quality-of-life improvement as a result of the resolution, e.g.: <ul style="list-style-type: none"> ▪ Reduced stress ▪ Increased sense of security ▪ Improved financial situation ▪ Improved ability to move on from the situation 	Surveys or interviews
L2 (well-being)	People have improved well-being (as a result of engaging with pro bono services)	Whether or not the client believes their wellbeing has improved as a result of engaging with legal pro bono support	Surveys or interviews

Example survey: Client work for individuals

To collect data, you could ask clients a short set of questions focusing on satisfaction, outcomes and 'what next'. We have included some example questions below. You can find more general advice on writing surveys – in particular introductions and profile questions – in a dedicated part of this toolkit.

Section 1: Introduction

Section 2: Your experience of the service

You should include a limited number of questions on satisfaction. Here are three examples of what they might include.

1. How satisfied or dissatisfied were you with the following aspects of our work?

Response options:

- Very satisfied
- Satisfied
- Neutral
- Dissatisfied
- Very dissatisfied
- Not applicable

Statements:

- The staff member who supported you
- Feeling listened to and taken seriously
- The advice or support you received
- How accessible the service was (e.g., timing, format, communication)

2. How likely are you to recommend our legal services to someone who needs legal help or advice?

Use the same satisfaction scale as above OR 0 to 10, where 0 is not at all likely and 10 is extremely likely (this is the net promoter score, widely used for this type of question)

3. Is there more that you would like to share about your responses to this section? [Comment box]

Section 3: What has happened with your legal issue

What was the outcome of your case, or its current status if it is still ongoing? [Open response]

Example responses:

- Case resolved
- Referred or signposted to another service
- Formal action taken (e.g., appeal, complaint, enforcement step)
- Ongoing / awaiting response

Section 4: What has changed as a result of the support

Thinking about your situation when you first contacted us, and how things are now, how far do you agree or disagree with the following statements?

Response options:

- Strongly agree
- Agree
- Neutral
- Disagree
- Strongly disagree
- Not applicable

Statements:

- I have a better understanding of my legal rights or position.
- I feel more confident dealing with this issue.
- I feel more confident dealing with similar legal issues in the future.
- My situation has improved as a result of the support.
- My overall well-being has improved.

Optional additional statements:

- I know more about my legal options.
- I have a better understanding of the legal system.
- I better understand legal processes/ the role of the law in day-to-day life.
- My housing/employment / financial situation has improved.

Section 5: Final reflections and improvement

What, if anything, made the biggest difference to you? [Comment box]

Do you have any suggestions for how we could improve our service, or any other comments? [Comment box]



Model 2: Client work for organisations

This model is intended for an organisation which primarily supports charities, social enterprises or community groups with matters including legal advice, casework and governance.

—
OUTCOMES AND INDICATORS

ACTIVITY INDICATORS

EXAMPLE SURVEY

LEGAL PRO BONO ACTIVITIES

Legal pro bono support to organisations, i.e. community groups and charities:

- Legal advice
- Legal casework, representation and litigation
- Referrals and signposting to other legal services and support

ENABLING ACTIVITIES ↑

- Community outreach to increase engagement with legal pro bono
- Brokerage, matching services and signposting to potential delivery partners

MEDIUM-TERM OUTCOMES

6. **Community groups and charities feel increasingly valued as imbalances of power are reduced through access to legal professionals**
7. Community groups and charities are more empowered to advocate for their rights and interests
8. Community groups and charities increasingly pursue their rights
9. Community groups and charities are more able to deal with legal issues
10. Community groups and charities have increased trust in lawyers and the legal system

SHORT-TERM OUTCOMES

1. **Community groups and charities have increased access to legal support which may otherwise be unavailable to them**
2. **Community groups and charities have access to legal support which meets their needs which may otherwise be unavailable to them**
3. **People working in community groups and charities have improved knowledge, e.g. of rights, the legal system and processes, and the role of the law in day-to-day life**
4. **People working with community groups and charities have more understanding of how to access the legal support they need**
5. **People working with community groups and charities have more confidence to access the legal support their organisation needs**

LONGER-TERM OUTCOMES

11. **More community groups and charities achieve resolutions for their legal issues**
12. **Community groups and charities have improved capacity and/or capability**
13. **Community groups and charities work more effectively in line with their mission**
14. Community groups and charities have increased security and economic resilience

LONG-TERM OUTCOMES

- L1. People and communities have improved quality of life
- L2. People and communities have improved wellbeing
- L3. The law and its application are more equitable, fair and consistent
- L4. The public have increased trust in the justice system
- L5. Civil society is more resilient

IMPACT ↓

Society is more just, equal and inclusive

Bold text indicates an outcome which is created by legal pro bono as distinct from other forms of free legal support

ADD YOUR ASSUMPTIONS HERE

Access this chart via [Canva](#) and adapt it to your own needs by copying it to your own document.



Outcomes and indicators

As touched upon in our toolkit overview, you should measure progress towards the outcomes set out in your theory of change by using through **indicators** and an appropriate method of **data collection**.

In the following table, we include examples of indicators you can use to measure progress towards the outcomes included in this model, as well as suggestions of different potential options for collecting data.

You can use as many or as few of these as you like. You can adapt them to fit your service and capacity, or you can develop your own from scratch.

ToC ref.	Outcome	Indicator(s)	Potential data collection tools and activities
2	Community groups and charities have increased access to legal support, which may otherwise be unavailable to them	Number of organisations accessing legal support (where they could not access before)	Registration or data from spreadsheets or databases
3	People working in community groups and charities have improved knowledge, e.g., of rights, the legal system and processes, and the role of the law in day-to-day life	Extent to which people working for communities and charities believe their knowledge has improved in the areas of: <ul style="list-style-type: none"> ▪ rights ▪ legal system ▪ legal processes (delete as appropriate)	Surveys or interviews
11	More individuals, community groups and charities achieve resolutions for their legal issues	Number or % of individuals, community groups and charities achieving resolutions (regardless of outcome) Examples of resolution, e.g. case concluded; client decided not to pursue, no of appeals submitted, etc.	<ul style="list-style-type: none"> ▪ Spreadsheets or databases ▪ Case notes <hr/> <ul style="list-style-type: none"> ▪ Case notes ▪ Surveys or interviews

ToC ref.	Outcome	Indicator(s)	Potential data collection tools and activities
12	Community groups and charities have improved capacity and/ or capability	Whether or not the client improved their capacity	Surveys or interviews
		What the people working in the community group or charity say about improvements to their capability	Surveys or interviews
		What the people working in the community group or charity say about improvements to organisational capability	Surveys or interviews
13	Community groups and charities work more effectively in line with their mission	Whether or not people working in community groups and charities feel the organisation is better able to achieve outcomes and impact in line with their mission	Surveys or interviews

Activity indicators

You can also use indicators to measure your activities as well as outcomes. The table below identifies activity indicators and suggests different methods to support data collection. As above, these are examples. Feel free to use as many or as few as you like and to adapt them to fit your service and capacity.

Activity	Indicator(s)	Data collection tools/ methods
Legal support activities, including: <ul style="list-style-type: none"> ▪ Advice ▪ Casework ▪ Brokerage and matching services 	<ul style="list-style-type: none"> ▪ Profile of community group/ charity seeking support, or profile of learners ▪ Profile of lawyer(s) or non-lawyers providing the service 	<ul style="list-style-type: none"> ▪ Spreadsheets or databases ▪ Surveys or interviews
Legal advice and casework	<ul style="list-style-type: none"> ▪ Number of community groups/ charities using the service and how often ▪ Type of service, e.g., advice clinic/ legal consultation/ casework/ representation, etc. ▪ Length of engagement with client ▪ Method of delivery (e.g., face-to-face/ online) ▪ Number of legal sector partners, e.g., legal professionals, law firms and chambers ▪ Number of non-lawyer specialist partners, e.g., legal professionals, law firms and chambers <hr/> Legal issue presented by community group/ charity	Spreadsheets or databases <ul style="list-style-type: none"> ▪ Spreadsheets or databases ▪ Surveys or interviews
Referrals/ signposting to other legal services and support	<ul style="list-style-type: none"> ▪ Number of referrals/ service users signposted ▪ Profile of organisations/ services referred/ signposted to 	Spreadsheets or databases
Community outreach to increase engagement with legal pro bono	Type of outreach	Spreadsheets or databases
Legal education for the public (e.g., legal literacy projects or workshops, citizenship work)	<ul style="list-style-type: none"> ▪ Topic of legal education ▪ Number of times delivered, length of training ▪ Method of delivery (e.g., face-to-face/ online) ▪ Number of learners ▪ Number and type of resources shared and produced 	Spreadsheets or databases
Client feedback: helping you to understand client satisfaction with different aspects of service delivery and quality	Level of client satisfaction	Surveys or interviews

Example survey: Client work for organisations

To collect data, you could ask clients a short set of questions focusing on satisfaction and outcomes. We have included some example questions below.

You can find more general advice on writing surveys – in particular introductions and profile questions (which may not be relevant for organisations) – in a dedicated part of this toolkit.

Section 1: Introduction

Section 2: Your experience of the service

You should include a limited number of questions on satisfaction. Here are three examples of what they might include.

1. How satisfied or dissatisfied were you with the following aspects of our work?

<u>Response options:</u>	<ul style="list-style-type: none"> ▪ Very satisfied ▪ Satisfied ▪ Neutral 	<ul style="list-style-type: none"> ▪ Dissatisfied ▪ Very dissatisfied ▪ Not applicable 	<u>Statements:</u>	<ul style="list-style-type: none"> ▪ The staff member who supported you ▪ The advice or support you received ▪ How accessible the service was (e.g., timing, format, communication)
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2. How likely are you to recommend our legal services to someone who needs legal help or advice?

Use the same satisfaction scale as above OR 0 to 10, where 0 is not at all likely and 10 is extremely likely (this is the [net promoter score](#), widely used for this type of question)

3. Is there more that you would like to share about your responses to this section? [Comment box]

Section 3: What has changed as a result of the support

What difference, if any, did the legal support make to your organisation?

<u>Response options:</u>	<ul style="list-style-type: none"> ▪ Strongly agree ▪ Agree ▪ Neutral 	<ul style="list-style-type: none"> ▪ Disagree ▪ Strongly disagree ▪ Not applicable 	<u>Statements:</u>	<ul style="list-style-type: none"> ▪ We saved money. ▪ We saved staff time. ▪ Our staff stress levels were reduced. 	<ul style="list-style-type: none"> ▪ We were more able to focus on making a difference/ our operations.
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Section 3: What has changed as a result of the support (cont'd.)

FOR CHARITY STAFF: Please tell us about the difference working with pro bono partners has made to your knowledge in different areas of your work

- Statements:
- I know more about the rights of clients.
 - I know more about legal processes.
 - I know more about the legal options available to clients.
 - I know more about other sources of support available to clients.

Please tell us about the difference working with pro bono partners has made to your skills and experience.

- Statements:
- I gained skills and experience in an area of law which was new to me.
 - I gained skills and experience in an area of law I want to pursue in my future career.
 - I gained skills and experience in an area of law I was less familiar with.
 - I gained skills and experience in working with clients.

How, if at all, has working with our pro bono partners affected your confidence to deal with the legal issues of our clients?

- Response options:
- Much more confident
 - No change
 - Much less confident
 - More confident
 - Less confident
 - I don't know/ prefer not to say

Statements related to organisational confidence and capability:

- Our organisation has a clearer understanding of its legal position as a result of the support.
- Our organisation feels more confident dealing with similar legal issues in the future.
- The legal support helped us make more informed decisions.

Statements related to organisational resilience:

- The legal support helped our organisation better manage or reduce legal risks.
- Our organisation feels better prepared to respond to legal challenges in the

Statements related to organisational sustainability:

- The pro bono support helped our organisation remain stable and focused on its mission.
- Access to pro bono support helped prevent issues from escalating into more serious problems.

If relevant, please tell us more about how the pro bono support affected your organisation. [Comment box]

Section 4: Final reflections and improvement

What, if anything, made the biggest difference to you? [Comment box]

Do you have any suggestions for how we could improve our service, or any other comments? [Comment box]



Model 3: Collaboration with pro bono lawyers

This model is intended for pro bono charities that work with legal sector professionals, and is best suited to exploring the impact on pro bono charities as a result of working with pro bono lawyers, including on capacity and sustainability.

OUTCOMES AND INDICATORS

ACTIVITY INDICATORS

LEGAL SECTOR ACTIVITIES

Activities supporting legal pro bono work:

- Volunteering (lawyers and non-lawyers)
- Assistance in co-ordinating and managing pro bono projects and legal professionals
- Casework mentoring and coaching for volunteer lawyers and non-lawyers

Activities supporting pro bono charity operations:

- Legal training
- Special projects
- Financial support
- Support for fundraising
- Advice and training on compliance and best practice
- Mentoring for individuals

SHORT-TERM OUTCOMES

1. **Pro bono charities have increased capacity to provide legal support which meets the needs of the priority individuals, groups and causes**
2. **Legal skills – including specialist and uncommon skills – are more widely available to charities and their clients**
3. Charities have improved relationships and links with the legal sector
4. People working in pro bono charities have increased knowledge and skills
5. Pro bono charities have improved capacity and capability to run their organisation
6. Charities and the legal sector work more closely together sharing approaches and refining models

LONG-TERM OUTCOMES

- L1. People and communities have improved quality of life
- L2. People and communities have improved wellbeing
- L3. The law and its application are more equitable, fair and consistent
- L4. The public have increased trust in the justice system
- L5. Civil society is more resilient

IMPACT ↓

Society is more just, equal and inclusive

Bold text indicates an outcome which is created by legal pro bono as distinct from other forms of free legal support

MEDIUM-TERM OUTCOMES

7. **The quality and breadth of legal pro bono services provided by charities is improved**
8. **Charities and the people who work in them have increased trust in lawyers and the legal system**
9. Pro bono charities are more effective
10. Pro bono charities are more sustainable

LONGER-TERM OUTCOMES

1. **Pro bono charities are better able to support high priority/under-served individuals, communities and causes**
2. **Pro bono charities are better able to achieve outcomes and impact in line with their mission**
3. Public trust in charities increases

ADD YOUR ASSUMPTIONS HERE



Access this chart via [Canva](#) and adapt it to your own needs by copying it to your own document.

Outcomes and indicators

As touched upon in our toolkit overview, you should measure progress towards the outcomes set out in your theory of change by using through **indicators** and an appropriate method of **data collection**.

In the following table, we include examples of indicators you can use to measure progress towards the outcomes included in this model, as well as suggestions of different potential options for collecting data.

You can use as many or as few of these as you like. You can adapt them to fit your service and capacity, or you can develop your own from scratch.

ToC ref.	Outcome	Indicator(s)	Data collection tools/methods
1	Pro bono charities have increased capacity to provide legal services which meet the needs of priority individuals, groups and causes	<ul style="list-style-type: none"> ▪ The extent to which the donation of pro bono hours enabled the charity to provide legal services. ▪ The extent to which the needs of population(s) / target groups were served as a result of pro bono services. 	Comparison of service delivery and client profile data over time (before and after pro bono support)
2	Legal skills are more widely available to charities and their clients	The profile of the volunteers you work with/ the type of legal skills available to support your client work	<ul style="list-style-type: none"> ▪ Surveys ▪ Spreadsheets or databases
9	Pro bono charities are more effective	<ul style="list-style-type: none"> ▪ The extent to which the organisation improved aspects of its delivery and operations ▪ The extent to which staff knowledge improved as a result of engaging with pro bono partner(s) 	Surveys or interviews
10	Pro bono charities are more sustainable	The extent to which support from the legal sector maintained/ improved sustainability.	Surveys or interviews

Activity indicators

You can also use indicators to measure your activities as well as outcomes. The table below identifies activity indicators and suggests different methods to support data collection. As above, these are examples. Feel free to use as many or as few as you like and to adapt them to fit your service and capacity.

Activity (preceded by theory of change reference)	Indicator(s)	Data collection tools/methods
All activities	<ul style="list-style-type: none"> ▪ Number of pro bono lawyers ▪ Number of hours dedicated by pro bono lawyers ▪ Financial value of hours dedicated by pro bono lawyers 	Spreadsheets or databases
	Profile of pro bono lawyer, e.g. career level/ job role/ specialist skills	Questionnaire
Advice and training	<ul style="list-style-type: none"> ▪ Topic of advice/ training ▪ Number of training sessions 	Spreadsheets or databases
Financial support	Number, value and purpose of donations	Spreadsheets or databases
Other support	Other types of support provided to the charity, e.g. project management support, mentoring, etc.	Spreadsheets or databases



Model 4: Legal sector pro bono work

This model is intended for the legal sector, including volunteers, law firms and chambers. It is best suited to measuring outcomes for volunteers and/or legal sector organisations participating in pro bono, for example on skills and motivation.

OUTCOMES AND INDICATORS

- For people working in the legal sector
- For legal sector organisations

ACTIVITY INDICATORS

EXAMPLE PRO BONO LAWYER QUESTIONNAIRE

LEGAL SECTOR ACTIVITIES

Activities supporting legal pro bono work:

- Volunteering (lawyers and non-lawyers)
- Assistance in co-ordinating and managing pro bono projects and legal professionals
- Casework mentoring and coaching for volunteer lawyers and non-lawyers

Activities supporting pro bono charity operations:

- Legal training
- Special projects
- Financial support
- Support for fundraising
- Advice and training on compliance and best practice
- Mentoring for individuals

MEDIUM-TERM OUTCOMES

4. **Lawyers, law firms and chambers become increasingly motivated and committed to public service and philanthropy**
5. **Firms and chambers increasingly value the skills and experience which pro bono develops**
6. **Lawyers and others working in the legal system have a stronger foundation to build their profile and careers**

SHORT-TERM OUTCOMES

1. **Lawyers and others working in the legal system have increased understanding of societal inequalities and the lived experience of clients**
2. **Lawyers and others working in the legal system have an increased sense of fulfilment and wellbeing through supporting those in most need**
3. **Lawyers and others working in the legal system develop more skills and experience**

LONGER-TERM OUTCOMES

7. **The culture of providing pro bono becomes increasingly embedded in the legal sector**
8. **Lawyers and others working in the legal system choose to dedicate more time and resources to pro bono work**
9. **Law firms and chambers dedicate more time and resources to pro bono work as part of their business planning**
10. **Law firms and chambers reduce barriers for lawyers who want to deliver pro bono**
11. **Charities receive more skills, resources and funding from the legal profession**
12. **Lawyers, law firms and chambers increase their positive contribution and interconnectivity within society**

LONG-TERM OUTCOMES

- L1. People and communities have improved quality of life
- L2. People and communities have improved wellbeing
- L3. The law and its application are more equitable, fair and consistent
- L4. The public have increased trust in the justice system
- L5. Civil society is more resilient

IMPACT ↓

Society is more just, equal and inclusive

Bold text indicates an outcome which is created by legal pro bono as distinct from other forms of free legal support

ADD YOUR ASSUMPTIONS HERE

Access this chart via [Canva](#) and adapt it to your own needs by copying it to your own document.



Outcomes and indicators

As touched upon in our toolkit overview, you should measure progress towards the outcomes set out in your theory of change by using through **indicators** and an appropriate method of **data collection**.

In the following tables, we include examples of indicators you can use to measure progress towards the outcomes included in this model, as well as suggestions of different potential options for collecting data.

You can use as many or as few of these as you like. You can adapt them to fit your service and capacity, or you can develop your own from scratch.

Measurement of outcomes for people working in the legal sector through delivering pro bono

ToC ref.	Outcome (preceded by theory of change reference)	Indicator(s)	Data collection tools/methods
1	Lawyers and others working in the legal system have increased understanding of societal inequalities and the lived experience of clients	Extent to which volunteers feel their understanding of societal inequalities/ issues within the justice system have increased	Surveys or interviews
3	Lawyers and others working in the legal system develop more skills and experience	<ul style="list-style-type: none"> ▪ Whether or not volunteers increased their experience in a new/ less familiar area of law ▪ Extent (self-reported) to which volunteers developed new skills (wider legal career/ within pro bono sector) 	Surveys or interviews
4	Lawyers become increasingly motivated and committed to public service and philanthropy	<ul style="list-style-type: none"> ▪ Extent to which the volunteer feels motivated to do future pro bono work ▪ Whether or not the volunteer would recommend pro bono work to colleagues 	Surveys or interviews

Measurement of outcomes for legal sector organisations through delivering pro bono

ToC ref.	Outcome (preceded by theory of change reference)	Indicator(s)	Potential data collection tools and activities
4	Law firms and chambers become increasingly motivated and committed to public service and philanthropy	<p>Extent to which law firms and chambers communicate about pro bono</p> <ul style="list-style-type: none"> ▪ Type and frequency of recognition of lawyers and non-lawyers volunteering (pro bono) ▪ Level of staff engagement in pro bono 	<ul style="list-style-type: none"> ▪ Survey/ interview ▪ Review of partner organisation external communications <p>Survey/ interview</p>
9	Law firms and chambers dedicate more time and resources to pro bono work as part of their business plan - culture of pro bono	<p>Whether or not law firms/ chambers maintain or increase volunteer hours to support pro bono/ pro bono charities</p> <ul style="list-style-type: none"> ▪ Extent to which law firms/ chambers reduce barriers to volunteering ▪ Type and frequency of senior-level support and backing for pro bono ▪ Extent to which pro bono features in organisation plans ▪ Whether or not law firms/ chambers expand the remit of their pro bono work, e.g., policy influencing, campaigns 	<ul style="list-style-type: none"> ▪ Survey/ interview ▪ Database (e.g., Excel or other system) <p>Survey/ interview</p>

Activity indicators

You can also use indicators to measure your activities as well as outcomes. The table below identifies potential activity indicators for pro bono undertaken by professionals/ organisations in the legal system and suggests appropriate data collection methods for each. As above, these are examples. Feel free to use as many or as few as you like and to adapt them to fit your service and capacity.

Measurement of activities for people working in the legal sector through delivering pro bono

Activity	Indicator(s)	Potential data collection tools/ methods
All pro bono activities	<ul style="list-style-type: none"> ▪ Profile of lawyer(s) and non-lawyers providing the service ▪ Number of legal sector partners, e.g., legal professionals, law firms and chambers ▪ Topic of advice/ casework ▪ Type of service, e.g., advice clinic/ legal consultation/ casework/ representation, etc. ▪ Number of occasions the service was provided ▪ Length of engagement with client 	Spreadsheets or databases
Volunteer feedback: helping you to understand volunteer satisfaction with different aspects of partnership working	Level of volunteer satisfaction	Surveys or interviews
Organisation feedback: helping you to understand organisation satisfaction with different aspects of partnership working	Level of legal sector partner satisfaction	Surveys or interviews

Example pro bono lawyer questionnaire

This is an example of some questions which you could use to explore the experience and any outcomes for pro bono lawyers. If the lawyer comes to you to offer one-off support, you could do it once their case is concluding, or you might prefer to do these every six months – it depends on the cycles of your work. All questions are optional and should be updated to reflect your service.

You can find more general advice on writing surveys – in particular introductions and profile questions – in a dedicated part of this toolkit.

Section 1: Introduction

Section 2: Skills, experience and understanding

Please tell us how far you agree or disagree with the following statements about your experience of volunteering with us.

Statements:

- I developed skills or experience in an area of law that was new to me.
- I developed skills or experience in an area of law I was less familiar with.
- Volunteering supported my future career development.
- I developed skills or confidence in working with clients.
- I have a better understanding of social inequalities as a result of my pro bono work.
- I have a better understanding of issues within the justice system.

Scale (used throughout this section):

- Strongly agree
- Agree
- Neutral or neither agree nor disagree
- Disagree
- Strongly disagree
- I do not know / prefer not to say

Please use this space to tell us anything else about how volunteering has affected your skills, experience or understanding. [Comment box]

Section 3: How volunteering has influenced your future intentions

Please tell us how far you agree or disagree with the following statements.

Statements:

- Volunteering has motivated me to do more pro bono work in the future
- Volunteering has increased my interest in being involved in the charity sector
- I am likely to take on further pro bono opportunities

Scale as above

What was the outcome of your case, or its current status if it is still ongoing? [Comment box]

Section 4: Your overall experience of volunteering with us

How likely are you to recommend volunteering with our charity to a friend or colleague?

0 = Not at all likely

10 = Extremely likely

[0 1 2 3 4 5 6 7 8 9 10]

Please tell us the main reason for your score, if you would like. [Comment box]

Section 5: Improving our services

Do you have any suggestions for how we could improve: [Comment box]

- the volunteer experience?
- our legal pro bono services for clients?



Model 5: Policy influencing

This model is intended for policy influencing. It is best suited to pro bono which contributes to policy, practice, or systems change, for example through evidence, stakeholder engagement or strategic litigation.

OUTCOMES AND INDICATORS

- To create change in the justice system
- To create change in line with the needs and interests of clients

ACTIVITY INDICATORS

POLICY INFLUENCING

- Charity insights and data enabled by delivering legal pro bono.
- Research and data sharing by the legal sector.



1. There is more evidence about need, impact on people and communities, and the underlying systemic issues affecting access to rights and justice
2. Charities and other stakeholders are more able to advocate for change to address injustices and inequalities
3. Charities and the legal sector are able to work more effectively for systemic change

MEDIUM-TERM OUTCOMES

7. Policy and decision-makers become more committed to reform in the justice system
8. Policy and decision-makers are more committed to reform around causes aligned to client needs and interests

SHORT-TERM OUTCOMES

4. Stakeholders have more understanding of inequalities, issues in the justice system, barriers to accessing justice and the lived experience of those affected by them
5. Stakeholders have more understanding of the causes and impact of injustices in line with client needs and interests
6. Policy and decision-makers and influencers increase engagement with the issues

LONGER-TERM OUTCOMES

9. Policy and decision-makers take action to improve laws, policies and legal frameworks to improve access to justice
10. The need for pro bono reduces because barriers to accessing justice are reduced
11. Policy and decision-makers take action to improve policy, practice and regulation around causes aligned with client needs and interests

LONG-TERM OUTCOMES

- L1. People and communities have improved quality of life
- L2. People and communities have improved wellbeing
- L3. The law and its application are more equitable, fair and consistent
- L4. The public have increased trust in the justice system
- L5. Civil society is more resilient

IMPACT ↓

Society is more just, equal and inclusive

Bold text indicates an outcome which is created by legal pro bono as distinct from other forms of free legal support

ADD YOUR ASSUMPTIONS HERE



Access this chart via [Canva](#) and adapt it to your own needs by copying it to your own document.

Outcomes and indicators

As touched upon in our toolkit overview, you should measure progress towards the outcomes set out in your theory of change by using through **indicators** and an appropriate method of **data collection**.

In the following table, we include examples of indicators you can use to measure progress towards the outcomes included in this model, as well as suggestions of different potential options for collecting data.

You can use as many or as few of these as you like. You can adapt them to fit your service and capacity, or you can develop your own from scratch.

Outcome measurement of policy influencing work to create change in the justice system

ToC ref.	Outcome (preceded by theory of change reference)	Indicator(s)	Data collection tools/methods
4	Stakeholders have more understanding of: <ul style="list-style-type: none"> ▪ issues in the justice system ▪ barriers to accessing justice ▪ the lived experience of those affected by them 	What decision-makers and influencers say about barriers to accessing justice and whether their knowledge has changed	<ul style="list-style-type: none"> ▪ Media mentions ▪ Interviews ▪ Feedback forms
6	Policy and decision-makers increase engagement with the issues in the justice system	Number and types of engagement, e.g. references to the legal pro bono charity's work in the media/ parliament/ research/ analysis of academia/think tanks/ commentary	<ul style="list-style-type: none"> ▪ Public records ▪ Observation ▪ Social media mentions
9	Policy and decision-makers take action to improve laws, policies and legal frameworks to improve access to justice	Whether or not the government changes policy and guidance in line with recommendations <ul style="list-style-type: none"> ▪ Number and type of policy changes ▪ Number of case resolutions in the justice system line policy changes 	<ul style="list-style-type: none"> ▪ Analysis of national policy and guidance ▪ Tracking feedback about campaign influence ▪ Observation ▪ Public records

Outcome measurement of policy influencing work to create change in line with the needs and interests of clients

ToC ref.	Outcome (preceded by theory of change reference)	Indicator(s)	Data collection tools/methods
5	Stakeholders have a better understanding of the causes and impact of injustices in line with client needs and interests	What decision-makers and influencers say about the issues	<ul style="list-style-type: none"> ▪ Media mentions ▪ Interviews ▪ Feedback forms
6	Policy and decision-makers increase engagement with the issues	Numbers and types of engagement, e.g. references to or attributable pieces to the legal pro bono charity's work in the media/ parliament/ research/ analysis of academia/think tanks/ commentary	<ul style="list-style-type: none"> ▪ Record keeping ▪ Observation
		Level of alignment around the issues between policy/ decision-makers/ influencers and the campaign	<ul style="list-style-type: none"> ▪ Interviews ▪ Feedback forms ▪ Public record ▪ Observation ▪ Social media/media mentions
11	Policy and decision-makers take action to improve policy, practice and regulation around causes aligned with client needs and interests	Whether or not the government changes national policy and guidance in line with campaign recommendations	<ul style="list-style-type: none"> ▪ Analysis of national policy and guidance ▪ Tracking feedback about campaign influence
		Number and type of policy changes	<ul style="list-style-type: none"> ▪ Observation ▪ Public record

Activity indicators

You can also use indicators to measure your activities as well as outcomes. The table below identifies potential activity indicators suggesting appropriate data collection methods for each. As above, these are examples. Feel free to use as many or as few as you like and to adapt them to fit your service and capacity.

Activity	Indicator(s)	Potential data collection tools and activities
Research	<ul style="list-style-type: none"> ▪ Topic of research ▪ Contributors ▪ Type of research output ▪ Methods for research output dissemination 	<ul style="list-style-type: none"> ▪ Record keeping ▪ Spreadsheets or databases
	<ul style="list-style-type: none"> ▪ Number of meetings/ focus groups/ roundtables ▪ Topic of meeting/ working group/ roundtable ▪ Topic of presentations at conferences and events ▪ Number of conferences/ events attended ▪ Profile of conference/ event ▪ Number of presentations at conferences and events 	<ul style="list-style-type: none"> ▪ Record keeping ▪ Spreadsheets or databases
	Profile of people/ orgs attending meetings/ focus groups/ roundtables	Questionnaire
	Number of articles/ stories disseminated	<ul style="list-style-type: none"> ▪ Record keeping ▪ Spreadsheets or databases
Media engagement	Topic of article/ story	Observation
	Profile of the organisation disseminated to	Record keeping
	<ul style="list-style-type: none"> ▪ Number of social media posts ▪ Topic of social media posts 	Social media monitoring
Social media	Number of views/ downloads	Online analytics

Impact reporting

Impact reports are one of the most common ways an organisation like yours will share their impact. However, you can also use other media including presentations, video, web pages, case studies or an impact dashboard.

In this resource, we include a template for a basic impact report. You can access an example, based on a real-world project by our pilot organisation University House, on Canva by [clicking here](#).

Optional extras:

- A short case study.
- Additional data tables.
- Methodological detail.

Basic impact report outline

Front page

- Report title
- Organisation name
- Period covered
- Date of publication

Section 1: About this report

- Brief overview of the organisation and the pro bono work covered.
- Purpose of the report (learning, accountability, sharing impact).
- Short reference to the theory of change and the evaluation framework used, for example:

This report is structured around the priorities from our theory of change and evaluation framework...

Section 2: What we delivered

(Activities and reach)

A short, factual section covering:

- Type(s) of pro bono delivered, e.g. advice, casework, representation, referrals.
- Who was supported, e.g. individuals (with profile data), organisations, charities.

Headline numbers:

- ▶ Number of clients or organisations supported.
- ▶ Number of pro bono lawyers involved.
- ▶ Total pro bono hours (if available).

Section 3: What changed

(Outcomes – structured by the framework)

Report against the relevant outcomes only.

Outcomes for clients or organisations

Examples (select as relevant):

- Improved understanding of legal rights or position
- Legal issues progressed or resolved
- Improved confidence, well-being, or organisational capacity

Include:

- 3–5 headline findings
- One short quote or example (optional)

Outcomes for pro bono lawyers

Examples:

- Increased skills or experience
- Greater understanding of access to justice issues
- Increased motivation to continue pro bono work.

Wider or partnership outcomes (if relevant)

Examples:

- Stronger relationships between charities and the legal sector
- Increased organisational confidence or sustainability
- Contribution to wider access to justice or systems change.

Section 4: How do we know?

Brief summary only:

- Data sources used (e.g., surveys, case records, interviews)
- Number and type of responses
- Any important limitations.

Section 5: Learning and reflections

- What worked well
- What was challenging
- What we would do differently next time.

Section 6: What's next?

- How learning will be used to improve future pro bono delivery
- Any planned changes to services, partnerships or evaluation
- A small number of forward-looking priorities.

Case studies

Organisations which work with individual clients can use case studies to gather richer qualitative evidence about outcomes, alongside some of the tools such as the core survey and case records we covered in Model 1 elsewhere in this toolkit.

In this resource, we provide example interview questions and a short write-up template for individual client case studies.

Some points to reflect on

- Consider co-writing the case study with the person. For example, interview them, draft the case study based on their words, then share it back with them to check, edit, or remove anything they wish. You may choose to present the case study in the first person (e.g., “When I first came to Organisation X...”).
- Use your standard GDPR/privacy introduction. Case studies often include more detailed personal experiences, so be clear about how information will be used and stored, and what choices the person has.
- **Suggested privacy wording (adapt to your organisation):**
 - ▶ “Your case study will be written up in a way that removes names and any details that directly identify you.”
 - ▶ “You will have the opportunity to review your case study before it is published or shared, and you can request changes or ask for parts to be removed.”
 - ▶ “We may use the case study write-up and/or anonymised quotes in reports, presentations, or communications.”
 - ▶ “We will never publish anything without taking steps to protect your privacy.”

▶ Take a trauma-informed approach.

Avoid pressuring the person to share sensitive details. Where relevant, offer “if you feel comfortable to share” options, remind them they can skip questions, and signpost to support if the conversation brings up difficult experiences.

Interview questions

Remember that all of these are optional!

Exploring the support you have received and what you thought of it

Can you describe what support you have received from Organisation X, and when?

(Prompt: You can list the types of support on offer. They do not need to comment on all items – only the ones relevant to them.)

What was happening in your life when you first connected with Organisation X? How did you feel when you first approached Organisation X?

(If comfortable to share)

What did you think of this support? How did the Organisation X pro bono volunteer make you feel during this process?

Was there anything you found less helpful, or that you would change?

Exploring any changes in your life or barriers to change

What was the outcome of your case (or its current status if it is still ongoing)?

How did you feel about that outcome? (For example, did it feel fair, like progress, or something else?)

Did Organisation X support help you build any new skills, abilities, or confidence? If so, which ones? Or if not, could you share what your experience was and what made change difficult?

(Prompts: you can list relevant outcomes from your Theory of Change and ask which feel most true for them, i.e., access to legal support which meets their needs, improved knowledge of their rights, the legal system, improved wellbeing, etc.); **anything else not listed here?**

Did you face any challenges or setbacks? How did you resolve these (if you were able to)? Were there any key turning points, moments, or conversations that stand out to you?

Moving forwards

What's next for you?

How else could Organisation X support you moving forward?

Presenting the case study

Template

- Your case study should be no more than one page.
- Consider co-writing and presenting the case study in first-person – include short direct quotes wherever possible.
- Use a light narrative arc: (1) their situation at the start, (2) support, (3) change, any setbacks and how they were overcome, (4) what's next.
- Make the 'distance travelled' clear, even if it's small or ongoing.
- Keep sentences short and human – case studies should read like stories, not reports.

Paragraph 1: Introduction

- Briefly explain the purpose of the case study.
- Position the person's voice (e.g. "This story is co-written with X to reflect their experience in their own words").
- Establish anonymity (e.g. "Names and identifying details have been removed or changed").

Paragraph 2: Background/challenge

- Describe the beneficiary's situation before receiving support – with care! Outline the specific challenges they were facing.
- Add a short quote that captures how they felt at the start.

Paragraph 3: Intervention/support provided

- Briefly describe how the support was delivered (frequency, type of contact, approach).
- Include what the person thought of the support.

Paragraphs 4 and 5: Outcomes/impact

- Consider organising into short, medium and emerging long-term outcomes.
- Add a sub-section like "What this meant for them" where you weave in one or two strong quotes.
- You might also add "unexpected or unintended positive changes" – these often make great stories.

Final paragraph: Conclusion/future outlook

- Summarise the key takeaways from this case.
- Discuss any ongoing support or plans for the beneficiary.
- Add a final quote.
- Optionally, include a short message from your organisation.

Further reading

Storytelling tips: [6 Rules of Great Storytelling \(As Told by Pixar\) | by Brian G. Peters | Medium](#)

Designing a survey

In this resource, we look at how to ‘top and tail’ a survey – in other words, how to write your introduction and profile questions. We also include some guidance on distributing a survey and some of the software options for this.

Introduction

All surveys need to have an introduction which explains, at minimum:

- why the person/organisation is receiving the survey;
- how you will use their data;
- confidentiality statement;
- your contact details;
- your privacy policy.

Here is an example of a survey introduction:

Thank you for taking a few minutes to share your feedback on the legal support you received from [organisation name].

We use this feedback to understand what has worked well, how we can improve, and to demonstrate the impact of our work. Your responses may be used for learning, evaluation and reporting purposes.

The survey is confidential. We will not use your name or personal details in any of the reporting (adapt as needed).

All information will be stored securely and used in line with our privacy policy: [\[link\]](#).

If you have any questions about this form, please contact [\[name/email\]](#).

Profile data

You may wish to include some profile questions at the end of your questionnaire. These can help you understand whether the people responding reflect your wider client group and whether experiences or outcomes differ across groups.

These questions should be optional, and you should make this clear by including wording such as:

The following questions help us understand who has responded to this evaluation and their experience of our service. You do not have to answer these questions.

Some typical examples of profile questions would include:

- age range;
- first part of postcode;
- gender;
- disability.

You can adapt or remove questions depending on what information is appropriate, proportionate and useful for your organisation.

Distribution

Survey data can be collected through a range of media, which typically include (but aren’t limited to):

- face-to-face surveys;
- telephone surveys;
- paper surveys; and
- online surveys.

Online surveys are the most popular way to collect survey data. They benefit from a high response rate compared to other methods, as well as fast response times and lower administrative burden. You can gather and process data efficiently, and some online survey tools offer built-in data analysis and visualisation.

However, you should always be mindful of reaching people with low digital literacy or limited internet access. There can also be costs associated with using online survey tools.

Some popular online survey tools include Microsoft Forms, SurveyMonkey and Google Forms. These platforms all allow survey data to be exported in formats such as an Excel spreadsheet.

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www.nationalprobonocentre.org.uk | admin@nationalprobonocentre.org.uk

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Design by Brenna Adams Baldwin