



## **THE WILLIAMS COMPANIES BEST PRACTICES IN PRO BONO**

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### **Program Background**

In fall 2006, Jim Bender, general counsel of The Williams Companies, Inc. (Williams) joined other legal department members for a visit to the Legal Aid offices in Tulsa. After meeting with the dedicated Legal Aid staff, the Williams legal department was moved by the unmet need for legal services among the community's poorer population and sought a way to assist the organization in meeting those needs.

Subsequently, the University of Tulsa Law School advised Legal Aid that it was discontinuing its Older Americans Law Project clinic, which had provided free legal services to persons 60 years of age or older. Legal Aid contacted Williams to see if it could help fulfill this urgent community need.

The Williams legal department held a meeting to discuss the opportunity presented and to ask for volunteers. Williams approached Hall, Estill, Hardwick, Gable, Golden & Nelson, P.C. (Hall Estill), Tulsa's largest firm, asked the firm to join in the effort, and managed to recruit approximately 40 lawyers and paralegals to sign on as Legal Aid volunteers. Nearly two-thirds of Williams' legal department in Tulsa participates in the program. This marked the largest influx of volunteers ever absorbed by Legal Aid and surpassed their long-term volunteer recruitment goals. Without support from Williams, Legal Aid would not have been able to provide many of the services needed by the elderly poor in the community.

### **Partnerships and Training**

Before beginning their work with Legal Aid, however, the volunteers needed to receive training about elder law. They recruited a local attorney, Bob Farris, and Judges Theresa Dreiling and Linda Morrissey to hold sessions on a variety of relevant issues. The training sessions were videotaped and, along with other instructional materials, were added to the Legal Aid website so that they could be easily accessed by subsequent volunteers. Williams periodically offers updated training, particularly as it prepares to expand the services it provides to the Legal Aid clients.

Exemplifying the type of top-down support that can cause a program like this to flourish, Bender personally took on the first case, and the program was launched. The volunteers have thus far been able to cover the needs of the community's elderly poor for estate planning and other end-of-life issues and have been able to meet the most critical guardian ad litem needs of the local guardianship court. The team has branched out to include services to unrepresented tenants in the local forcible entry and detainer docket.

The organizational processes in place are designed to create an efficient use of resources among Williams, Legal Aid, and Hall Estill. One paralegal at Williams and another at Hall Estill consult

with Legal Aid on case intake and assignment. Legal Aid handles the actual referral and once a lawyer is assigned to a client, it is the client's responsibility to contact the lawyer. Williams often assigns two individuals to each case, which helps in case of a work conflict and also allows the volunteers to build relationships with their co-workers. Legal Aid receives a closing memo from the attorney or paralegal when the case is concluded.

Williams has used its partnership with Legal Aid to fulfill a community need that would otherwise go unmet. While Legal Aid does everything in its power to assist those in need, without Williams' support it would simply lack the manpower to take on many of these cases. The efficient referral process lessens the demands on the Legal Aid staff. This partnership has allowed an overworked Legal Aid office to better meet the needs of those who would not otherwise receive legal services.

In April of 2008, Bender signed the Corporate Pro Bono Challenge<sup>SM</sup>. In addition to its efforts, Williams has issued an "Oklahoma Challenge" to some of the state's significant companies, asking that they join them in signing onto the Corporate Pro Bono Challenge<sup>SM</sup>.

### **Maintaining Momentum**

For Williams, the "trick" is maintaining momentum and enthusiasm. The company has a solid intake and assignment system in place, but they have also found it important to find ways for the broader group to share experiences and encourage one another. In order to accomplish this, the company has group lunch meetings or other functions every few months. In addition to sharing experiences, these lunches are used to recruit new volunteers. One method that Williams is using to bring in new people is to have each volunteer bring someone to the lunch with them who has not yet volunteered.

Williams also implemented a knowledge management system, which includes a Legal Aid project form library, as well as a library of wiki pages containing and preserving the legal and practical knowledge developed by the department about its Legal Aid services.

### **Lessons Learned**

- Support from the top is key. Top-down initiatives effectuate change on a broad scale and allow the pro bono program to flourish and mature more quickly.
- Use the team for support and motivation. Frequent meetings and discussions about pro bono work allows for legal department members to provide each other with encouragement. Sharing experiences helps to maintain the momentum and enthusiasm of a program.
- Leverage technology. Pro bono blogs and sites encourage collaboration amongst legal department members. This can also keep the department up to date and provide a forum for discussing future opportunities.

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