



## ACC CHAPTER PRO BONO RESOURCES

Formal pro bono efforts at ACC chapters are increasingly common and sophisticated. While Corporate Pro Bono (CPBO), the pro bono arm of ACC, has worked with many ACC chapters over the years, the pro bono efforts of ACC chapters have generally developed independent of one another. In order to increase cross-chapter learning and best practices, CPBO has developed a variety of resources for pro bono leaders at ACC chapters and for members in general. Please find enclosed the following resources:

1. Best Practice Profiles of ACC Chapters:
  - a. [Central Ohio Chapter](#)
  - b. [Chicago Chapter](#)
  - c. [Houston Chapter](#)
  - d. [Minnesota Chapter](#)
  - e. [Northeast Chapter](#)
  - f. [San Francisco Bay Chapter](#)
2. Templates for ACC Chapter Websites:
  - a. [ACC Chapter Website Guide – Pro Bono](#)
  - b. [ACC Chapter Website Template – Pro Bono](#)
3. Guides on Important In-House Pro Bono Issues:
  - a. [CPBO Insurance Guide](#)
  - b. [CPBO Multijurisdictional Practice Guide](#)
  - c. [PBI Global Pro Bono Survey](#)
4. Sample Documents:
  - a. [Central Ohio Chapter Member Pro Bono Survey](#)
  - b. [Denver Chapter’s “No Barrier to In-House Pro Bono” Flyer](#)
5. Articles about Replicable Pro Bono Efforts:
  - a. [A Monumental Month for CPBO and ACC Chapters](#)
  - b. [ACC Chapters and Pro Bono](#)
  - c. [Canuck Corporations Embrace Pro Bono](#)
  - d. [Pro Bono Assistance for Young Immigrants](#)
6. Information about CPBO:
  - a. [Who We Are and What We Do](#)
  - b. [Clinic in a Box<sup>®</sup> Programs](#)
  - c. [Ethics Programs](#)

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## IN-HOUSE PRO BONO IN PRACTICE PROFILE: CENTRAL OHIO ACC CHAPTER

May 2015

In three years, the ACC Central Ohio Chapter in Columbus, Ohio has transitioned from hosting a single off-the-shelf clinic to developing an ongoing pro bono project tailored to the specific interests of its members and the needs of the community. After co-hosting a Clinic in a Box<sup>®</sup> program for nonprofits in 2013, pro bono committee co-chair Eric Henricks saw the need and interest to provide continued assistance to nonprofit organizations in Central Ohio. This led to a year-long process, teaming with Barnes & Thornburg, CPBO, and the United Way of Central Ohio, to survey, research, and plan a pro bono effort that resulted in a pro bono nonprofit legal education series for the area's nonprofit organizations.

This series has not only been a positive force for the area's nonprofits, but the ACC Central Ohio Chapter and its volunteers have reaped benefits. According to Henricks, the program "is drawing in some volunteers that may not be as closely involved with the ACC chapter, and allows them to be more closely connected to the chapter. It allows those volunteers to be an expert in a different setting, which supports career growth."

General Program Information	
Pro Bono Contact	Eric Henricks, Co-Chair, Pro Bono Committee Nathan Holschuh, Co-Chair, Pro Bono Committee
Region Served	The ACC Central Ohio Chapter serves Central and Northwest Ohio.
Number of Members	Approximately 450 members
Pro Bono Program History	The ACC Central Ohio Chapter formed its formal pro bono program in 2012. Its first sponsored event was a <b>Clinic in a Box<sup>®</sup></b> program in 2013. Since then, the chapter has expanded its efforts to support an ongoing pro bono nonprofit legal education series.
Pro Bono Leadership Structure	A small committee shares leadership duties for the ACC Central Ohio Chapter's pro bono program.
Pro Bono Policy	The ACC Central Ohio Chapter has no formal policy.
Communications	Opportunities to engage in pro bono are emailed to members. The pro bono committee also conducts personal outreach.
Recognitions/Awards	Though the chapter has not yet publicly recognized volunteers, the committee hopes to implement a system to acknowledge or award participants in the near future.
Tracking Pro Bono	The ACC Central Ohio Chapter tracks the number of sponsored pro bono events and participants.

Partnerships	Partners include the United Way of Central Ohio and Barnes & Thornburg, who work with CPBO to host the pro bono nonprofit legal education series.
Professional Liability	While relying on their partners to provide insurance, the ACC Central Ohio Chapter is actively seeking quotes from insurance carriers in order to purchase its own policy.
<b>Pro Bono Projects</b>	
<i>Pro Bono Nonprofit Legal Education Series</i>	Partnering with the United Way of Central Ohio to serve its member agencies, and with the assistance of CPBO and Barnes & Thornburg, the ACC Central Ohio Chapter held several pro bono nonprofit legal education seminars, beginning in 2014, on specific legal needs, such as hiring and firing, governance, and leases and real estate, and plans to continue with three seminars a year going forward. The seminars start with a presentation about a specific legal topic, and conclude with the opportunity for attendees to obtain brief advice from volunteer lawyers. Four to seven lawyers from the chapter and Barnes & Thornburg staff each seminar.
<b>Lessons Learned</b>	
<i>Pick the right partners.</i>	The ACC Central Ohio Chapter partners with organizations with people equally dedicated and hardworking in support of their collective goals. The pro bono nonprofit legal education series is only possible because of the strengths each partner contributes.
<i>Research the needs and interests of clients and volunteers.</i>	In order to develop a successful pro bono program, the chapter surveyed its members and the United Way of Central Ohio surveyed its member agencies regarding both areas of law and delivery models. Based on the results, the co-hosts were able to tailor a program that meets the needs of the community and utilizes the skills of potential volunteers.
<i>Invest the time necessary to develop a successful project.</i>	The ACC Central Ohio Chapter and its partners spent substantial time determining the specific model to ensure it would deliver value for everyone involved, including volunteers and clients. As a result of detailed surveys and the time spent brainstorming, the partners were able to come up with a less traditional model featuring legal education for nonprofits, focused on relevant legal topics, and delivered in an effective format that provides for the best pairing of volunteers and participants. In addition, the team developed a library of forms to streamline administration of each event.

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## IN-HOUSE PRO BONO IN PRACTICE PROFILE: CHICAGO ACC CHAPTER

*September 2014*

The Chicago Chapter of the Association of Corporate Counsel (ACC Chicago) created its pro bono program in 2010, when it realized that members were eager to volunteer and provide essential pro bono services. Since its inception, the ACC Chicago Pro Bono Committee has been dedicated to achieving its mission to provide opportunities and information related to Chicago area pro bono involvement for in-house counsel. The committee has worked assiduously with partners to provide pro bono opportunities that are substantive yet flexible enough to meet each ACC Chicago member's needs and schedule.

Each of the past four years, ACC Chicago has hosted a **Clinic in a Box<sup>®</sup>** program, which allows pro bono attorneys to conduct a legal audit and provide legal advice to nonprofit organizations. Recently, the Pro Bono Committee has worked to expand its offerings, developing a listserv for those interested in learning more about pro bono opportunities, and coordinating with partner law firms, legal services organizations, and other groups to share resources and expertise. According to Pro Bono Committee Co-Chair Claire Battle, the pro bono program has greatly benefited ACC Chicago as it has allowed members to better connect with one another, with other members of the local legal profession, and with the larger Chicago community.

General Program Information	
Pro Bono Contact	Claire Battle, Co-Chair, Pro Bono Committee Catherine Smith, Co-Chair, Pro Bono Committee
Region Served	ACC Chicago serves Chicago and the surrounding suburbs.
Number of Members	More than 2,000 members
Pro Bono Program History	<p>The ACC Chicago Pro Bono Committee was formed in 2010, when a chapter board member was exploring volunteer opportunities. The board recognized that many members were also looking for ways to become involved in pro bono and would benefit from ACC Chicago providing and/or screening appropriate pro bono opportunities.</p> <p>The Committee's first activity was co-hosting a Clinic in a Box<sup>®</sup> program with CPBO in 2011. Since then, the pro bono program has expanded and the Committee continues to actively fulfill its mission to identify and facilitate legal pro bono service opportunities for its members.</p>
Pro Bono Leadership Structure	The ACC Chicago Pro Bono Committee has historically had one chair that works in conjunction with the board of directors. In 2013, two co-chair positions were created to better meet the needs of the expanding program. The co-chairs share responsibilities for outreach, as well as developing and implementing proposals for

	<p>events. They have periodic conference calls to discuss strategy and ways to connect with members. The Pro Bono Committee now organizes four major events per year, with one co-chair each serving as the point person for two events.</p> <p>Currently, the co-chairs are looking to increase committee membership and provide more pro bono opportunities to members of ACC Chicago. As the program continues to expand, their goal is to have one person in charge of each event and one person dedicated to member outreach and communications. The chapter is also considering having a suburban-based member involved in the Pro Bono Committee in order to be more responsive to the needs of members working outside of the city.</p>
Pro Bono Policy	ACC Chicago does not have a pro bono policy.
Communications	Events are featured on the chapter website and invitations are distributed via email. ACC Chicago also implemented an opt-in listserv for members interested in additional pro bono opportunities beyond those formally sponsored by ACC Chicago.
Recognitions/Awards	ACC Chicago does not formally recognize or provide awards to volunteers at this time.
Tracking Pro Bono	ACC Chicago tracks the number of sponsored events and the number of participants at each event. It does not track other information, such as number of clients served or hours contributed.
Partnerships	<p>ACC Chicago has had multiple successful partnerships. Generally, the chapter partners with at least one legal services provider each year. In 2012, it collaborated with the National Immigration Justice Center and DLA Piper to assist young people who came to the U.S. as children in applying for the Deferred Action for Childhood Arrivals program. In the spring of 2014, ACC Chicago partnered with Morgan Lewis and Lawyers Committee for Better Housing to train volunteers to provide legal counseling to low-income tenants in foreclosed buildings. They have also received support from various law firm sponsors.</p> <p>ACC Chicago is currently looking to expand its partnerships and take advantage of the wide variety of established, impactful legal services organizations in Chicago.</p>
Professional Liability	ACC Chicago relies on partner organizations to provide professional liability insurance.
<b>Pro Bono Projects</b>	
<i>Clinic in a Box<sup>®</sup> Program</i>	Since 2011, ACC Chicago has been partnering with DLA Piper, CPBO, The Law Project, and others to provide a Clinic in a Box <sup>®</sup>

	program for chapter members. The program is half-day legal audit that allows in-house counsel to advise nonprofit organizations or small businesses. On average, approximately 45 ACC Chicago members provide legal counseling to 12 local non-profits each year. The project has been very successful, and some members elect to provide follow-up counseling beyond the day of the event.
<i>Ladder Up Tax Assistance</i>	ACC Chicago has received great support in partnering with McDermott, Will & Emery (MWE) and local non-profit LadderUp to offer free tax assistance preparation services to low-income families across the Chicagoland area. This year, approximately 10 ACC Chicago members participated in the training at MWE's offices and subsequent volunteer sessions around the city. Although training for this event is extensive, members who participate are active and engaged in the process. A similar event is being planned for 2015.
<i>Ethics of Corporate Pro Bono</i>	ACC Chicago partners with CPBO and DLA Piper to provide CLE on ethical issues relating to pro bono work. Last year, more than 130 in-house counsel (in person at DLA Piper's offices, and remotely, throughout Illinois) listened to experts discuss ethics and other issues including recent changes to the Illinois rules relating to pro bono services provided by in-house counsel and ways to implement a pro bono program in a corporate law department. A similar event is planned with DLA Piper for fall of 2014.
<b>Lessons Learned</b>	
<i>Seek out and build on successful partnerships.</i>	Partnerships have been a win-win for ACC Chicago. The chapter can provide visibility to legal services organizations and advocacy projects, while partners can provide knowledge, resources and opportunities to serve.
<i>Be creative.</i>	ACC Chicago strives to identify opportunities that are flexible for members, such as short-term clinics. They also incorporate CLE into events when appropriate, as it garners member interest in the pro bono program. This can be done through volunteer training or sponsored events providing CLE on issues related to pro bono.
<i>Play the long game.</i>	It is important to recognize that certain activities will be more successful than others. However, by increasing the visibility of the pro bono program and consistently providing a range of opportunities for members, the Pro Bono Committee builds a foundation for success.

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## IN-HOUSE PRO BONO IN PRACTICE PROFILE: HOUSTON ACC CHAPTER

March 2014

For approximately twenty-five years, the Houston ACC Chapter (ACC Houston) has been formally encouraging and providing opportunities for its members to engage in pro bono activities. Currently, ACC Houston is involved in a number of pro bono efforts in the Houston community. Members regularly provide pro bono legal services at one or more Houston Volunteer Lawyers clinics, including a legal advice clinic, a clinic for veterans, and a wills and estates clinic. In addition, members from time to time provide ongoing advice to non-profit organizations such as Houston Habitat for Humanity and local animal shelters. Recently, members began working with Baker & McKenzie and the Tahirih Justice Center on a pilot program to represent applicants for asylum.

Tim Howard, chair of the ACC Houston Pro Bono Committee, reports that ACC Houston's pro bono program benefits the chapter, its members, and the community. For members, it provides a supportive avenue for them to get involved, which is particularly important for those who are nervous or unsure of how to use their unique legal skills to contribute to the community. The result is improved morale among ACC Houston members. In addition, Howard says that providing members with the satisfaction of giving back to the community and fulfilling the highest ethical calling of the profession is a great asset for the chapter.

General Program Information	
Pro Bono Contact	Timothy J. Howard, Chair, Pro Bono Committee
Region Served	ACC Houston serves the greater Houston area: generally, the counties of Harris, Fort Bend, Montgomery, Brazoria, Galveston, Wharton, and Waller.
Number of Members	1,149 members
Pro Bono Program History	<p>The ACC Houston Pro Bono Committee was formed in the late 1980s as a working body under the Board of Directors to serve a key function of the chapter. At the request of the Board, the committee adopted the following mission statement: "To increase the participation in pro bono legal services by members of the Houston area in-house legal community."</p> <p>Pro bono involvement is central to ACC Houston. Since formation of the pro bono committee, participation has waxed and waned, but with perseverance the program has grown and expanded. Since 2010, a new initiative has been added each year with great success.</p>
Pro Bono Leadership Structure	The ACC Houston Pro Bono Committee usually numbers between nine and eleven people and is led by a chair or co-chairs.

	<p>The committee chair or co-chairs are responsible for arranging committee meetings, proposing the yearly schedule of pro bono events, delegating to committee members event recruiting responsibilities, organizing the annual recognition event for pro bono participants, and generating new pro bono initiatives. Often, the committee chair is a board member, although it is not a requirement.</p> <p>The committee takes the lead in structuring, administering, and promoting the pro bono program. It convenes on a yearly basis to brainstorm events and then selects events in which to participate and host. As commissioned by the ACC Houston Board, the committee:</p> <ul style="list-style-type: none"> <li>• sponsors pro bono activities and recruits Chapter members to participate;</li> <li>• partners with local pro bono legal services providers to support and assist the outreach of those organizations; and</li> <li>• seeks new pro bono opportunities fit to the abilities and skills of in-house lawyers.</li> </ul>
Pro Bono Policy	ACC Houston does not have a pro bono policy.
Communications	<p>Chapter members receive information about pro bono activities a number of ways:</p> <ul style="list-style-type: none"> <li>• at the chapter-wide monthly meeting and CLE lunch;</li> <li>• on the chapter website (at least two months in advance); and</li> <li>• in the monthly “First Tuesday” email.</li> </ul> <p>In addition, chapter members who indicated an interest in pro bono in response to the chapter annual survey are contacted directly by committee members.</p>
Recognitions/Awards	<p>Annually, ACC Houston hosts a reception to honor participants in its pro bono program. The reception occurs prior to an annual comedy show organized by the local bar association. At the reception, a local community leader (often a judge) speaks and each pro bono participant is recognized individually with a gift (such as a desk clock, pen set, or shirt). In addition, the ACC Houston Pro Bono Committee purchases tickets to the comedy show for pro bono participants and chapter leaders.</p>
Tracking Pro Bono	<p>For purposes of determining participation for recognition and the like, ACC Houston or its partner organization records member attendance at sponsored events. The ACC Houston Pro Bono Committee retains a copy of the attendance record and tracks the total number of hours chapter members contribute.</p>
Partnerships	<p>Houston Volunteer Lawyers (HVL) is one of ACC Houston’s longtime pro bono partners. As such, a significant portion of the</p>



	<p>chapter's projects are coordinated or organized by HVL.</p> <p>Additionally, in 2013, the Chapter included in its top-level sponsorship package for law firms the opportunity to collaborate on a pro bono endeavor. Due to interest expressed by area firms, more opportunities to partner on pro bono efforts were added to the 2014 sponsorship packages.</p>
Professional Liability	ACC Houston relies on partner organizations to provide professional liability insurance.
<b>Pro Bono Projects</b>	
<i>Legal Advice Clinics</i>	<ul style="list-style-type: none"> <li>• Two Saturdays a year, ACC Houston commits to recruit at least five of its members to participate in HVL's Legal Advice Clinic. For several years, as many as 12 members have volunteered per clinic to interview clients, render legal advice, and, if necessary, refer the case for further representation. ACC Houston volunteers often concentrate on matters related to family law, wills and estates, landlord/tenant, and debtor's issues.</li> <li>To address concerns volunteers have about the range of client request at the clinics, pro bono leaders at the chapter personally invite chapter members to participate and discuss with them the clinics' benefits. These conversations often alleviate concerns and have helped to increase member participation.</li> <li>• In 2014, ACC Houston will provide five volunteer lawyers for two of HVL's afternoon/evening, weekday, call-in, legal advice clinics (once in the spring and again in fall). ACC Houston participated in this clinic previously and has added it back to the calendar.</li> </ul>
<i>Veterans Clinic</i>	Beginning in 2012, twice a year, five to ten chapter members staff a Friday afternoon clinic organized by HVL at the local VA hospital, during which legal advice is provided to military veterans. There, members provide legal advice regarding family law, wills and estates, landlord/tenant, and debtor's issues, as well as veterans benefits.
<i>Wills &amp; Estate Clinic</i>	In a partnership with HVL and the Halliburton Corporation legal department, the ACC Houston assists low-income individuals prepare estate-planning documents. Since 2011, 10-12 chapter members have volunteered for each clinic, which is held over the course of two Saturday mornings, one month apart. Volunteers meet with one or two clients during the first Saturday, prepare the necessary documents over the course of the month, and then participate in a formal signing with their clients at the second. In addition, members of the ACC Houston Pro Bono Committee reach out through Houston Habitat for Humanity to new homeowners without wills to encourage them to attend.

<i>Refugee Asylum Project</i>	In 2013, ACC Houston began working with Baker & McKenzie (a sponsor law firm) and the Tahirih Justice Center to represent applicants for asylum. At the first clinic in 2014, two chapter members teamed together to assist a victim of violence and abuse who is resident in the U.S. without legal status. Such representation includes interviewing, fact development, and petition drafting.
<b>Lessons Learned</b>	
<i>Give it a try.</i>	Both for the organization and for the individual, some risk is involved. Some activities will work; some will not. With each attempt, one learns more. For the individual, the first involvement may seem daunting, but taking that first step is crucial.
<i>Build a core group.</i>	A relatively small number of people can motivate an entire group—but those who are dedicated to an endeavor will inspire others. Therefore, it is beneficial to identify this core group around whom a larger group of people willing to commit some time and effort to learn and grow will coalesce.
<i>Find good legal services providers and partners.</i>	Local legal services organizations can be of great assistance to an ACC chapter's pro bono program, while ACC members may provide crucial support for the organization. Working together is better for both parties. The Houston legal community, for example, offers many ways to be involved for persons at any experience level and with any legal skill. The most difficult aspect in programming has been discerning which pro bono activities will offer the most successful way for in-house counsel to serve.
<i>Keep at it.</i>	Activities, and participation, will ebb and flow. Keep the program going; keep looking for new opportunities; and encourage new people to become involved.
<i>The support of Chapter leadership is a key.</i>	The ACC Houston Board of Directors and the ACC Houston Pro Bono Committee serve as a powerful motivator and can set the pace for the chapter's engagement in pro bono efforts. Collectively, the board and the committee have many contacts throughout the chapter, and networking can be a big boost to these efforts.

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## IN-HOUSE PRO BONO IN PRACTICE PROFILE: MINNESOTA ACC CHAPTER

March 2014

The Minnesota Chapter of the Association of Corporate Counsel (MNACCA) formalized its pro bono and community service efforts in 2008 when the MNACCA Community Service Committee was appointed by MNACCA's board of directors. Since then, it has provided members with opportunities to use their legal skills to help those in need, including veterans, local nonprofits, and small businesses. Reflecting on the benefits of the pro bono efforts, MNACCA Community Service Committee Co-Chair Fred Dawe notes:

“Our pro bono and community service programs have really provided wonderful opportunities for our members to serve. It is a benefit to both the community in which we live and work, and to our members. We often see members at our pro bono events that we don't see at other events, so we clearly have been able to provide a niche these members are searching for.

We find that our members love the pro bono opportunities. Many of our members, especially those in smaller law departments, do not have the opportunity to do pro bono work through their companies and we are thrilled to provide them with the chance to give back in their communities using their skills and their time.”

General Program Information	
Pro Bono Contact	Fred Dawe, Co-Chair, MNACCA Community Service Committee
Region Served	Minnesota
Number of Members	~ 700 members
Pro Bono Program History	Formed by the Board of Directors in 2008, MNACCA's Community Service Committee provides opportunities for members to give back to the community as well as to build and strengthen relationships within the chapter.
Pro Bono Leadership Structure	<p>MNACCA's Community Service Committee consists of a minimum of four members (currently there are 10) and is led by a chair or co-chairs, who are members of the board of directors (currently there are two co-chairs). There are no term limits.</p> <p>The Community Service Committee convenes at least four meetings per year. The committee organizes four to six pro bono or community service opportunities each year in which MNACCA members can participate. Each of these events is planned and led by two or three committee members. The committee co-chairs oversee all events.</p>
Pro Bono Policy	MNACCA's Community Service Committee has a charter, which

	<p>specifies the committee’s mission: “This Committee will provide members opportunities to give back to the community and to build and strengthen relationships within the Minnesota Chapter of Association of Corporate Counsel (MN ACC).” Among other provisions, the charter lists the following activities for the committee:</p> <ul style="list-style-type: none"> <li>• offer quarterly activities, which may include pro bono opportunities and non-legal community service opportunities;</li> <li>• strive to have at least two committee members lead an activity;</li> <li>• work with the Communications Committee to periodically provide information and materials of interest to members;</li> <li>• encourage active participation in all events sponsored by the Community Service Committee;</li> <li>• build relationships with other MN ACC Committees; and</li> <li>• develop productive working relationships with community service and/or pro bono committees within other chapters and ACC national staff.</li> </ul>
Communications	<p>MNACCA events are featured on the chapter website and invitations are distributed via email listservs and personal messages. Occasionally, announcements are also made at other events.</p> <p>Community Service Committee members help with event promotion and recruitment.</p>
Recognitions/Awards	<ul style="list-style-type: none"> <li>• <b>Chapter Newsletter.</b> All pro bono projects are the subject of a story spotlight (with photo, when available) in the chapter newsletter.</li> <li>• <b>Chapter Volunteer of the Year Award.</b> MNACCA selects a Chapter Volunteer of the Year Award. This award is not specifically focused on pro bono work, but often the recipient is someone who has provided pro bono legal services.</li> </ul>
Tracking Pro Bono	<p>MNACCA tracks the number of pro bono events and the list of volunteers at each. It does not track other information, such as number of clients served or hours contributed.</p>
Partnerships	<p>LegalCORPS and the Minnesota Assistance Council for Veterans are the chapter’s primary partner organizations. In addition to other legal service organizations, MNACCA has worked with Dorsey &amp; Whitney to co-host <b>Clinic in a Box<sup>®</sup></b> programs (described below).</p>
Professional Liability	<p>The chapter relies on partner organizations to provide professional liability insurance.</p>
<b>Pro Bono Projects</b>	
<i>Business Law Clinic</i>	<p>MNACCA co-hosts with LegalCORPS two business law clinics each year and commits to recruit four to six volunteers for each. At the</p>

	clinics, members provide free assistance in non-litigation business law matters to low-income owners of small business, nonprofits, and innovators.
<i>Clinic in a Box<sup>®</sup> Program</i>	MNACCA has co-hosted three Clinic in a Box <sup>®</sup> programs, in conjunction with <b>CPBO</b> , Dorsey & Whitney, and a local public interest organization. At each clinic, approximately 30 MNACCA members work in teams to conduct a legal audit for ten nonprofit organizations or small businesses.
<i>Veterans Clinic</i>	The Minnesota Assistance Council for Veterans hosts periodic legal clinics for veterans. Up to 20 chapter members a clinic volunteer and meet with veterans to provide legal assistance. Matters include seeking child support, criminal expungement, responding to debt collection, and drafting wills.
<b>Legal-Related Fundraising &amp; Community Service</b>	
<i>MNACCA Winter Gala</i>	In 2013, MNACCA held its first gala, benefiting three local organizations, including two legal services organizations: Cancer Legal Line and Mid-Minnesota Legal Aid. Now an annual event, the 2014 gala was hosted in February.
<b>Lessons Learned</b>	
<i>Know your membership</i>	Understand your members' interests and tailor your program accordingly.
<i>Be flexible with scheduling</i>	It is important to provide a wide array of dates and times for your events. By offering some events at breakfast, some at lunch and some after work or on weekends, the chapter is better able to reach out to potential volunteers and partners.
<i>Be innovative</i>	Be open to different opportunities. It is beneficial to bring in new pro bono partners on a regular basis so that members have the opportunity to volunteer with different organizations.

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## IN-HOUSE PRO BONO IN PRACTICE PROFILE: ACC NORTHEAST CHAPTER

*September 2014*

The Northeast Chapter of the Association of Corporate Counsel (ACC-Northeast) has a long tradition of providing pro bono assistance to those in need in the New England area. Under the leadership of the Pro Bono Publico Committee, the chapter has been active in multiple pro bono projects and is looking to expand and create new volunteer opportunities for its members.

Currently, ACC-Northeast's pro bono program is focused on two signature projects: the ACC-Northeast Mediation Program and co-hosting **Clinic in a Box**® programs. The Pro Bono Publico Committee Co-Chairs Christine Hughes and David Lintz say the efforts benefit the chapter in a variety of ways: "The pro bono [projects] complement the Chapter's other, more traditional continuing legal education and networking programs. They also draw the interest of members who might not be drawn to other programming. They provide junior lawyers the opportunity to develop their professional skills, and they give all participants a refreshing change from their "day jobs" and the chance to give back."

General Program Information	
Pro Bono Contact	Christine Hughes, Co-Chair, Pro Bono Publico Committee David Lintz, Co-Chair, Pro Bono Publico Committee
Region Served	ACC-Northeast serves five New England states – Maine, Massachusetts, New Hampshire, Rhode Island, and Vermont.
Number of Members	1,284 members
Pro Bono Program History	The ACC-Northeast Pro Bono Publico Committee was formed more than a decade ago to coordinate opportunities for members to provide pro bono services in the communities where they live and work.
Pro Bono Leadership Structure	The ACC-Northeast chapter Pro Bono Publico Committee is led by two co-chairs, who each take responsibility for one of the program's chief pro bono initiatives.
Pro Bono Policy	ACC-Northeast does not have a pro bono policy.
Communications	ACC-Northeast uses a variety of techniques to communicate with members, including emails, newsletters, website, announcements in meetings, and personal recruitment. It has also included opportunities for representatives of two complementary legal services organizations to give a brief presentation about pro bono opportunities during a chapter social or networking reception and posting information about the organizations on the chapter's pro bono webpage.
Recognitions/Awards	ACC-Northeast honors pro bono attorneys in its mediation program



	during a “Mediator Appreciation Evening” in June of each year. The event allows ACC-Northeast to thank its volunteers for their continued support and hard work.
Tracking Pro Bono	ACC-Northeast does not formally track pro bono.
Partnerships	The chapter partners with a variety of legal services organizations and law firms that are vital to the success of its pro bono program. It has worked with Mintz, Levin, Cohn, Ferris, Glovsky and Popeo to co-host Clinic in a Box <sup>®</sup> programs (described below). It also has a great relationship with The Arts & Business Council of Greater Boston and Lawyers Clearinghouse. The Arts & Business Council of Greater Boston provides training for individuals interested in serving nonprofit arts organizations and matches individuals with organizations that align with their interests and expertise. Lawyers Clearinghouse provides a myriad of opportunities for lawyers of all disciplines, as well as subject matter expertise.
Professional Liability	ACC-Northeast relies on partner organizations to provide professional liability insurance.
<b>Pro Bono Projects</b>	
<i>Clinic in a Box<sup>®</sup> Program</i>	For the past three years, ACC-Northeast has partnered with CPBO, Mintz, Levin, Cohn, Ferris, Glovsky and Popeo, and others to co-host an annual Clinic in a Box <sup>®</sup> program, during which volunteer lawyers receive training on various aspects of nonprofit law and then meet in teams with a Massachusetts-based nonprofit organization to review a legal issues checklist and provide advice. The program has been very successful, and 45 pro bono lawyers advised 12 nonprofit organizations at the most recent Clinic in a Box <sup>®</sup> program.
<i>ACC-Northeast Mediation Program</i>	Since 1990, ACC-Northeast has trained volunteer lawyers as mediators and arranged for them to provide mediation services for small claims (up to \$7,000) and trial docket mediations in the Woburn, Massachusetts and Dedham, Massachusetts small claims courts. Mediation training is ongoing, and services are provided to both courts on a weekly basis. The beneficiaries are the courts, their magistrates and litigants, as well as the ACC member volunteers who participate and have an opportunity to sharpen an important skill set. Currently, 74 pro bono attorneys volunteer for this program. ACC-Northeast is looking to increase volunteer participation and add additional courts.
<b>Lessons Learned</b>	
<i>Dedication is essential.</i>	It takes dedicated, focused individuals to get pro bono programs off the ground. Because of the assiduous work of previous Pro Bono Publico Committee Chairs and ACC-Northeast’s dedicated executive director, the Chapter’s pro bono program has thrived and expanded

	over the years.
<i>Focus on a few programs.</i>	It is better to do a few programs well and add new ones slowly, once the program expands and has more capacity.
<i>Don't be afraid of trial and error.</i>	Trial and error goes with the territory of creating and expanding a pro bono program. For example, ACC-Northeast has worked with multiple legal services organizations in order to find a steady and reliable partner for its Clinic in a Box <sup>®</sup> program.
<i>Be detail-orientated.</i>	ACC pro bono programs require a great deal of administrative support and attention to detail.
<i>Be willing to experiment.</i>	It is important to experiment with different communication methods and pro bono projects. While some of them may fail, others will succeed.

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## **IN-HOUSE PRO BONO IN PRACTICE PROFILE: SAN FRANCISCO BAY AREA ACC CHAPTER**

*September 2014*

The San Francisco Bay Area Chapter of the Association of Corporate Counsel (ACC-SFBA) formalized its pro bono program in 2009 and launched its pro bono efforts by co-hosting a **Clinic in a Box**® program. In the five years since then, ACC-SFBA has hosted a number of clinics and expanded the opportunities offered to members to include providing longer term pro bono engagements. Pro Bono Committee Co-Chairs Kevin Chung and Suk Lee attribute the growth of the chapter's program, in part, to being the largest ACC chapter with many members interested in pro bono and being located in the San Francisco Bay Area with a large number of law firms and legal services organizations that have strong pro bono programs and their willingness to partner with the chapter on pro bono.

Now, the chapter is turning its attention to working more closely with the many in-house legal departments in the San Francisco Bay Area to connect local in-house pro bono leaders and develop a strong community of volunteers that can leverage one other's efforts. In addition, with so many members and potential partners, comes administrative challenges. ACC-SFBA is exploring ways to improve its pro bono program through better communication methods and making the scheduling and planning of events more streamlined and efficient.

<b>General Program Information</b>	
Pro Bono Contact	Kevin Chung, Co-Chair, ACC-SFBA Pro Bono Committee Suk Lee, Co-Chair, ACC-SFBA Pro Bono Committee
Region Served	ACC-SFBA serves the greater Bay Area, including Marin, San Francisco, Palo Alto, San Jose, and areas of the East Bay.
Number of Members	~ 2,500 members
Pro Bono Program History	The Pro Bono Committee was created in 2009 to provide leadership and pro bono opportunities for chapter members. Beginning in 2014, chapter leaders are required to participate in at least one pro bono event each year, thus leading by example.
Pro Bono Leadership Structure	The current pro bono leadership structure consists of two co-chairs. They share responsibilities in identifying, promoting, developing partnerships, and facilitating pro bono opportunities for in-house counsel. The co-chairs organize at least four events per year (once per quarter) throughout the Bay Area. Five events are scheduled for 2014.
Pro Bono Policy	ACC-SFBA does not have a policy, but follows the California Bar Association recommendation that each attorney contribute up to 50 hours of pro bono legal services annually. Chapter leadership

	<p>believes that in-house attorneys, like all attorneys, have a professional responsibility to volunteer their services to help those in need obtain equal access to the justice system.</p> <p>To help members aspire to these recommended guidelines and associated responsibilities, the mission of the ACC-SFBA Pro Bono Committee is to exhort its members to vigorously engage in pro bono activities by identifying, promoting, developing partnerships, and facilitating pro bono opportunities for in-house counsel.</p>
Communications	ACC-SFBA members are made aware of pro bono opportunities through weekly email blasts to all members describing upcoming events. Specific emails regarding pro bono events are also sent to members as the event date approaches. In addition, chapter leaders promote directly to the membership community. There is also an on-going effort to create a network among in-house pro bono departments engaged in pro bono and ACC-SFBA to share opportunities.
Recognitions/Awards	ACC-SFBA does not formally recognize or provide awards to volunteers.
Tracking Pro Bono	ACC-SFBA tracks pro bono in a variety of ways. The chapter counts the number of events hosted, how many volunteers participate, how many clients are served, and the amount of hours the chapter as a whole contributes each year to pro bono. In addition, after each pro bono event, the Pro Bono Committee conducts an evaluation of the event to determine what went well and improvements that can be made for future events.
Partnerships	<p>ACC-SFBA has partnered with multiple legal services organizations and law firms to provide pro bono legal services. The Justice &amp; Diversity Center of the Bar Association of San Francisco (JDC) has become one of ACC-SFBA's primary partners, and it is looking to deepen its engagements with the organization, moving beyond the single day engagements to on-going activities, such as housing negotiations settlements. In particular, ACC-SFBA has recently started working with JDC's Community Organization Representation Project to create pro bono events focusing on employment law and general legal support for non-profit organizations (see below).</p> <p>Plans are underway to partner with Legal Services for Children (LSC) and Community Legal Services of East Palo Alto to provide free legal representation to children and youth with applications under the Deferred Action for Childhood Arrivals program.</p> <p>ACC-SFBA has also taken advantage of the strong presence of large, global law firms with formal pro bono programs in the Bay Area. In</p>

	the past two years, the chapter has partnered with DLA Piper for a small business legal clinic, Miller Law Group for an employment law clinic, and Covington and Burling for a clinic to support non-profit organizations.
Professional Liability	ACC-SFBA relies on partner organizations to provide professional liability insurance.
<b>Pro Bono Projects</b>	
<i>Transactional Pro Bono Clinics</i>	<ul style="list-style-type: none"> <li>• <b>Clinic in a Box<sup>®</sup> Program:</b> ACC-SFBA co-hosted six Clinic in a Box<sup>®</sup> programs during 2009 - 2012, partnering with CPBO, DLA Piper or Fenwick &amp; West, and TMC Working Solutions or JDC. During the clinics, ACC-SFBA members worked in teams to conduct legal audits for local nonprofits or small businesses. Between 19 and 54 members provided legal counseling to up to 15 local organizations at each clinic.</li> <li>• <b>Pro Bono Legal Audit Clinic for Small Businesses:</b> In August 2013, 23 ACC-SFBA members participated in the Community Legal Services in East Palo Alto Pro Bono Legal Audit Clinic for Small Businesses. Volunteer attorneys discussed with pro bono clients the results of a free legal audit and consulted with the clients on specific legal issues faced by their companies. DLA Piper attorneys provided training to the volunteers, and teams of in-house and law firm attorneys met with clients together. Employment law matters were a common issue for clients. ACC-SFBA plans to co-host more of these clinics in the future.</li> <li>• <b>Pro Bono Legal Clinic for Non-profit Organizations:</b> ACC-SFBA co-sponsored in February 2014 the Pro Bono Legal Clinic for Non-profit Organizations with Covington &amp; Burling and JDC's Community Organization Representation Project. Twenty-four pro bono members teamed up with Covington attorneys to provide free legal advice on a wide range of legal issues. Organizers note it was challenging to train the volunteer attorneys for a diverse range of legal issues faced by clients in the limited time allotted because the clinic did not focus on one particular legal area. However, the event was successful and had the largest recent ACC-SFBA volunteer turnout.</li> </ul>
<b>Legal-Related Fundraising &amp; Community Service</b>	
<i>Negotiation Skills Workshop with Citizen Schools</i>	For ten weeks beginning in February 2014, ACC-SFBA partnered with Fenwick & West to teach negotiation skills to disadvantaged middle school students at Citizen Schools, an afterschool program designed to expose young adults to new skills and positive role models that reinforce the value of education. More than 14 members

	participated in at least three sessions in which they conducted lectures and interactive exercises.
<b>Lessons Learned</b>	
<i>Leverage partnership opportunities with law firms.</i>	The San Francisco Bay Area has a strong presence of large, global law firms with dedicated pro bono coordinators. Partnering with these law firms provides ACC-SFBA with a great means to grow and develop its pro bono program.
<i>Provide a variety of pro bono opportunities to members.</i>	A big part of a successful pro bono program is providing a variety of opportunities. This year, ACC-SFBA will expand volunteer opportunities to include immigration and housing related services to better accommodate the varied interests of members.
<i>Provide a meaningful and rewarding first experience for volunteers.</i>	It is crucial for volunteers to have a great first pro bono experience, as it influences repeated participation. ACC-SFBA programs usually consist of lunch, one to two hours of training (with CLE credit), and up to two hours of client services. Follow-up services are purely at the option of the volunteer, but most volunteers are not engaged beyond the single day event. Thus, it is important that all elements of the afternoon are rewarding, from having applicable training sessions and to providing an opportunity in which volunteers can truly make a difference in a short amount of time. Volunteers that have a wonderful experience with pro bono the first time consistently reach out to the Pro Bono Committee leadership to inquire about future pro bono opportunities.
<i>Careful planning and providing training are key to engaging nervous volunteers.</i>	While some potential volunteers will be hesitant about providing services in subject areas that are not familiar, such concerns can be overcome with careful planning and providing training.

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## ACC CHAPTER WEBSITE GUIDE: PRO BONO

### Introduction

Pro bono efforts at ACC chapters are increasingly common and sophisticated. While Corporate Pro Bono, the pro bono arm of ACC has worked with many ACC chapters over the years, the pro bono efforts of ACC chapters have generally developed independent of one another. To increase cross-chapter learning and best practices, CPBO is developing a variety of resources for ACC chapters to highlight, share, develop and grow their pro bono efforts.

This website guide provides a template for ACC chapters to use to better communicate with their members and other ACC chapters about their pro bono efforts.

### Chapter Pro Bono Webpages

To better advertise its pro bono program and allow members to easily access information about new opportunities and upcoming events, each chapter should have a dedicated page for its pro bono activities that can be accessed from the chapter homepage by an identifiable link.

On the pro bono webpage, chapters may wish to include several key headings or categories.

#### ➤ Introduction

This could include a succinct description and a brief history of the chapter's pro bono efforts, as well as a mission statement or policy, for those chapters that have adopted one to guide their pro bono efforts.

*For example:*

*ACC XXX connects members with pro bono opportunities, by managing an opt-in listserv to notify interested members of service opportunities, hosting pro bono related volunteer and CLE events, and providing the resources listed below.*

*The mission of the ACC XXX's Pro Bono Committee is to identify and facilitate opportunities for ACC XXX members to use their unique legal skills to provide pro bono legal services to those in need. ACC XXX's Pro Bono Committee has adopted a pro bono policy <linked>.*

#### ➤ Pro Bono Leadership

Information under this header should include:

- the names and contact information for the pro bono chair(s)
- a list of the pro bono committee members

- information about how to get involved in leading pro bono efforts

*For example:*

*Members of the ACC XXX Pro Bono Committee:*

- *[Name], [Company] (Co-Chair)[email address or link]*
- *[Name], [Company] (Co-Chair)[email address or link]*
- *[Name], [Company]*
- *[Name], [Company]*
- *[Name], [Company]*

*For more information or to get involved, please contact one of the co-chairs or the ACC XXX Administrator [contact info].*

### ➤ Upcoming Events

Use this space to list upcoming chapter-sponsored or endorsed pro bono events.

*For example:*

*ACC XXX is pleased to offer the following pro bono events. To join ACC XXX's pro bono listserv and receive periodic emails about future pro bono opportunities, please email [ACC XXX administrator].*

*Name of Event <link to full event page>*

*Date*

*Time*

*Location*

*Brief Description/Additional Key Details*

### ➤ Additional Pro Bono Opportunities

Use this space to provide information about any recommended partners and opportunities.

*For example:*

*ACC XXX is pleased to provide information about two very worthy organizations that have pro bono opportunities available to our members. We hope that many of you will consider volunteering with one of these organizations as a means to fulfill your professional responsibilities.*

*[Description of organizations and pro bono opportunities, including instructions on how to volunteer.]*

*Other Pro Bono Organizations in the XXX [applicable region/jurisdiction] area:*

*[List with links]*

➤ Pro Bono Resources

Use this space to provide relevant resources, as well as information about CPBO.

*For example:*

*ACC XXX Resources & Links:*

*[Local statutes re pro bono]*

*ACC XX Insurance Information (if applicable)*

*FAQs [e.g., <http://www.acc.com/chapters/aust/faq.cfm> or [No Barriers to Pro Bono](#) flyer]*

*CPBO Resources:*

*CPBO, the pro bono arm of ACC, provides free assistance to chapters and members interested in pro bono, but are not sure how to go about it, in a variety of ways, including:*

- *co-hosting [Clinic in a Box®](#) programs;*
- *offering [publications](#);*
- *providing programming and training at the [ACC Annual Meeting](#);*
- *advising on [liability insurance options](#);*
- *addressing state [multijurisdictional practice rules](#) that may restrict in-house pro bono; and*
- *[identifying opportunities](#) and [partners](#).*

*For assistance or for more information, [contact CPBO](#).*

➤ Past Pro Bono Events & Highlights

Use this space to display updates and reviews of chapter pro bono activities. This might include:

- summaries of past events
- member spotlights
- pictures from events

*For example: <http://youtu.be/oymHZgUq6Qk>*

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## ACC CHAPTER WEBSITE TEMPLATE: PRO BONO<sup>1</sup>

[Name of Chapter]

### PRO BONO

#### Introduction

This section could include a succinct description and a brief history of the chapter's pro bono efforts, as well as a mission statement or policy, for those chapters that have adopted one to guide their pro bono efforts.

#### Pro Bono Leadership

Information under this header should include:

- the names and contact information for the pro bono chair(s)
- a list of the pro bono committee members
- information about how to get involved in leading pro bono efforts

##### Pro bono co-chair

Photo	Name
	Title
	Company
	Email Address

##### Pro bono committee member

Photo	Name
	Title
	Company

Contact [XXXX] for information about how to volunteer or get involved in pro bono leadership.

#### Upcoming Events

List upcoming chapter-sponsored or endorsed pro bono events here.

Photo or image	<b>Name of the Event</b> <link to full event page>
	Date
	Time
	Location
	Brief Description/Additional Key Details

Contact information of organizer and/or registration link.

---

<sup>1</sup> See the ACC Chapter Website Guide: Pro Bono for more details and examples.

## Additional Pro Bono Opportunities

Use this space to provide information about any recommended partners and opportunities.

[Description of organizations and pro bono opportunities, including instructions on how to volunteer.]

Other pro bono organizations in the XXX [applicable region/jurisdiction] area:

[List with links]

## Pro Bono Resources

Use this space to provide relevant resources, as well as information about CPBO.

### ACC XXX Resources & Links:

[Local statutes re pro bono]

ACC XX insurance information (if applicable)

FAQs [e.g., <http://www.acc.com/chapters/aust/faq.cfm> or [No Barriers to Pro Bono](#) flyer]

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- co-hosting [Clinic in a Box<sup>®</sup>](#) programs;
- offering [publications](#);
- providing programming and training at the [ACC Annual Meeting](#);
- advising on [liability insurance options](#);
- addressing state [multijurisdictional practice rules](#) that may restrict in-house pro bono; and
- [identifying opportunities](#) and [partners](#).

For assistance or for more information, [contact CPBO](#).

## Past Pro Bono Events & Highlights

Use this space to display updates and reviews of chapter pro bono activities:

- summaries of past events
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## PROFESSIONAL LIABILITY INSURANCE FOR IN-HOUSE PRO BONO

While in-house pro bono has grown dramatically in recent years, obstacles, both real and perceived, still exist, including concerns about professional liability or malpractice insurance, as it is often referred to by in-house counsel. While claims related to pro bono legal services are rare, it is a concern to many in-house volunteers and their employers, which, unlike law firms, do not typically carry such insurance. The good news is that there are several options for legal departments to address the risks associated with professional liability concerns:

### I. Work with a Legal Services Provider

One option is to engage in pro bono opportunities in coordination with a legal services provider that supplies insurance coverage for those who volunteer with the organization on a sponsored pro bono program. The amount and scope of coverage may differ among legal services providers. Of particular concern for in-house departments is whether coverage of non-lawyer volunteers is provided. Not all legal services providers supply such coverage so it is important to check before starting a project.

<b>Benefits:</b>	<ul style="list-style-type: none"><li>• no cost to the legal department</li><li>• legal department bears no responsibility for obtaining and managing coverage</li></ul>
<b>Drawbacks:</b>	<ul style="list-style-type: none"><li>• volunteers are limited to projects sponsored by legal services provider</li><li>• departments are limited to coverage provided by legal services provider</li></ul>

### II. Obtain Coverage Directly from an Insurer

Another option a legal department may choose is to work with its company's broker to obtain insurance directly from an insurer. Many insurance companies offer what is referred to as employed lawyers professional liability (ELPL) insurance, which can cover a variety of risks, including those associated with pro bono. In fact, some legal departments may already have this coverage. It is important for in-house counsel to talk with their risk managers or other colleagues responsible for insurance. If a legal department does not already have insurance that covers liability arising from pro bono work, there are several ways in which to obtain such coverage.

#### Add an Endorsement to Existing Policy

Some companies purchase directors and officers liability (D&O), or errors and omissions (E&O) insurance. If so, their insurer may be willing to add an endorsement to the company's existing policy to provide coverage for little or no cost. Such coverage will likely be subject to a sublimit of \$1 - \$5 million of coverage. It is important to verify that such an endorsement expressly includes pro bono work.



<b>Benefits:</b>	<ul style="list-style-type: none"> <li>• legal department has flexibility with regard to the projects undertaken</li> <li>• could include worldwide coverage</li> </ul>
<b>Drawbacks:</b>	<ul style="list-style-type: none"> <li>• possible increased premium</li> <li>• policy limits shared with existing liabilities</li> </ul>

### Purchase a Standalone Policy

In lieu of adding an endorsement to an existing policy, a standalone ELPL insurance policy may be purchased. Many ELPL policies provide coverage not only for work performed for the insureds' employer but also for pro bono work. In addition, it is possible to purchase a pro bono specific ELPL policy. While there are no standard policies of this nature, several insurance companies have form endorsements that will modify a standard ELPL policy to cover claims resulting from pro bono work exclusively. Such policies typically provide \$1 - \$5 million of coverage. For smaller legal departments, the annual premium for a policy providing \$1 million of coverage ranges from \$1,500 to \$3,000, depending on the policy limits, terms of coverage, and risk profile of the insured, which includes the size of the legal department and the specifics of its pro bono program.

<b>Benefits:</b>	<ul style="list-style-type: none"> <li>• legal department has flexibility with regard to the projects undertaken</li> <li>• could include worldwide coverage</li> <li>• policy limits dedicated to liability associated with pro bono</li> <li>• does not require an underlying policy</li> </ul>
<b>Drawbacks:</b>	<ul style="list-style-type: none"> <li>• premium</li> </ul>

### **III. Obtain Coverage from Outside Resource**

[The National Legal Aid & Defender Association \(NLADA\)](#) is a non-profit member association dedicated to increasing legal services for those who cannot afford counsel. One of the products and services NLADA offers its members is the opportunity to purchase Lawyers Professional Liability Insurance through the NLADA Insurance Program. As of June 2012, 1,100 members purchase such insurance, which is provided by Hanover Insurance Group. Annual NLADA membership dues for legal departments are typically around \$2,000. The Lawyers Professional Liability Policy offers up to \$5 million in limits. The typical annual premium for such coverage currently ranges from \$1,000 to \$2,500, depending on the policy limits, terms of coverage, and risk profile of the insured, which includes the size of the legal department and the specifics of its pro bono program.

<b>Benefits:</b>	<ul style="list-style-type: none"> <li>• legal department has flexibility with regard to the projects undertaken</li> <li>• coverage negotiated by NLADA</li> <li>• policy limits dedicated to liability associated with pro bono</li> </ul>
<b>Drawbacks:</b>	<ul style="list-style-type: none"> <li>• payment of premium and membership dues</li> <li>• coverage is subject to policy terms and conditions, and may have limitations on coverage for work performed outside of the U.S.</li> </ul>

## IV. Self-Insure

Some companies self-insure for many potential liabilities and are not inclined to purchase insurance. While a company's risk management department may be comfortable assuming the risks associated with pro bono legal services, members of the legal department who volunteer may still be concerned. In those circumstances, legal departments may consider issuing a letter or statement to volunteers expressly providing that the company will cover any risks.

### Considerations

Many legal departments have selected one or some combination of the options described above. Which option listed above is right for a particular legal department depends on the needs of its pro bono program and its company's existing insurance program. We recommend in-house counsel speak with their company's risk manager. In doing so, it is important to consider how the terms of any policy will interact with the structure of the legal department's pro bono program. For instance, some insurance policies require that pro bono work be "provided on behalf of the named insured." If a company with such an insurance policy also has a pro bono policy which states that all volunteers act on their own behalf and not in their capacity as employees of the company, the pro bono policy and insurance policy may be at odds. In addition, many legal departments' pro bono programs engage all members, attorneys and non-attorneys, located both in the U.S. and abroad. Legal departments interested in coverage of all participants in all locations should verify the terms of the applicable insurance policy.

### Providers

Insurance companies come in and out of various markets. Insurers that currently provide ELPL insurance are:

- [ACE](#)
- [Brunswick](#)
- [Chartis](#)
- [Chubb](#)
- [The Hartford](#)
- [Hiscox](#)
- [OneBeacon](#)
- [Philadelphia Insurance Companies](#)
- [Zurich](#)

Chubb has readily available endorsements to tailor its ELPL policies to pro bono policies if desired. Other insurers may be willing to do so as well.

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## **MULTIJURISDICTIONAL PRACTICE IN THE U.S.: IN-HOUSE COUNSEL PRO BONO**

Multijurisdictional practice rules pose a significant obstacle for many in-house attorneys participating in pro bono activities. Numerous in-house attorneys, though admitted and in good standing in one or more U.S. jurisdictions, are not licensed in the states in which they currently work. The practice rules in all but a few states permit in-house counsel licensed in other U.S. jurisdictions to represent their in-state employer, often through a registration or similar certification process, but many of these rules limit representation to the employer-client.<sup>1</sup> Some states provide pro bono exemptions, allowing non-locally licensed in-house counsel (“registered in-house counsel”)<sup>2</sup> to provide pro bono. However, a large number do not expressly permit these lawyers to practice in pro bono matters. And many of those jurisdictions that do subject registered in-house counsel to a number of restrictions, such as mandating that pro bono legal services be provided only in association with an approved organization or under the supervision of a locally licensed lawyer.

In recent years, a number of states have re-evaluated their rules and amended them to reduce or eliminate limitations on in-house pro bono service. More states are following suit. Currently, three jurisdictions have adopted provisions that eliminate restrictions and permit registered in-house counsel to engage in pro bono broadly while protecting clients and requiring lawyer competency – Illinois, New York, and Virginia.

### **Growth of In-house Pro Bono**

Over the past decade, in-house pro bono has grown tremendously. Many of the Fortune 500 companies and a majority of the Fortune 100 companies have either set up or are moving to establish formal pro bono programs for the lawyers in their legal departments. In addition, lawyers in smaller companies and legal departments engage in pro bono legal services through opportunities organized by Corporate Pro Bono (CPBO), ACC Chapters, legal service providers, bar associations, and other organizations.

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<sup>1</sup> In 2002, the American Bar Association (ABA) amended ABA Model Rule 5.5 Unauthorized Practice Of Law; Multijurisdictional Practice Of Law to authorize in-house counsel, licensed and in good standing in at least one U.S. jurisdiction, to practice for their employers without becoming admitted to the local bar and without registering or obtaining certification from the bar or court. Several jurisdictions have adopted the amended model rule. Most others have adopted rules that provide that non-locally licensed in-house counsel may work for their employer, but require them to register or obtain certification to do so. Only a few jurisdictions provide no exemption for non-locally licensed in-house counsel.

<sup>2</sup> For simplicity, this paper refers to all non-locally licensed in-house attorneys who practice in a jurisdiction that has adopted Model Rule 5.5 or a similar practice rule as “registered in-house counsel.”

The pool of registered in-house counsel who may participate in pro bono numbers in the thousands. In the following select jurisdictions, registered in-house counsel authorized to work in state for their employer number:

- more than 250 in Colorado
- more than 900 in Connecticut
- more than 350 in Delaware
- more than 700 in Florida
- more than 400 in Illinois
- more than 250 in Massachusetts
- more than 450 in New York
- more than 300 in Ohio
- more than 300 in Pennsylvania
- more than 850 in Virginia

### **Actions to Change Practice Rules**

In recent years, there have been a number of efforts to encourage states to change to their practice rules so that registered in-house counsel may engage in pro bono services more freely.

#### State Practice Rules

In-house counsel in Virginia worked to amend Virginia's practice rules to allow non-locally licensed in-house counsel authorized to work for their employer to also provide pro bono services. In 2006, Virginia adopted a rule that allowed its registered in-house counsel to provide pro bono services but only in partnership with an approved organization and under the supervision of a Virginia licensed lawyer among other restrictions. These limitations made pro bono practice impractical for many registered in-house counsel and limited the amount of pro bono provided to those in need in Virginia.

In the spring of 2010, following an access to justice summit hosted by the Virginia Supreme Court, lawyers from the Virginia State Bar, Virginia Bar Association, and the Association of Corporate Counsel worked with CPBO to submit a proposed amendment to the practice rules that the Virginia Supreme Court passed in 2011. Now, registered in-house attorneys may provide pro bono broadly, subject to the Virginia Rules of Professional Conduct.

Other states have made recent changes to their practice rules, including Connecticut, Iowa, Massachusetts, Minnesota, and New Jersey that allow for greater in-house pro bono involvement. However, unlike in Virginia, the rules in these jurisdictions impose several restrictions that narrow in-house pro bono engagement and limit the number of clients served.

In April 2013 Illinois, like Virginia, amended its existing registered in-house counsel provision to remove these types of restrictions and permit Illinois registered in-house counsel to provide pro bono broadly. In December 2013, New York adopted a similarly broad rule. Now, three states – Illinois, New York, and Virginia – have practice rules that permit registered in-house counsel to provide pro bono legal services with unnecessary limitations and while protecting clients and requiring lawyer competency. These provisions serve as [models for other jurisdictions](#).

## Conference of Chief Justices

In July 2012, the Conference of Chief Justices passed Resolution 11 “[In Support of Practice Rules Enabling In-House Counsel to Provide Pro Bono Legal Services](#)” asking CCJ members to “consider promoting the expansion of pro bono legal services, including by amending the practice rules to allow non-locally licensed in-house counsel who are permitted to work for their employer to also provide pro bono legal services subject to the local rules of professional conduct.”

### **Current Status of In-House Pro Bono Exceptions and Rules**

Below is a jurisdiction-by-jurisdiction<sup>3</sup> chart of the multijurisdictional practice rules applicable to non-locally licensed in-house counsel providing pro bono with a brief description of the terms of the rule and a link to the actual provisions. In sum, the number of jurisdictions that currently:

- permit in-house counsel who are not locally licensed (“registered in-house counsel”) to work for their employer under an unauthorized practice of law exception: **47**;
- allow registered in-house counsel to engage in pro bono legal services broadly, subject to the local professional rules of conduct: **3**.
- allow registered in-house counsel to provide pro bono legal services, only if “associated with” or “affiliated with” approved legal services organizations **or** under the supervision of a locally licensed attorney: **4**;
- allow registered in-house counsel to provide pro bono legal services, only if “associated with” or “affiliated with” approved legal services organizations: **12**;
- allow registered in-house counsel to provide pro bono legal services, only if “associated with” or “affiliated with” approved legal services organizations **and** under the supervision of a locally licensed attorney: **4**;
- are silent with regard to registered in-house counsel providing pro bono legal services **but** allow out-of-state lawyers, including in-house counsel, to provide pro bono legal services subject to a number of restrictions, which may include “associated with” or “affiliated with” approved legal services organizations, under the supervision of a locally licensed lawyer, and other limitations: **9**; and
- are silent with regard to registered in-house counsel **and** out-of-state lawyers providing pro bono legal services: **19**.

---

<sup>3</sup> This summary includes the fifty states and the District of Columbia. It does not include U.S. territories.

## Options That Do Not Require Local Bar Admission

### Out-of-State Attorney Provisions

A number of jurisdictions allow attorneys who are licensed out-of-state, including in-house counsel, to provide pro bono. Non-locally licensed in-house counsel in jurisdictions that do not expressly permit their pro bono participation may practice under these provisions. However, many of these rules impose more restrictions than those adopted specifically for in-house counsel, including being “associated with” or “affiliated with” approved legal services organizations and/or working under the supervision of a locally licensed attorney, as well as time limitations (as short as 90 days).

### Certain Pro Bono Matters

In-house counsel located in jurisdictions that do not expressly permit their involvement in pro bono may nonetheless be able to perform certain types of pro bono matters. These attorneys will need to focus on pro bono options that do not technically involve the practice of law, include practicing under the close supervision of an attorney licensed within the jurisdiction, or for which admission to the state bar is not otherwise required.

Some examples are:

- Dispute Resolution
- Intake and Screening
- Special Administrative Cases (including, but not limited to: Immigration, IRS, Medicaid, Military Discharge Upgrade, School Board Hearings, Social Security Benefits, Unemployment Insurance, Veterans’ Appeals, Welfare, Special Education)

Please note that while these general categories of work may not be considered the practice of law for the purpose of local bar rules, attorneys should consult the rules and counsel in the state in which they wish to do pro bono work. Some states consider the practice of law to include any and all work performed by a lawyer for a client, and thus, might not agree that this work does not require local admission. Also, be aware that under some policies, in order to qualify for the protections of malpractice insurance, an attorney must be in a lawyer-client relationship. In these circumstances, if a disgruntled recipient of services decides to sue the attorney, that attorney may not be able to argue that he/she was not practicing law for purposes of admission, but that he/she was for purposes of liability coverage.

*Pro hac vice* admission is also available to in-house attorneys interested in doing pro bono work on litigation matters, but is often a cumbersome and time consuming process.

\* \* \*



In an effort to share interests, ideas, and best practices learned from experiences like those in Virginia, and to create a broad-based approach to this obstacle, CPBO, a global partnership project of ACC and the Pro Bono Institute designed to support in-house pro bono in their efforts to do pro bono work, has formed a task force composed of in-house counsel from jurisdictions impacted by these restrictive rules. Legal departments and in-house lawyers interested in participating in, or learning more about, the task force should contact CPBO at [cpbo@probonoinst.org](mailto:cpbo@probonoinst.org).

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A global partnership project of the [Pro Bono Institute](#) and the [Association of Corporate Counsel](#)  
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## Summary of Multijurisdictional Practice Rules by State<sup>4</sup>

State	In-House Registration/Certification Requirement	Rule on Registered In-House Counsel Pro Bono Practice	Rule on Out-of-State Attorneys Providing Pro bono <sup>5</sup>	Pro Bono Provision <sup>6</sup>
Alabama	Yes	No	No	N/A
Alaska	No**	No	No	N/A
Arizona	Yes	AZ. Sup. Ct. <a href="#">Rule 38(i)(10)</a> and <a href="#">Rule 38(e)</a>	N/A	Registered in-house counsel may provide assistance as an unpaid volunteer in association with an approved legal services organization that employs at least one Arizona admitted attorney. Must be admitted to practice in another jurisdiction for at least 5 years.
Arkansas	No**	No	<a href="#">Administrative Order No. 15</a>	Out-of-state attorneys may provide pro bono services to persons of limited means who have been referred to the attorney by an authorized legal aid organization. Representation shall be under the auspices of the authorized legal aid organization.
California	Yes	Cal Rules of Court <a href="#">Rule 9.45</a> and <a href="#">Rule 9.46</a>	N/A	Registered in-house counsel may provide pro bono services while working under the supervision of one qualifying legal services provider. Counsel must apply to be a registered legal aid lawyer. Practice is permissible for no more than three years.
Colorado	Yes	<a href="#">C.R.C.P 204.1(4)</a>	N/A	Certified in-house counsel may provide pro bono legal services under the auspices of a court, a bar association or Access to Justice Committee-sponsored program, a legal services organization, or a law school, in accordance with Rule 6.1 of the Colorado Rules of Professional Conduct.
Connecticut	Yes	<a href="#">Sec. 2-15A(c)(5)</a>	N/A	Registered in-house counsel may provide pro bono legal services offered under the auspices of organized legal aid societies, or state/local bar association projects, or provided under the supervision of a member of the Connecticut Bar who is also working on the pro bono representation.
Delaware	Yes	<a href="#">Del. Sup. Ct. Rule 55.1(g)</a>	N/A	Registered in-house counsel may participate in the provision of any and all legal services pro bono publico in Delaware offered under the auspices of organized legal aid societies, or state/local bar association projects, or provided under the

<sup>4</sup> Some rules include additional restrictions. See the text of the actual rules for complete information.

<sup>5</sup> The chart notes out-of-state pro bono rules *only* for those jurisdictions that do not have a rule regarding registered in-house pro bono.

<sup>6</sup> All jurisdictions with a pro bono provision require that the attorney must be qualified and in good standing in one or more U.S. jurisdictions; therefore, we have not repeated this requirement for each. Some rules include additional restrictions. See the text of the actual rules for complete information.

\* These states do not make exceptions or allowances for non-locally licensed in-house counsel.

\*\*These states allow non-locally licensed in-house counsel to practice for their employer without registering.

State	In-House Registration/Certification Requirement	Rule on Registered In-House Counsel Pro Bono Practice	Rule on Out-of-State Attorneys Providing Pro bono <sup>5</sup>	Pro Bono Provision <sup>6</sup>
				supervision of a member of the Delaware Bar who is also working on the pro bono representation.
District of Columbia	No**	<a href="#">D.C. App. Rule 49 (c)(9)(D)</a>	<a href="#">N/A</a>	In-house counsel who qualify as “internal counsel” may provide pro bono legal services if assigned or referred by an organization that provides legal services to the public without fee; provided that the individual is supervised by an active member of the D.C. Bar.
Florida	Yes	<a href="#">Fla. Bar Reg. Rules 12 and 17-1.3(a)(4)</a>	N/A	In-house counsel certified as “authorized house counsel” may provide pro bono legal services as an “emeritus attorney” if: (i) receives approval from the Clerk of the Supreme Court, (ii) works in association with an approved legal aid organization, and (iii) works under the supervision of a Florida Bar member. If appearing in court or an administrative tribunal, the client and supervising attorney must provide written consent. The supervising attorney must sign all documents filed in any court or administrative tribunal.
Georgia	No**	No	<a href="#">Ga. Sup. Ct. 114-120</a>	Out-of-state attorneys may apply to provide pro bono services if supervised by a licensed practicing attorney who is employed by or volunteers with an enumerated organization. Valid for a period not to exceed 18 months.
Hawaii	No*	No	No	N/A
Idaho	Yes	No	No	N/A
Illinois	Yes	<a href="#">Ill. Sup. Ct. Rule 716(g)</a>	N/A	Registered in-house counsel may provide voluntary pro bono public services as defined in Rule 756(f) of the Illinois Rules on Admission and Discipline of Attorneys.
Indiana	Yes	No	No	N/A
Iowa	Yes	<a href="#">Iowa Court Rule 31.16</a>	N/A	Registered in-house attorneys are authorized to provide pro bono legal services through an established not-for-profit bar association pro bono program, or legal services program, or through such organization(s) specifically authorized in the state.
Kansas	Yes	No	No	N/A
Kentucky	Yes	No	No	N/A
Louisiana	Yes	No	No	N/A
Maine	No**	No	No	N/A
Maryland	No**	No	<a href="#">Md. Bar Adm. Rule 15</a>	Out-of-state attorneys may be certified to provide pro bono legal assistance, under the supervision of a Maryland Bar member, if associated with an organized legal services program that is sponsored or approved by Legal Aid Bureau and that provides

State	In-House Registration/Certification Requirement	Rule on Registered In-House Counsel Pro Bono Practice	Rule on Out-of-State Attorneys Providing Pro bono <sup>5</sup>	Pro Bono Provision <sup>6</sup>
				legal assistance to indigents in the state. Limited to 2 years.
Massachusetts	Yes	<a href="#">MA S.J.C. Rule 4:02(9)(b)</a>	N/A	Registered in-house counsel may provide pro bono under the auspices of either (1) an approved legal services organization or (2) a lawyer admitted to practice and in good standing in the Commonwealth of Massachusetts.
Michigan	Yes	No	No	N/A
Minnesota	Yes	<a href="#">MN Rules 9 and 10 for Admission to the Bar</a>	N/A	“House counsel” registered under Rule 10 and “temporary house counsel” registered under Rule 9 may provide pro bono legal services to pro bono clients referred to the lawyer through an approved legal services provider.
Mississippi	No*	No	<a href="#">MRAP 46(f)</a>	Out-of-state attorneys may provide pro bono services under the supervision of a qualified legal service provider.
Missouri	Yes	<a href="#">Sup. Ct. Rule 8.105(c) R.S.Mo.</a>	N/A	Registered in-house counsel may engage in pro bono work with an organization approved for this purpose by the Missouri Bar.
Montana	No*	No	No	N/A
Nebraska	Yes	<a href="#">Neb. Ct. R. §3-1201(D)</a>	N/A	Registered in-house counsel may provide pro bono legal services through an established not-for-profit association, pro bono program or legal services program or through such organizations specifically authorized in Nebraska.
Nevada	Yes	No	No	N/A
New Hampshire	No**	No	No	N/A
New Jersey	Yes	<a href="#">N.J. Rule: 1:27-2(g)</a>	N/A	Limited license in-house counsel may provide pro bono legal services as a volunteer with a certified legal services or public interest organization, law school clinical or pro bono program, or governmental entity.
New Mexico	Yes	No	<a href="#">NMR 15-301.2(C-F)</a>	Non-admitted attorneys may obtain a non-renewable 3 year legal services limited license to provide assistance to clients of qualified legal service providers.
New York	Yes	<a href="#">22 NYCRR § 522.8</a>	N/A	Registered in-house counsel may provide pro bono legal services in accordance with New York Rules of Professional Conduct rule 6.1(b) and other comparable definitions of pro bono legal services in New York.
North Carolina	No**	No	<a href="#">NC ST 84-8(3)</a>	Out-of-state attorneys permitted by the North Carolina Bar may represent indigent clients on a pro bono basis under the supervision of active members

State	In-House Registration/Certification Requirement	Rule on Registered In-House Counsel Pro Bono Practice	Rule on Out-of-State Attorneys Providing Pro bono <sup>5</sup>	Pro Bono Provision <sup>6</sup>
				employed by a nonprofit organization qualified to render legal services.
North Dakota	Yes	No	<a href="#">N.D.R. Adm. to Prac. Rule 3.1</a>	Out-of-state attorneys with 5+ years of experience may, upon application, practice as an unpaid volunteer under the supervision of an approved legal services organization so long as that organization employs at least one North Dakota attorney.
Ohio	Yes	<a href="#">Gov.Bar. R. VI, §3(E)</a>	N/A	Registered in-house counsel may provide pro bono legal service if the legal service is provided to either a person of limited means or a charitable organization and the legal service is assigned or verified by an approved organization.
Oklahoma	Yes	No	No	N/A
Oregon	Yes	<a href="#">OR St Bar Rule 16.05(7)(f)</a>	N/A	Registered in-house counsel may provide pro bono legal services through a pro bono program certified by the Oregon State Bar Bylaw 13.2, provided that the attorney has malpractice liability coverage.
Pennsylvania	Yes	<a href="#">PA Bar Rule 302(b)(3)</a>	N/A	Registered in-house counsel may participate in the provision of pro bono services offered under the auspices of organized legal aid societies or state/local bar association projects, or provided under the supervision of bar member who is also working on the pro bono representation.
Rhode Island	Yes	No	<a href="#">RI Sup. Ct. Art. II, Rule 2(e)</a>	Out-of-state attorneys may, upon application, provide assistance when associated with an organized and Supreme Court approved program providing legal services to indigents, which is funded in whole or in part by the federal government or Rhode Island Bar Foundation or sponsored by an ABA law school or the Rhode Island public defender. Limited to 2 years.
South Carolina	Yes	<a href="#">SC App. Ct. Rule 405(l)</a>	N/A	Registered in-house counsel may provide pro bono legal services if associated with an approved legal services organization which receives, or is eligible to receive, funds from the Legal Services Corporation or is working on a case or project through the South Carolina Bar Pro Bono Program; provided that he or she is supervised by a member of the South Carolina Bar.
South Dakota	No**	No	No	N/A
Tennessee	Yes	<a href="#">Tenn. Sup. Ct. Rule 7 § 10.01(c)</a>	N/A	Registered in-house attorneys may provide pro bono legal services through an established not-for-profit bar association, pro bono program or legal services program or through such organization(s) specifically authorized in this jurisdiction.
Texas	Yes	No	No	N/A

State	In-House Registration/Certification Requirement	Rule on Registered In-House Counsel Pro Bono Practice	Rule on Out-of-State Attorneys Providing Pro bono <sup>5</sup>	Pro Bono Provision <sup>6</sup>
Utah	Yes	No	No	N/A
Vermont	No**	No	No	N/A
Virginia	Yes	<a href="#">V.S.C.R. 1A:5 Part I(g)</a>	N/A	Certified in-house counsel may provide voluntary <i>pro bono publico</i> services in accordance with Rule 6.1 of the Virginia Rules of Professional Conduct.
Washington	Yes	<a href="#">Wash. APR Rule 8(f)(8)</a>	N/A	Registered in-house counsel may provide legal services for no fee through a qualified legal services provider for indigent clients. If such services involve representation before a court or tribunal, the lawyer shall seek pro hac vice admission and any fees for such admission shall be waived.
West Virginia	No*	No	<a href="#">W. Va. Admission to the Practice, Rule 9.0</a>	Out-of-state attorneys, upon application, may provide pro bono legal assistance in all causes in which he or she is associated with an organized legal services or public defender program sponsored, approved or recognized by the Board of Law Examiners. An attorney can only practice under this rule for 36 months.
Wisconsin	Yes	<a href="#">SCR 10.03(4)(f)(Comment)</a>	N/A	Registered in-house counsel may provide pro bono legal services to qualified clients of a legal service program.
Wyoming	No**	No	No	N/A

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# **A Survey of *Pro Bono* Practices and Opportunities in 71 Jurisdictions\***

**Prepared by Latham & Watkins LLP  
for the Pro Bono Institute**

*August 2012*

\*This package includes only the index for "A Survey of Pro Bono Practices and Opportunities in 71 Jurisdictions." For the full survey, please visit: [www.cpbo.org/lathamglobalsurvey](http://www.cpbo.org/lathamglobalsurvey)

This memorandum and the information it contains is not legal advice and does not create an attorney-client relationship. While great care was taken to provide current and accurate information, the Pro Bono Institute and Latham & Watkins LLP are not responsible for inaccuracies in the text.



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## FOREWORD

This Survey of *Pro Bono* Practices and Opportunities in 71 Jurisdictions goes back to an initiative of the Pro Bono Institute and Latham & Watkins to make information about global *pro bono* legal services accessible. The first edition of the survey published in 2005 covered 11 jurisdictions, mostly in Europe. The 2012 edition covers over 70 jurisdictions in Europe, Asia and the Pacific region, the Americas, Africa and the Middle East. As the interest in global *pro bono* has grown, and this survey with it, the conversation about global and international *pro bono* has shifted. Whereas the focus just a few years ago was on issues of permissibility and compatibility with the local legal system, the focus today is decidedly practical: *pro bono* has gained in acceptance and the question is how, not whether, *pro bono* representations can be undertaken. The developments have been profound and exciting.

The survey is part of an ongoing effort, shared by many law firms, organizations and corporate legal departments, to promote and stimulate the growth of *pro bono* representation globally and in international settings. Its purpose is to serve as an introductory resource for law firms, private practitioners, in-house lawyers and NGOs seeking to engage or learn more about the culture and provision of *pro bono* in their own or other countries. The chapters describe, for each jurisdiction, what access-to-justice or publicly funded legal aid programs exist, what unmet needs for legal representation remain, what perceptions or culture shape the discussion of *pro bono*, and what professional-conduct laws and rules provide the framework for *pro bono* representation.

In 2012, lawyers from Latham & Watkins' 30 offices around the globe have updated all prior chapters and added chapters covering nearly 30 new jurisdictions. We consider the survey to be a work in progress and welcome your feedback and comments to help us improve future versions (please direct your requests to: Gianni.DeStefano@lw.com). While we have worked, to the extent possible, with local counsel and NGOs to provide information that is both current and accurate, we note that the situation in many of the jurisdictions is fluid, and that errors and omissions are unavoidable. The survey is therefore a work in progress in this sense as well and we invite your comments.

We owe a debt of gratitude to Esther Lardent and Tammy Taylor of the Pro Bono Institute, with whom we have collaborated on this project. The survey is the effort of a large team, involving not only many lawyers at Latham & Watkins, but also local law firms and practitioners, in-house lawyers and NGOs around the globe. We are grateful for their contributions and their time.

August 2012

Gianni De Stefano and Wendy Atrokhov

## CO-ACC Pro Bono Interest Survey

1. Do you have an interest in doing pro bono work?
  - Yes
  - No
2. If you answered no to Q1, why aren't you interested in doing pro bono work? Please check all that apply.
  - Lack of Resources
  - Unaware of Pro Bono Opportunities
  - Department Does Not Have a Pro Bono Program
  - Unauthorized Practice Concerns
  - Lack of Management Support
  - Lack of interest
  - Pro bono work doesn't match existing skill sets
  - Time constraints
  - Other (please specify) \_\_\_\_\_
3. Does your legal department have a formal or informal pro bono program?
  - Yes, formal
  - Yes, informal
  - Neither
4. Have you provided pro bono legal services while working as in-house counsel in the last 3 years?
  - Yes
  - No
5. If you answered yes to Q4, what types of pro bono projects have you worked on? Please check all that apply.
  - Clinic in a Box<sup>®</sup> Program
  - Advice-only/Counseling Clinic (not including Clinic in a Box<sup>®</sup> Program)
  - Clinic with Ongoing Representation (not including Clinic in a Box<sup>®</sup> Program)
  - Litigation
  - Research
  - Educational/Training
  - Document Drafting
  - Intake Clinic
  - Assisting with Applications
  - Negotiation
  - Mediation/Arbitration

- Policy Advocacy
- Transactional Counsel to Nonprofits
- Transactional Counsel to Small Businesses or Microenterprises
- Other:

6. If you answered yes to Q4, on average how much time have you dedicated to pro bono legal services over the last three years?

- 0 hours per year
- 1- 5 hours per year
- 6 – 10 hours per year
- 11 – 15 hours per year
- 16 – 20 hours per year
- More than 20 hours per year

7. If CO-ACC partners with UWCO to provides pro bono legal services to UWCO member agencies (nonprofits), how likely are you to get involved:

- Very unlikely
- Somewhat unlikely
- Somewhat likely
- Very likely

8. How much time would you be willing to dedicate to pro bono legal services with the CO-ACC Chapter throughout the course of a year?

- 0 hours per year
- 1- 5 hours per year
- 6 – 10 hours per year
- 11 – 15 hours per year
- 16 – 20 hours per year
- More than 20 hours per year

9. How interested are you in providing the following types of pro bono service to local nonprofit organizations? (Please indicate your interest on a scale of one to four.)

Not interested	Somewhat interested	Interested	Very interested
1	2	3	4

- Training and education programs about specific legal issues
- Limited advice
- Ongoing assistance
- Legal assessment
- Other (please specify)

10. In what legal areas would you be interested in providing assistance to UWCO member agencies (nonprofits)? Please check all that apply.

- Corporate Law and Governance
- Insurance and Risk Management
- Corporate Compliance
- Board Responsibility and Duties
- Nonprofit Mergers and Consolidations
- Contracts
- Real Estate and Leases
- Intellectual Property
- Technology and Internet
- Privacy and Confidentiality
- General Employment
- Hiring and Firing
- Harassment Policies
- Employee/Independent Contractor Issues and Exempt/Non-exempt Employee Issues
- Volunteers
- Human Rights for Individuals in Care
- Taxes
- Applying for Tax Exemption
- Maintaining Tax Status
- Fundraising and Revenue Generating Activities
- Political Activities
- Advertising
- Other, please specify

11. Are you interested in receiving regular communications about upcoming pro bono opportunities and information about in-house pro bono events?

- Yes
- No

12. Are you interested in taking a leadership role in CO-ACC's pro bono program?

- Yes
- No

13. If you answered yes to Q11 or Q12, please provide your contact information so we can follow-up with you:





# We have Overcome the Barriers to in-House Pro Bono work!

## I am not admitted in Colorado.

**Easy!** In-house attorneys admitted in at least one state can obtain pro bono/emeritus status in CO to perform pro bono legal work for the indigent. See Rule 223: <http://www.cobar.org/index.cfm/ID/3235>. Attorney must:

- Pay a one-time fee of \$50.00 (ACC CO will pay this for the attorney)
- Be admitted in at least one state, in good standing, and not subject to disciplinary action
- Work under the auspices of a Colorado non-profit whose purpose includes provision of pro bono legal representation to indigent or near-indigent persons.
- Annually file registration identifying non-profit for which you are performing pro bono work (ACC CO can prepare this for you).

## I don't have malpractice insurance.

**We've got you covered.** ACC Colorado has purchased malpractice insurance to cover pro bono work performed by its members where:

1. the project is approved by ACC Colorado; **and**
2. the member holds him or herself out as performing the work as a member of ACC Colorado.



## I don't have resources to commit to long-term pro bono projects.

**We understand!** The Colorado Supreme Court adopted limited representation or "unbundling rules" to promote pro bono participation. Most ACC Colorado projects are limited to a few hours. Some projects allow continued representation if the volunteer chooses to continue. For example:

- Clinic in a Box<sup>SM</sup>: Volunteer lawyers commit to 4.5 hours, but may continue to work with the non-profit after that if they choose to do so.
- Project Homeless Connect: Volunteers commit to a 3-hour shift (morning or afternoon).

## I don't have expertise in areas where indigents need help.

**No Problem!** No expertise is needed for many projects, and ACC Colorado will train you and pair you with an experienced lawyer where expertise is needed. For example: Project Homeless Connect, where volunteers (including paralegals) are partnered with experienced veterans, and Clinic in a Box, where volunteer work is preceded by 1.5 hours of training, volunteers are paired up with another lawyer, and subject matter experts are on-site for consultation.



## I am a patent lawyer.

**Wonderful!** ACC CO has partnered with the Colorado Bar Association to participate in the ProBoPat program, which pairs patent lawyers with individuals who need help prosecuting a patent.



## I am a transactional lawyer.

**Even Better!** ACC Colorado has many pro bono opportunities that use the skills of transactional lawyers, including:

- Clinic in a Box<sup>SM</sup>: Half-day program in which lawyers attend 1.5 hours of CLE on legal issues faced by non-profits, followed by 2-hour session in which they work through a legal audit checklist with non-profit representative.
- CU Entrepreneur Law Clinic
- Transactional Pro Bono Initiative: Assist pre-screened micro-entrepreneurs with legal issues.
- Assist CU students with Basic business entity training at Mi-Casa and Centro San Juan Diego.

## I am looking for projects that include all members of the Law Department.

**Absolutely!** Many of the projects that ACC Colorado works on in conjunction with CLC include opportunities for paralegals and admins. For example, Project Homeless Connect pairs paralegals and lawyers who have never worked the event before with experienced lawyers, and has experienced criminal defense and public service lawyers available for consultations on site during the event. The Colorado Bar Association recognizes a Pro Bono Paralegal of the Year every year.

## I'd like a comprehensive policy in place before we launch pro bono work.

**We'll help you do this.** We have prepared a model pro bono policy for in-house lawyers, available here: <http://www.acc.com/chapters/colo/probonooutreach.cfm>. In addition, the Pro Bono Institute has many sample policies and resources for in-house legal departments, available here: <http://www.cpbo.org/resources/sample-documents/>.



## A Monumental Month for CPBO and ACC Chapters

*The PBEye – November 5, 2013*

As a reader of **The PBEye**, you likely already know that CPBO works with ACC Chapters around the world on their pro bono efforts, from hosting [Clinic in a Box<sup>SM</sup> Programs](#) to [developing ongoing pro bono programs](#). Last month, CPBO had the pleasure of working with several Chapters in three cities across the U.S., as well as talking to other Chapters leaders from far and wide.

### ACC Chicago

First, on October 11, CPBO, along with ACC Chicago, local in-house pro bono leaders, and **DLA Piper**<sup>†</sup>, hosted an [in-house pro bono event](#) in Chicago. The event included a panel discussion on “The Ethics of In-House Pro Bono” and networking time for in-house counsel and public interest organizations. Broadcast online around



Illinois, the event was attended by more than 130 in-house counsel, in-person and around the state. The event was a grand success not only because of the great turn-out. The panelists – Thomas Sabatino, Jr., then-ACC Board Chair and executive vice president, general counsel and corporate secretary of **Walgreen Co.**<sup>\*\*</sup>, Illinois Supreme Court Chief Justice Thomas Kilbride, Traci Braun, associate general counsel at **Exelon Corporation**<sup>\*\*</sup>, Peter Lindau, assistant general counsel at DLA Piper, and Eve Runyon, director of CPBO – engaged in a robust discussion about the ethics rules applicable to in-house pro bono, highlighting the recent [Illinois practice rule amendment](#) that removes restrictions on registered in-house counsel providing pro bono legal services. Since then, several legal departments have contacted CPBO to learn more about in-house pro bono.

### ACC Charlotte



Next, on October 16, Shannon Graving, assistant director of CPBO traveled south to speak at the Charlotte Chapter’s Pro Bono Awareness Luncheon. In-house counsel from a wide variety of Charlotte area legal departments came together to talk about pro bono efforts at their departments and the Chapter. Deborah Edwards, pro

bono chair of the Charlotte Chapter and deputy general counsel at Piedmont Natural Gas Company, Inc., began the program by welcoming attendees and highlighting the Charlotte Chapter's plans for increased pro bono efforts. Graving then led the group in a discussion about many of the issues of greatest concern to in-house counsel, particularly those new to in-house pro bono, including [how to get started](#), [multijurisdictional practice issues](#), [professional liability insurance](#), [budgets](#), and [balancing pro bono and community service activities](#). Those in attendance with more in-house pro bono experience shared their tips and Graving provided information, in addition to CPBO resources.

### ACC-SoCal

Finally, CPBO headed west to co-host a Clinic in a Box<sup>SM</sup> Program at the ACC Annual Meeting with ACC-SoCal, **Alston & Bird**\*†, and Public Counsel on October 28. During the clinic, 40 volunteer attorneys from around the country received training from Alston & Bird before meeting in teams to conduct a legal audit of 10 local nonprofit organizations. The legal assessment covered issues pertinent to nonprofits, including governance, employment, tax, intellectual property, and real estate. The local nonprofit organizations served a variety of communities, including children, senior citizens, and affinity neighborhoods.



In addition to these three great events, CPBO was pleased to speak with the many ACC Chapter leaders who stopped by the [CPBO booth at the ACC Annual Meeting](#) and looks forward to working with them all!

If you are interested in learning more about how **CPBO can assist your ACC Chapter** develop a pro bono program or become involved in pro bono related issues, contact CPBO at [cpbo@probonoinst.org](mailto:cpbo@probonoinst.org).

\* denotes a signatory to the Law Firm Project Pro Bono Challenge<sup>®</sup>

† denotes a Member of the Law Firm Pro Bono Project

\*\*denotes a Signatory to the Corporate Pro Bono Challenge<sup>SM</sup>



## ACC Chapters and Pro Bono

*The PBEye – January 30, 2013*

Since its inception, CPBO has worked closely with the Association of Corporate Counsel (ACC) and many local chapters of the organization on pro bono matters. ACC currently has [54 chapters](#), which represent more than 30,000 in-house counsel around the globe. ACC Chapters are engaged in improving access to justice in a number of ways, including coordinating pro bono projects for their members, supporting local legal services organizations, developing important connections between in-house volunteers and pro bono opportunities, and expressing the voice of the in-house bar on access to justice related issues, such as authorized in-house counsels' right to practice pro bono.

ACC Chapter pro bono programs are important for a variety of reasons. While hundreds of legal departments have formalized pro bono programs, there are many more that do not. Furthermore, for lawyers in smaller legal departments, a formal pro bono program might not be practical for a number of reasons, including a lack of resources. Certainly, in any case, convening in-house counsel to engage in and support pro bono legal services is beneficial for the volunteers and clients in need.

### ACC Chapter Pro Bono Projects

ACC Chapter pro bono projects vary from ongoing periodic events to one-time opportunities. For example, the [Houston ACC Chapter](#) participates in a number of pro bono events, including regular monthly clinics with the Houston Volunteer Lawyers Program, ranging in scope from a dedicated wills clinic to a general legal advice clinic. In addition, the **Northeast Chapter of ACC** trains and supplies mediators for weekly small claims mediations and summary process at local courts. A popular pro bono event with many ACC Chapters is the [CPBO Clinic in a Box<sup>SM</sup> program](#). In 2012 alone, [ACC-Northeast](#), the [Minnesota Chapter](#), [ACC Chicago](#), and the [San Francisco Bay Area Chapter](#), co-hosted such programs, with volunteers conducting a legal audit of dozens of local organizations in need of legal assistance.

### Connecting In-House Volunteers and Opportunities

Another example of the role ACC Chapters can play is by promoting pro bono participation and providing the tools for their members to get involved. For instance, the [Ontario Chapter's](#) campaign "[IN Your Corner](#)" encourages members to provide pro bono by offering training and volunteer opportunities. The **Charlotte ACC Chapter** takes an in-person approach and has hosted several Pro Bono Forums, bringing together its members and representatives from legal services organizations, to highlight pro bono opportunities and address issues of concern to in-house attorneys interested in providing pro bono legal services.

### ACC Chapter Pro Bono Support

In addition to hosting numerous CPBO Clinic in a Box<sup>SM</sup> programs, the San Francisco Bay Area Chapter established a [Stewardship Committee](#) five years ago to support local legal services organizations that serve clients in need in the Bay Area. Since its formation, the Committee has carefully considered the criteria for beneficiaries and donated more than \$200,000 to selected organizations located in the Chapter's members' key communities, ranging in size from small to large, which serve children, the elderly, people living with AIDS, and the financially disadvantaged.

### Voice of the In-House Bar on Pro Bono

For in-house counsel, ACC is the leading source for news and information about in-house practice, and ACC Chapters have played an important role in spreading the word among their members about issues related to in-house pro bono. A recent key issue is addressing practice rules that allow non-locally licensed in-house counsel to work for their employer, but do not allow them to provide pro bono legal services without restriction. Many in-house counsel are not aware of the [issue](#), which CPBO and ACC have been working to address for several years. Through Chapter outreach, in-house counsel are increasingly interested in changing such rules and have become engaged with CPBO and ACC in efforts to do so.

How has your ACC Chapter engaged in pro bono? Please let us know by leaving a comment below. If you are interested in learning more about how [CPBO can assist your ACC Chapter](#) develop a pro bono program or become involved in pro bono related issues, contact CPBO at [cpbo@probonoinst.org](mailto:cpbo@probonoinst.org).



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## **Canuck Corporations Embrace Pro Bono** *The PBEye – June 27, 2011*

Teen sensation Justin Bieber ain't the only hot ticket out of Ontario these days. This evening at the happy hour, the [Ontario Chapter](#) of the Association for Corporate Counsel will team up with [Pro Bono Law Ontario](#) to launch the ***IN Your Corner*** campaign over cocktails!

The campaign encourages corporate legal departments to partner up with local legal service providers to offer turnkey pro bono opportunities to corporate lawyers and transform in-house legal culture. The Volunteer Lawyers Service, Child Advocacy Project's Education Law Program, and Law Help Ontario are among the NGOs that will harness in-house legal talent to assist persons of limited means.



In a show of support for this pro bono initiative, special guest Laurie Pawlitza, treasurer of the Law Society of Upper Canada, will help kick off tonight's shindig.

Mad props from **The PBEye** to Ontario's corporate legal community for its commitment to enhance access to justice through in-house pro bono.

Are *you* in the know about an exciting emerging pro bono initiative abroad? Tell us all about it.



## Pro Bono Assistance for Young Immigrants

*The PBEye – April 23, 2013*

When President Obama announced the [Deferred Action for Childhood Arrivals](#) (DACA) program in June 2012, undocumented immigrants were given the opportunity to step out of the shadows and finally pursue their dreams of becoming doctors, engineers, and teachers in the U.S. The program gives a two-year, renewable reprieve from deportation to undocumented immigrants who meet a [variety of eligibility requirements](#), including those who came to the U.S. before age 16 and are in school, high school graduates, or military veterans. Potential participants also need to be under the age of 31 and have lived in the U.S. for five years. An [estimated 1.7 million people](#) are eligible for the program and as of January 154,404 have been granted deferred action.

The large demand for legal advice for those seeking a reprieve has led lawyers around the country to gather and provide pro bono assistance to the qualifying immigrants. In Illinois, the [National Immigration Justice Center](#) (NIJC) holds weekly clinics to meet the needs of the estimated 75,000 youth between the ages of 16 to 30 in Illinois eligible for the DACA program. Attorneys from **Exelon Corporation\*\*** partnered with **Dentons\*† (formerly SNR Denton)** to help staff these clinics. The legal department at United Airlines and the Chicago chapter of the [Association of Corporate Counsel](#) also volunteer at these clinics. They work directly with clients to fill out the 20-page application for deferred action and help them find document evidence to prove their eligibility.

Volunteer lawyers from **Latham & Watkins LLP\*†** have focused [their efforts](#) on meeting with young undocumented immigrants in San Diego and determining their eligibility for the DACA program. These meetings have been invaluable for Latham lawyers, as they have underscored the importance of equal access to justice to all members of society, including those living in the shadows.

Law students have also recognized the necessity of providing quality pro bono legal services to young, undocumented immigrants. [Professors and students at the University of Texas School of Law](#) created a partnership between the [Law School's Pro Bono Program](#) and the [Immigration Clinic](#) in order to hold legal clinics for undocumented immigrants. The clinics, held in the Austin area, assist qualifying attendees in completing and filing applications for the program. The astounding success of these clinics has led the law school to partner with organizations in the Rio Grande Valley to serve young immigrants in the border region.

While immigration law is a new venture for many attorneys, they have quickly risen to the occasion and are well aware of what is at stake for many of the young men and women they are helping. As [Ben Weinberg](#), pro bono partner at Dentons who volunteers with NIJC, stated: “These are people who are underground, coming out and saying we feel so strongly about working and being productive members of society that we’re going to shine a light on ourselves to the federal government that has the power to send them far away.”

Immigration will continue to be a hot button issue as Congress works to find a cohesive solution to assist all undocumented immigrants. To learn about immigration-related pro bono opportunities and developments, contact [Tammy Taylor](#) or [CPBO](#).

*\* denotes a Signatory to the Law Firm Pro Bono Challenge<sup>®</sup>*

*† denotes a Member of the Law Firm Pro Bono Project*

*\*\* denotes a Signatory to the Corporate Pro Bono Challenge<sup>SM</sup>*



## WHO WE ARE & WHAT WE DO

### About Corporate Pro Bono

Corporate Pro Bono (CPBO), a global pro bono partnership project of the Association of Corporate Counsel (ACC) and Pro Bono Institute (PBI), is the premier resource for legal departments, ACC chapters, and in-house attorneys interested in providing pro bono legal services. Since 2000, CPBO has offered support to in-house lawyers, legal departments, and ACC chapters, providing online resources, training, surveys, research materials, onsite pro bono clinics, and confidential consultation services.

The CPBO website, [www.cpbo.org](http://www.cpbo.org), is a great place to get started if you are an in-house lawyer wondering how to start a pro bono program in your legal department or ACC chapter or looking for answers to commonly asked questions about in-house pro bono. Our valuable online resources include sample documents, the latest news in in-house pro bono, best practices profiles, as well as publications and toolkits to answer any questions your department or chapter may encounter.

### Clinic in a Box<sup>®</sup> Programs

CPBO utilizes its **Clinic in a Box<sup>®</sup>** model to conduct onsite pro bono programs throughout the U.S. in collaboration with ACC chapters or legal departments, local nonprofit organizations, and major law firms. These programs provide in-house counsel with the opportunity to advise nonprofit organizations or small businesses. They are an ideal introduction for in-house counsel to apply their business skills to pro bono service.

### Corporate Pro Bono Challenge<sup>®</sup> Initiative

In recognition of the unique role that in-house lawyers and legal departments play at the intersection of law and business, CPBO launched the **CPBO Challenge<sup>®</sup>** initiative. Developed at the request and with the advice and counsel of chief legal officers, the CPBO Challenge<sup>®</sup> initiative enables legal departments to identify, benchmark, and communicate their commitment to pro bono service to coworkers, colleagues in other law departments, and outside law firms by encouraging chief legal officers to use their best efforts to involve at least one-half of their legal staff in support of and participation in pro bono service. In addition, chief legal officers who sign the CPBO Challenge<sup>®</sup> statement agree to encourage the outside law firms with whom they work to publicly acknowledge their support for pro bono by becoming signatories to PBI's **Law Firm Pro Bono Challenge<sup>®</sup>** statement.

### Providing High Quality Consultation Services

CPBO offers free consultation services to in-house lawyers, legal departments, and ACC chapters. We have years of experience in successfully guiding legal departments and chapters of all sizes and across industries to establish strong, effective, and enduring pro bono programs. This broad perspective gives us a unique ability to suggest a range of strategies that will work most effectively in individual departments and chapters.

## Promoting Partnerships

Because PBI works closely with a wide range of law firms and public interest groups throughout the world, CPBO has the capacity to assist with identifying the most appropriate partner or partners for a legal department or chapter's pro bono effort and to help structure partnerships that are enduring and effective.

## Join Us at the Pro Bono Institute Annual Conference

Each year, the PBI Annual Conference brings together pro bono practitioners from legal departments, law firms, and public interest organizations around pressing issues in pro bono. During the first day of the Annual Conference, CPBO offers programming that is customized specifically for in-house leaders responsible for the oversight, support, direction, and administration of their pro bono programs. Following the in-house track, in-house attendees have the opportunity to meet, network with, and learn alongside their colleagues from law firms and public interest organizations in interactive sessions during days two and three of the Annual Conference.

To learn more about CPBO's services, please visit our website at [www.cpbo.org](http://www.cpbo.org), or contact CPBO, at [cpbo@probonoinst.org](mailto:cpbo@probonoinst.org).

Developed by Corporate Pro Bono  
A global partnership project of the [Pro Bono Institute](http://www.probonoinstitute.org) and the [Association of Corporate Counsel](http://www.acccounsel.org)  
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## **Clinic in a Box<sup>®</sup> Programs**

**CPBO** offers a suite of off-the-shelf models designed to create pro bono opportunities for legal departments and ACC chapters.

**Clinic in a Box<sup>®</sup> Program – Legal Audit:** Developed by CPBO, these half-day clinics provide in-house counsel the opportunity to conduct a legal audit of nonprofit organizations or small businesses while earning CLE credit. The legal audit clinic focuses broadly on five areas of law: governance, employment, intellectual property, real estate, and tax. The clinics are produced in collaboration with legal departments or ACC chapters, major law firms, and local public interest organizations.

**Clinic in a Box<sup>®</sup> Program – Select Topic:** Similar to the **Clinic in a Box<sup>®</sup> Program – Legal Audit**, these half-day clinics provide in-house counsel the opportunity to advise nonprofit organizations or small businesses while earning CLE credit. The select topic clinic focuses in depth on specific legal areas, identified by the host organizations. They are produced in collaboration with legal departments or ACC chapters, major law firms, and local public interest organizations.

**Clinic in a Box<sup>®</sup> Program – Legal Education:** Inspired by the **Clinic in a Box<sup>®</sup> Program – Legal Audit**, this model provides in-house counsel the opportunity to educate nonprofit organizations or small businesses on select legal topics, answer questions, and provide brief advice. The two hour program may be hosted as a series or may stand alone as an individual event. It is produced in collaboration with legal departments or ACC chapters, major law firms, and local public interest organizations.

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## **Ethics of In-House Pro Bono**

**CPBO's** Ethics of In-House Pro Bono program is an off-the-shelf, customizable presentation for in-house attorneys interested in legal pro bono service. The program identifies ethical rules relevant to in-house pro bono practice and highlights best practices for in-house counsel to avoid ethical or liability issues in pro bono matters. The one to two hour presentation covers several topics, including:

- managing pro bono matters;
- multijurisdictional practice rules;
- avoiding conflicts of interest and positional/business conflicts; and
- providing limited scope representation.

CPBO provides guidance, sample resources, and materials to legal departments or ACC chapters to host an ethics program. CPBO also provides onsite assistance, including panel participation, if desired.

Legal departments or ACC chapters may host an ethics program with a law firm or other interested organizations. Co-host responsibilities may include obtaining CLE credit and securing a location for the program.

To read about previous Ethics of In-House Pro Bono programs:

- **Blogs about Ethics of In-House Pro Bono programs**
- **Illinois and In-House Pro Bono**
- **Verizon Ethics Program**
- **PNC Bank Hosts Ethics Program**

To learn more or to co-host an Ethics of In-House Pro Bono program for your ACC chapter or legal department, **contact CPBO**.

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