



Pro Bono

Capital One Pro Bono Services

OVERVIEW

Capital One is on a mission to change banking for good and to help customers succeed by bringing ingenuity, simplicity and humanity to banking as it builds the bank of the future. Through Capital One Pro Bono, our associates support community partners by providing professional services leveraging their job-specific skills. Associates commit their time and expertise so that organizations can serve more beneficiaries, become more efficient, and deliver on their missions more effectively.

2026 RFP PROCESS

Partners may request capacity building pro bono project support through our Request for Proposal (RFP) process. Through the RFP, organizations submit their challenge(s) to be considered for a 2-10 week project with a dedicated Capital One team aligned with their needs. Our RFP opens triannually in January, March, and July:

RFP Open (Cycle 1): January 5th - January 16th

Information Session: Tuesday, January 6th | 12:30 - 1:30 PM ET

RFP Open (Cycle 2): March 30th - April 15th

Information Session: Tuesday, March 31st | 12:30 - 1:30 PM ET

RFP Open (Cycle 3): June 29th - July 15th

Information Session: Tuesday, July 7th | 12:30 - 1:30 PM ET

PROJECT EXECUTION

After organizations submit their applications through our RFP process, projects are reviewed, scoped, and staffed through Capital One practice areas. Below is an estimated timeline of the process once RFPs close:

Application Review	Project Scope	Talent Match	Project Execution
<i>Weeks 1-2</i>	<i>Weeks 3-4</i>	<i>Weeks 5-7</i>	<i>Weeks 8-17</i>
Capital One determines which applications advance to project scoping	Virtual office hour with practice area and org to finalize project scope	Practice areas recruit 3-12 associates to support the project	Projects are executed over 2-10 weeks, depending on scope

QUESTIONS

Please connect with us via email at capitaloneprobono@capitalone.com for any additional questions.

Confidential

Pro Bono Practice Areas: Menu of Services

Brand: How an organization brands itself and communicates its values, services, or impact.

- **Collateral Assessment:** Audit branding or marketing materials or strategies currently in use.
- **Collateral Development:** Create a brand identity (logo, guidelines, value prop) or digital/print marketing materials.
- **Develop a Brand or Social Media Strategy:** Develop value proposition, brand positioning, or social media and content strategy.

Communications: How an organization can lead communication strategy and manage external insights.

- **Communications Strategy:** Overview of modern communications and storytelling approaches and how to build an impactful, outcomes-focused communications program.
- **Media Relations & Media Training:** How to engage with the news media to effectively tell your story through the media and control your narrative.
- **Audience Insights, Measurement & Reporting:** How to build insights-driven communications strategies and how to measure the results of your communications program.
- **Thought Leadership:** How to build a thought leadership program that helps your audience think about key issues, help them toward new insights and solutions, and deepen your engagement with them.

Cybersecurity: How an organization manages cybersecurity risk.

- **Exercises and Workshops:** Design cyber exercises or workshops to educate and inform, as well as to test your plans/policies.
- **Education and Awareness:** Design cyber education and awareness programs like phishing, social engineering, insider threat, etc.
- **Response Plans:** Design cyber security policies such as Incident Response; Business Continuity; etc.
- **Testing:** Application vulnerability assessments, external penetration testing, and wireless security assessment, etc.
- **Strategy, Architecture and Infrastructure:** Cybersecurity strategic review and advice.

Data: How an organization captures, analyzes, and effectively uses information collected.

- **Data Storage:** Advise on how to store data or optimize the existing data store.
- **Data Pipeline:** Review data you collect, how you use it, and provide recommendations on how to build data pipelines to move data.
- **Data Analysis:** Evaluate how to create analytical layers that enable analytics-based strategic planning and effective decision making.
- **Data Visualization:** Advise on how to create a visual representation of data in the form of a chart, infographic, diagram, picture, etc.
- **Predictive Modeling:** Use existing data to try to project future outcomes based on statistics and correlated events. Examples may be regression, decision trees, neural networks, or large simulations.
- **Software & System Consultation:** Consult on how to leverage data software and systems to achieve better outcomes. Explore how to integrate multiple existing or new systems to serve data needs.

Design: How an organization creates & plans services and experiences for those served.

- **Design Thinking Session:** Workshop for creative problem solving.
- **Customer Journey Mapping:** Visual representation of experiences clients have with your organization.
- **Process Mapping:** Planning and management tool that visually depicts the flow of work.
- **Service Design Blueprinting:** Planning and management tool that visually maps the processes, people, and props needed to deliver a service.
- **Review UX/UI Design:** Review of your user experience or user interface design to identify usability issues.

ELA (Translation)*: How an organization translates messaging for diverse audiences.

- **Legal/Financial Translation:** Translation of legal or financial documents your organization uses.
- **Marketing & Communications Translation:** Translation of communications or marketing materials.
- **User Experience/Digital Translation:** Translation of content surrounding user experience within an application, website, etc.
- **Community Outreach Translation:** Translation of messaging to communities your organization serves, such as annual reports, one pagers, etc.

**ELA Pro Bono English-to-Spanish document translation services are not available via the RFP process. Documents are translated on a first-come, first-serve basis, and requests are accepted pending the capacity of our translation team. If you are interested in submitting a Pro Bono translation request, please contact capitaloneprobono@capitalone.com.*

Finance: How an organization plans, manages and maintains accounting and finance records and practices.

- **Financial Education:** Benefits of having a finance plan and how to create one.
- **Financial Planning & Analysis:** Establishing new or improving upon existing financial planning practices to best deliver on organizational strategy.
- **Accounting vs. Finance Management:** Understanding the difference and core elements of both
- **Accounting Practices:** Establishing and maintaining finance and accounting records including balance sheet, income statements, tracking expenses, managing cash flows
- **Finance Management:** setting forecasts and budgets, capital and lending considerations, revenue and pricing strategies
- **Data Analytics:** Identifying and creating opportunities to use data and reporting to deliver business insights

Global Workplace Services: How an organization manages workplaces through building services, physical safety & security.

- **Workspace Design, Construction & Experiences:** Consult on the design, development, and management of workspaces and services.
- **Physical Security Strategy & Threat Prevention:** Consult on physical security programs, building access management and security technology.
- **Corporate Real Estate Transactions Management:** Provide industry expertise to identify space and terms for executing commercial transactions.
- **Facilities Operations & Infrastructure:** Consult on critical infrastructure, maintenance and facility operations.
- **Preparedness & Safety Education:** Advise on methods to provide safe workspaces and response strategies to secure work environments.

HR: How an organization attracts, develops, and retains talent to foster inclusivity.

- **Benefits & Compensation:** Designing and managing total rewards to attract and retain employees, and ensuring equitable compensation.
- **Diversity, Inclusion & Belonging:** Creating a culture where employees feel they can be authentic and are supported by leaders.
- **Learning & Development:** Creating systematic processes to enhance an employee's skills, knowledge, and competencies, resulting in improved performance at work. Empowering employees to own their development.
- **Performance Management:** Measuring and developing the performance of employees based on feedback, metrics, and deliverables.
- **Talent Acquisition:** Identifying and acquiring skilled workers to meet organizational needs (Deliver best in class diverse talent while elevating candidate, business partner, and recruiter experience).
- **HR Policies & Guidelines:** Developing workplace policies about employee conduct, attendance, safety & health.

Legal*: How an organization prevents and handles legal issues.

- **Agreements:** Establishing by-laws, a partnership agreement, or an operation agreement
- **Contracts:** Reviewing contracts with service providers, other nonprofits, or lessors, etc.

- **Disclaimers:** Crafting and using legal disclaimers.
- **Employment:** Understanding employment laws, etc.
- **Intellectual Property:** Registering trademarks, copyrighting materials, obtaining releases or licenses, etc.
- **Mergers and Consolidations:** Understanding collaborations, mergers, joint ventures, etc.
- **Real Estate:** Reviewing commercial or office leases, etc.
- **Risk Management:** Understanding risks your organization may face, etc.
- **Tax Status:** Forming a legal entity (501(c)(3) non-profit entity), understanding state Non-profit statutes, tax exemptions, etc.

**Legal Pro Bono is only available for organizations based in New York, Texas, Virginia, or Washington, DC*

Product: How an organization enables client and business goals through customer research, business analysis, and product development.

- **Product Strategy:** Conduct customer, user, and market research to identify problems/needs. Refine your organization's value proposition and business model. Create executive summary documents and other materials for external parties.
- **Product Design:** Develop product objectives and scope. Create user journeys to visualize customer pain points and opportunities.
- **Product Development:** Create project plans, including milestones, KPIs, and customer value delivered at each stage. Identify ways to start small, testing and learning before scaling to a full product.
- **Product Growth:** Develop product growth and scaling plans, including milestones, KPIs, and other metrics. Create pitch decks and other content for investors and external parties.
- **Process Management:** Propose ways to refine and improve business processes in support of the overall customer experience.
- **Data Science:** Build or improve Machine Learning models in support of team KPIs. Manage experimentation, including model design and analysis.

Project Management: How an organization delivers products and services to market.

- **Delivery of New Initiatives:** Execution plan for new initiatives with defined implementation date.
- **Workflow Management:** Optimize and improve identified workflows to increase output and eliminate repetition.
- **Capacity Building:** Planning, including resources needed, to take the organization to the next stage.
- **Change Management:** Plan the process for guiding organizational change to fruition

Technology: How an organization effectively leverages advanced systems and tech platforms.

- **Skillsets and Expertise:** Back-end Software Engineering, Big Data Processing, CI/CD, Cloud Engineering, Cyber Security, Data Engineering & Analytics, Data Science, DevOps, DevOps with a focus on Cloud/Containerization, Front-end Software Engineering, Full Stack Software Engineering, Machine Learning, Mobile Engineering, Site Reliability Engineering, Software design and development
- **Languages/Frameworks:** .Net, Angular, Bash, Bogie, CSS, Dynamo, ELK, Express, Go, GraphQL, HTML, Java/Spring, JavaScript, JQuery, Kotlin, MemSQL, Obj-C, Python, Ruby, Scala, SQL, Swift, TypeScript
- **Technologies/Services:** Ansible, Artemis, AWS, AWS Cloud Formation, AWS Dynamo, AWS EC2, AWS ECS, AWS Lambda, AWS S3, Azure, Dask, Datadog, DevOps and tech stacks in a cloud native environment (e.g. Jenkins automation server full stack javascript development environment), Docker, EMR, Github, IOS/Android, Jenkins, Kafka, Kubernetes, Lambda, Legoland, Microservices, MongoDB, New Relic, NodeJS, PGAdmin, PostGres DB, PostGreSQL, RAPIDS, React, Salesforce, SDP, ServiceNowSnowflake, Spark, Spring, Surge, Terraform

APPENDIX: FAQs

Does participating in Capital One Pro Bono impact future funding?

No! Our Pro Bono RFP is a separate (simpler) process from our Capital One grant application and in no way impacts our funding relationship. If your organization chooses not to participate at this time, there may be other opportunities to seek Pro Bono support during a future application cycle.

What should I know about the Pro Bono Project application process?

We accept requests for pro bono project support 3 times per year through our Request for Proposal process. During each RFP cycle, we host a one-hour webinar that shares more details on the process, what kinds of pro bono services we currently offer, and the timeline to expect if your request is selected. Applications are submitted through the Capital One Portal and submissions should take organizations ~15 minutes to complete.

What are our responsibilities if we want to submit an application?

A strong collaborative partnership between Capital One and your organization will ensure project success. We ask you to:

- **Identify a primary Point of Contact.** The point of contact will:
 - Be required to attend an initial virtual 1-hour scoping session. The scoping session is facilitated by practice area leads that work with your org to further diagnose need and define a concrete project scope.
 - Secure the attendance of all potential community partner Points of Contact (POCs) for a virtual, 1-hour orientation. The session will cover best practices, roles and responsibilities, should your project be accepted.
 - Onboard the project team to the project with relevant organizational knowledge and collateral necessary for project execution.
 - Regularly partner with the project team via zoom and email over the duration of the project.
 - Complete post-project impact surveys sent from the Capital One Pro Bono program team.
- **Sign Capital One's Letter of Agreement.** We ask that organizations invited to a Pro Bono project with Capital One sign and return our Letter of Agreement via DocuSign prior to project implementation. Note that we are unable to accommodate edits to our Letter of Agreement template.

Does Capital One accept every challenge submitted to the RFP?

Unfortunately not all applications will move to project execution. Applications will either be declined after their initial submission or after their initial 1-hour scoping session should a practice area determine they are unable to scope the project effectively.

Acceptances will be based on available talent and Capital One's ability to support the challenge submitted. The more information you can provide in your application, the better. We prioritize applications based on the following criteria:

- Scope: Is the request well defined? Is there confidence that the request will not change over time?
- Urgency: When does the request need to be addressed? What are the consequences of not meeting relevant deadlines?
- Knowledge Needed: Is the outcome worth the time it will take to provide context to volunteers?
- Staff and Board Readiness: Are your organization's staff and board open to solving the need through pro bono? Do you have the staff time to be engaged on the project?

How Does Capital One Select Partners for Pro Bono?

All Pro Bono engagements are by invite only. Capital One Pro Bono partners with regional grantmakers within the Community Impact and Investment team. Grantmakers “nominate” [Community Benefits Plan](#) aligned community partners in their philanthropic portfolio that have either requested or would generally benefit from pro bono services.

The logic for this is two-fold:

- The program doesn't have capacity to field open call requests for pro bono services at this time, so we prioritize the 2,500+ community partnerships in our existing philanthropic portfolio.
- Grantmakers are able to provide a level of first round "vetting" before an organization even submits their application for pro bono support. When grantmakers nominate an organization, they have already prioritized requests based on the scope, urgency, and organizational readiness tied to the request.

Capital One Pro Bono may invite an organization outside of the Capital One philanthropic footprint should a local impact partner choose to nominate them, but the program will prioritize acceptances based on their alignment with the Community Benefits Plan.