

## IN-HOUSE PRO BONO IN PRACTICE PROFILE: DISCOVER FINANCIAL SERVICES

November 2023

Discover Financial Services’ Law Department formalized its pro bono program in 2012, the same year that it became a signatory to the **Corporate Pro Bono Challenge® initiative**. The program developed organically out of pro bono work that Law Department members were doing at the time. From its inception, the pro bono program has enjoyed support from senior attorneys. The General Counsel, Hope Mehlman, is both a participant in and champion of the program.

“I am very proud to be part of a Company and a Law Department that so strongly values and supports my participation in pro bono activities,” said Chantal Kazay, a Director and Senior Counsel for Discover Financial Services’ Law Department and the Co-Chair of Discover’s Pro Bono Committee.

Law Department members report that doing pro bono work has allowed both legal staff and lawyers to give back to the community in a substantive and charitable way while creating opportunities for employees to work on new legal issues. Additionally, the pro bono program has had a significant and positive impact on teamwork, creativity, and empathy within the Department.

Discover has also collaborated with other legal departments and a law firm to create a court-based help desk to serve domestic violence survivors in the community close to the company’s headquarters, an innovative model that leverages volunteer resources across legal departments.

| General Program Information   |  |
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| Offices with Legal Staff      | HQ: Riverwoods, IL; Other U.S. offices: Washington, D.C.; Houston, TX; Phoenix, AZ   |
| Size of Legal Department      | 72 attorneys and 41 legal staff  |
| Pro Bono Leadership Structure | The pro bono program is led by a committee that is co-chaired by two individuals. Each committee member owns or co-owns a specific event or external partner relationship. Both lawyers and legal staff sit on the committee.  |
| Pro Bono Policy               | <p>The Law Department has a pro bono policy, which addresses topics such as:</p> <ul style="list-style-type: none"> <li>• <b>Participation:</b> The Law Department encourages, but does not require, attorneys, paralegals, and staff to do pro bono on an annual basis.</li> <li>• <b>Administration:</b> The pro bono committee administers the pro bono program. The General Counsel appoints the co-chairs of</li> </ul> |

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|                          | <p>the committee.</p> <ul style="list-style-type: none"> <li>• <b><u>Conflict Checking</u></b>: Volunteers must check for direct and apparent conflicts of interest before taking on a pro bono representation.</li> <li>• <b><u>Expenses</u></b>: Non-routine expenses must be reviewed and approved in advance.</li> </ul>   |
| Mandatory Pro Bono       | Pro bono is voluntary, but is encouraged.  |
| Communications           | Members of the Law Department communicate about pro bono by email, personal conversation, posting on the Law Department bulletin board, hand-outs, and during both team meetings and all-law meetings.   |
| Recognitions/Awards      | The Law Department recognizes pro bono work internally in three ways: (1) an annual award that recognizes one individual's outstanding pro bono contribution (both lawyers and legal staff are eligible); (2) providing ribbons to pro bono participants; and (3) discussing pro bono at all-law meetings by flagging upcoming events, identifying impactful and forward-thinking contributions of individuals, and having guest speakers present. |
| Tracking Pro Bono        | The Law Department uses Discover's internal You Care We Share volunteer program's website for tracking internal metrics, such as participation percentages, hours volunteered, and impact.   |
| Partnerships             | The Law Department partners with outside law firms, other law departments and with legal services organizations to provide pro bono services.  |
| Professional Liability   | The Law Department partners with legal services organizations that provide coverage for pro bono attorneys.  |
| Legal Staff Involvement  | Legal staff serve on the pro bono committee and participate in pro bono opportunities such as Corporate Pro Bono's <b>Clinic in a Box® program</b> , Wills for Heroes, and multiple clinics.   |
| <b>Pro Bono Projects</b> |  |
| <i>Veterans</i>          | <ul style="list-style-type: none"> <li>• <b><u>VA Financial Literacy Project</u></b>. Volunteers provide financial literacy training to veterans at the Jesse Brown VA Medical Center in Chicago.</li> <li>• <b><u>Outserve Advocacy</u></b>. Volunteers partner with Winston &amp; Strawn* to assist military veterans to correct discharge records</li> </ul>  |

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|                                 | relating to the “Don’t Ask, Don’t Tell” policy.  |
| <i>Vulnerable communities</i>   | <ul style="list-style-type: none"> <li>• <b><u>Woodlawn Legal Clinic.</u></b> This monthly legal clinic provides free services on issues relating to housing, public benefits, and domestic matters. There are on-site experts from LAF, a legal services organization, at this Chicago community legal clinic, who provide support to the pro bono volunteers.</li> <li>• <b><u>SNAP Benefits.</u></b> Volunteers assist LAF clients with obtaining or protecting Supplemental Nutrition Assistance Program (SNAP) benefits.</li> </ul> |
| <i>Criminal Justice</i>         | <ul style="list-style-type: none"> <li>• <b><u>Legal Aid Society’s (“LAS”) Communities Partnering 4 Peace (“CP4P”).</u></b> Volunteers partner with community organizations to impact Chicago communities most affected by gun violation and gang activity and provide Know Your Rights trainings, expungement and sealing assistance and fill out intake forms.</li> <li>• <b><u>Legal Aid Chicago (“LAC”) Expungement Clinic.</u></b> Volunteers prepare petitions for expungement and sealing.</li> </ul>                             |
| <i>Education</i>                | <ul style="list-style-type: none"> <li>• <b><u>Legal Prep.</u></b> Volunteers mentor students in legal advocacy courses at their school and prepare for mock trial. Volunteers assist students with building their communication skills and help foster self-confidence that we hope extends beyond the legal exercises and class.</li> <li>• <b><u>Lawyers in the Classroom.</u></b> Volunteers work with elementary school students and introduce them to constitutional law principles.</li> </ul>                                    |
| <i>Family law</i>               | <ul style="list-style-type: none"> <li>• <b><u>Rolling Meadows Domestic Violence Help Desk.</u></b> Volunteers assist victims of domestic violence with the preparation and filing of emergency orders of protection at the Rolling Meadows Courthouse in Cook County, IL. Discover developed the help desk in collaboration with the legal departments of Allstate Insurance Company** and Illinois Tool Works, Inc. and in partnership with DLA Piper*.</li> </ul>   |
| <i>People with disabilities</i> | <ul style="list-style-type: none"> <li>• <b><u>Equip for Equality.</u></b> Volunteers assist people with disabilities by answering a help-line or by participating in creating individualized education plans for students who need special education services.</li> </ul>   |

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| <i>Immigration</i>   | <ul style="list-style-type: none"> <li>• <b><u>National Immigrant Justice Center (“NIJC”)</u></b>. Volunteers assist asylum seekers with filing applications for asylum.</li> </ul>  |
| <i>First responders</i>  | <ul style="list-style-type: none"> <li>• <b><u>Wills for Heroes</u></b>. Volunteers prepare wills, powers of attorney, and health care powers of attorney for first responders.</li> </ul>   |
| <i>Nonprofits and small businesses</i>   | <ul style="list-style-type: none"> <li>• <b><u>Corporate Pro Bono Clinic in a Box® program</u></b>. Volunteers provide legal advice to Chicago-area nonprofit organizations on select topics, such as social media policies.</li> </ul>  |
| <b>Lessons Learned</b>   |  |
| <i>Success depends on all three legs of the “three-legged stool”:<br/>geography, training and support, and time commitment</i> | The three most critical components of any pro bono event, which often determine whether it is successful, are (1) geography, (2) training and support, and (3) time commitment. Each of these areas is addressed further below.  |
| <i>Geography: Provide local opportunities</i>  | Attendance at pro bono events is higher when the events are geographically convenient to where volunteers live or work. Pro bono organizers should keep in mind the geography of an event when planning pro bono engagements.  |
| <i>Training and support: Partner with law firms and legal services organizations</i>   | The training and support provided to pro bono volunteers, often by a legal services organization partner or a law firm partner, are extremely important to the success of any pro bono event. Attorneys are often providing legal assistance in areas that are outside of their normal practice and comfort zone, and need to be well-trained in order to offer pro bono legal services.                         |
| <i>Time commitment: Make bite-sized projects available</i>   | Discover has found the most success in encouraging volunteers to provide pro bono legal services when the project or representation is “bite-sized.” That is, while Law Department members do sometimes take on extended representations (e.g., an immigration case), attorneys are frequently more enthusiastic about participating in shorter, self-contained volunteer events such as clinics and help desks. |

\*denotes a **Law Firm Pro Bono Challenge®** signatory

\*\*denotes a **Corporate Pro Bono Challenge®** signatory

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