



IN-HOUSE PRO BONO IN PRACTICE PROFILE: ZURICH NORTH AMERICA

October 2017

Zurich North America (ZNA) launched its pro bono program in 2011 to provide members of the Corporate Law Department with opportunities to enhance their legal skills and assist disadvantaged clients in their communities. “Investing in our communities is ZNA’s commitment in action – to deliver on our promise to make a sustainable difference,” says General Counsel Dennis F. Kerrigan, Jr., who provides leadership and support to the department’s pro bono activities and signed the **Corporate Pro Bono Challenge**[®] statement in 2016.

ZNA’s Corporate Law Department, including attorneys, paralegals, and administrative professionals participate in pro bono work as diverse as providing advice regarding special education, estate planning, representing the elderly and veterans, counseling non-profits, and assisting with matters related to housing and homelessness. From the inception of its pro bono program, ZNA has used technology to track its activities, ensuring recognition for participants as well as communication regarding available pro bono opportunities. The resulting metrics show that there has been an increase in volunteer time and skills of at least 46%. Through 2016, ZNA volunteers have spent 2,740 hours on 178 projects and now more than 50% of the department participates in pro bono legal services.

General Program Information	
Offices with Legal Staff	HQ: Schaumburg, IL; Owings Mills, Maryland; Omaha, Nebraska; New York City, New York; Overland Park, Kansas
Size of Legal Depart.	37 Attorneys; 35 Non-Attorney Staff
Pro Bono Leadership Structure	ZNA’s pro bono program is led by an eight-member pro bono committee, headed by a chair who also serves as the pro bono coordinator.
Pro Bono Policy	ZNA has adopted a formal pro bono policy, which among other things: <ul style="list-style-type: none"> • Establishes a pro bono committee of eight people that <ul style="list-style-type: none"> ○ Administers the pro bono program and reports on the status of pro bono activities and solicits feedback. ○ Adopts and maintains a set of policy guidelines for the pro bono program. ○ Recommends pro bono matters to members of COL that will encourage the largest participation of employees as possible and designate pre-approved pro bono referral agencies.

	<ul style="list-style-type: none"> ○ Evaluates and resolves any conflicts arising under pro bono matters. ○ Ensures that malpractice insurance is provided for all pro bono matters in which a member participates. ○ Arranges and publicizes training opportunities for participating in the pro bono program. ● Permits pro bono work to be undertaken during work hours. ● Provides for an approval process for pro bono projects members want to undertake that are not pre-approved. ● Encourages non-lawyers to volunteer for pro bono projects. ● Provides for timekeeping and reporting of pro bono projects for the purpose of assessing the time required of certain tasks and not to track individual performance.
Mandatory Pro Bono	Pro bono participation is not required, but is strongly encouraged. Volunteers are approved to spend up to 40 hours a year on pro bono.
Communications	Pro bono coordinator sends out emails to a volunteer list at least once a month.
Recognitions/Awards	Articles are published on a regular basis on company intranet.
Tracking Pro Bono	The ZNA database tracks the number of activities, volunteers, and hours spent providing pro bono legal services.
Partnerships	ZNA partners with local ACC chapters as well as law firms and legal services organizations in its pro bono efforts.
Professional Liability	In some instances, pro bono organizations cover professional liability. In other instances, ZNA provides this coverage for licensed attorneys.
Non-Lawyer Involvement	ZNA encourages non-legal staff in the Corporate Law Department to participate in its pro bono program. In addition, ZNA has expanded its program to include the Compliance and Government & Industry Affairs Departments.
Key Pro Bono Projects	
<i>Special Education Helpline</i>	ZNA has provided pro bono support for Equip for Equality's Special Education Helpline since 2012, with a pool of over 25 volunteers staffing a weekly three-hour shift. Pro bono volunteers consult with families of children of disabilities, providing a legal resource for parents who are searching for special education options for their children. (Chicago)
<i>Criminal Record Expungements</i>	<ul style="list-style-type: none"> ● Cabrini Green Legal Aid Project. ZNA volunteers assist individuals who seek employment in the healthcare field in having their criminal records expunged. (Chicago) ● Chicago Bar Foundation's Corporate Leadership Circle

	<p>Clinic. ZNA’s lawyers have aided in writing petitions for expungement so that their clients may overcome statutory barriers to employment. (Chicago)</p>
<p><i>Advising Nonprofit Organizations</i></p>	<ul style="list-style-type: none"> • Nonprofit Formation. ZNA Corporate Law Department represented Half Tab Man Disaster Assistance Relief, a charitable organization founded in the wake of Superstorm Sandy, in its legal formation and 501(c)(3) application. (New York City) • Clinic in a Box® Program. ZNA has provided pro bono legal counsel to Chicago-area nonprofits through its participation in the ACC Chicago Clinic in a Box® program, during which volunteers conduct a legal audit of the nonprofit, addressing governance, employment, tax, intellectual property, and real estate. (Chicago)
<p><i>Individual Representations</i></p>	<ul style="list-style-type: none"> • Immigration. Working with the Archdiocese of Washington Immigration Legal Services, a ZNA volunteer represented a mother to establish custody of her two young daughters so that they in turn could obtain Special Immigrant Juvenile Status. (Owings Mills)
<p>Lessons Learned</p>	
<p><i>Utilize available technology to encourage involvement and improve delivery of services</i></p>	<p>By utilizing the Zurich database to track pro bono efforts, ZNA is able to analyze progress and manage pro bono opportunities for its staff members.</p>
<p><i>Legal departments can be company leaders with regard to service</i></p>	<p>While ZNA has a company-wide dedication to service, the ZNA Corporate Law Department’s pro bono program has paved the way for other departments to get involved in their communities across the U.S.</p>
<p><i>Leadership from the top to support our communities</i></p>	<p>General Counsel Dennis Kerrigan started the formal pro bono program at ZNA and fully supports employees doing pro bono work on company time and is committed to the communities where we live and work to make a lasting impact.</p>

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