



**IN-HOUSE PRO BONO IN PRACTICE PROFILE: AETNA INC.**

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Aetna’s Law & Regulatory Affairs Department has a long and distinguished history of pro bono service that began with the creation of a formal pro bono program 35 years ago. Today, under the leadership of Vice President and General Counsel William J. Casazza, Aetna’s pro bono program supports members of the Law & Regulatory Affairs Department who participate in pro bono activities, including attorneys, paralegals, and administrative staff. Participating in pro bono is ingrained in the department’s culture as evidenced by the fact that Aetna, a charter **Corporate Pro Bono Challenge**<sup>®</sup> signatory, has routinely exceeded the 50 percent participation **CPBO Challenge**<sup>®</sup> goal.

Aetna’s pro bono work has ranged from co-founding Lawyers for Children America (LFCA), an organization dedicated to representing abused and neglected children, to unique projects pursued by individual volunteers. The pro bono program not only helps the communities where Aetna is located, but also helps its lawyers and staff develop valuable skills.

<b>General Program Information</b>	
Offices with Legal Staff	HQ: Hartford, CT; Blue Bell, PA; 15 other offices in the U.S.
Size of Legal Depart.	83 Attorneys; 46 Legal Assistants
Pro Bono Leadership Structure	Aetna’s pro bono program is led by one coordinator.
Pro Bono Policy	<p>Aetna adopted a written pro bono policy in 1980, which among other things:</p> <ul style="list-style-type: none"> <li>• states the importance of pro bono at Aetna and strongly encourages participation;</li> <li>• lists the benefits of participating, which includes:               <ul style="list-style-type: none"> <li>▪ helping fulfill Aetna’s corporate responsibility;</li> <li>▪ meeting volunteer’s ethical responsibilities; and</li> <li>▪ providing an opportunity to develop analytical skills, powers of persuasion and good judgment in a variety of situations that volunteers might not otherwise encounter;</li> </ul> </li> <li>• sets forth how to pursue opportunities in addition to Aetna sponsored projects, including obtaining insurance coverage, reviewing each potential pro bono matter, and consulting with the respective directors of those organizations and their supervisor to determine whether:               <ul style="list-style-type: none"> <li>▪ the case is compatible with workload constraints and professional qualifications;</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>▪ there are any legal or business/public relations conflicts;</li> <li>▪ the legal issue raised is frivolous or untenable;</li> <li>▪ there will be adequate supervision; and</li> <li>▪ the case is appropriate for pro bono representation;</li> </ul> <ul style="list-style-type: none"> <li>• notes that work on authorized pro bono matters will be positively factored into performance evaluations (there is no down-grade for non-participants); and</li> <li>• requires volunteers to maintain appropriate records for each matter.</li> </ul>
Mandatory Pro Bono	Pro bono work is not mandated but is strongly encouraged and supported.
Communications	Pro bono opportunities and successes are communicated via email, at meetings, and on the department's intranet. In addition, Aetna's pro bono coordinators conduct personal outreach, which often has been the most effective means to reach potential volunteers.
Recognitions/Awards	Aetna's legal department recognizes staff for their pro bono work in a variety of ways, including presenting awards, hosting ceremonies, and recognizing participation at department meetings.
Tracking Pro Bono	Aetna tracks participation in pro bono for purposes of the CPBO Challenge <sup>®</sup> survey, as well as tracks clients and matters.
Partnerships	Aetna works with multiple legal services providers and other legal departments. Aetna occasionally partners with law firms, and encourages its outside firms to engage in pro bono and participation is a factor in selecting counsel.
Professional Liability	Coverage is provided for work with an approved organization under Aetna's general liability insurance coverage.
Non-Lawyer Involvement	Non-lawyer staff are also encouraged to participate in pro bono.
<b>Key Pro Bono Projects</b>	
<i>Children Advocacy</i>	<ul style="list-style-type: none"> <li>• <b>Lawyers for Children America.</b> In 1994 Aetna's legal department helped found Lawyers for Children America (LFCA) to recruit volunteer lawyers to represent abused and neglected children. A year later, LFCA became an independent nonprofit, which Aetna continues to support by providing office space and covering all operating expenses.</li> <li>• <b>Center for Children's Advocacy.</b> Also in Connecticut, Aetna works with the Center for Children's Advocacy and the Connecticut Medical-Legal Partnership, sending more than 30 lawyers and paralegals in 2014 members to help advocate for children and their families.</li> </ul>

	<ul style="list-style-type: none"> <li>• <b>Montgomery Child Advocacy Project.</b> In the Blue Bell, Pa. location, Aetna’s legal department has provided representation to victims of child abuse and neglect through a partnership with the Montgomery Child Advocacy Project.</li> </ul>
<i>Legal Aid to the Elderly</i>	From its headquarters in Hartford, Conn., Aetna has worked with the Connecticut Lawyers’ Legal Aid to the Elderly Program (CLLAE) since its founding in 1981. CLLAE finds volunteer lawyers to take pre-screened cases and directly answer phone calls from senior citizens. Over the years, Aetna’s legal department has handled hundreds of cases dealing with estate planning, Medicare, Medicaid, and Social Security benefits.
<i>Holocaust Survivors</i>	Aetna has served as the lead for three legal clinics in Connecticut for Bet Tzedek Legal Services, a non-profit which provides legal support to Holocaust victims eligible for reparations under a program announced by the German government in 2007. Aetna provided the majority of staff for the clinics, as well as reached out to local law firms to recruit more volunteers. Beginning in 2011, Aetna followed up these clinics by reviewing previously denied applications for survivors.
<i>Local and Individual Projects</i>	<ul style="list-style-type: none"> <li>• <b>Blue Bell, Pa.</b> Aetna’s Blue Bell office partners with Legal Aid of Southeastern Pennsylvania to volunteer at several in-person client intake sessions each month.</li> <li>• <b>Individual Projects.</b> Aetna makes an effort to pair attorneys with pro bono projects that appeal to them, by conducting a department-wide skills inventory and maintaining an interests list. This has led to pro bono legal work for non-profit health clinics, veterans’ organizations, art collaboratives, schools, and other clients.</li> </ul>
<b>Lessons Learned</b>	
<i>Understanding volunteer interests increases participation</i>	Aetna encourages its legal staff to pursue pro bono legal matters related to their interests. With skills and interests inventories, Aetna has helped provide its staff with more opportunities to do pro bono legal work on issues that mean something to them personally and sustained interest and participation over many years.
<i>Leadership from the top is an important guiding force</i>	General Counsel Casazza fully supports the pro bono program. He follows in the footsteps of previous general counsel such as Zoe Baird, who guided Aetna to help found Lawyers for Children America.
<i>Incorporate pro bono in regular business practices</i>	Aetna allows employees to do pro bono work on company time, dedicates portions of regular legal department meetings to discuss pro bono activities, and factors pro bono work into its employee review process.

<i>Partnering can create opportunities for smaller offices</i>	Aetna's Blue Bell partners with Legal Aid of Southeastern Pennsylvania to volunteer at several in-person client intake sessions each month, providing a critical service to an overburdened legal aid organization and a rewarding opportunity for members of the legal department. Aetna sees this relationship as a model for integrating smaller offices into the larger department pro bono program.
<i>Integrate new staff into the rewarding culture of pro bono</i>	Aetna provides information about its pro bono program to all new lawyers and legal staff and encourages them to embrace the existing pro bono culture. This is particularly important when integrating teams joining the departments due to acquisition and merger.

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