Public Interest Law Initiative
Corporate Pro Bono Roundtable
Thursday, May 19, 2016; 12:00 to 2:00 p.m.
United Airlines, Inc.
233 South Wacker Drive, Chicago, IL 60606

AGENDA

12:00 – 12:30 p.m. Welcome & Introductions – Meet your fellow in-house colleagues, talk about your own pro bono efforts and hear about their pro bono successes and challenges.

12:30 – 1:45 p.m. Information and Idea Exchange – Discussion leaders will prompt conversation on corporate pro bono by talking about their own experience and inviting you to share your own insights, questions and ideas on the below issues:

- Thinking creatively to build effective partnerships with agencies with limited support resources;
- Inspiring and celebrating pro bono participation;
- Developing half-day or daylong discrete pro bono opportunities; and
- Building or reinvigorating a pro bono program.

1:45 – 2:00 p.m. Other Ideas and Discussion

ADJOURN
2016 Corporate Pro Bono Roundtable

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May 19, 2016
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Selections from the PILI Pro Bono Reference Guide: A Resource for Corporate Programs

View the reference guide on the PILI website at www.pili.org/resources/pro-bono-reference-guides, or contact PILI Program Manager Katie Pieper for a printed copy at 312-832-5128 or kpieper@pili.org.

Special Considerations for Corporations in Designing a Pro Bono Program

Much of what is written about successful pro bono programs comes from the marketing departments of large law firms. While there is no question that these firms have served as influential leaders of the pro bono movement, corporations also have a proud history of commitment to pro bono legal services. There are, however, unique challenges faced by corporations in establishing and growing a successful program.

I. The Blank Slate Problem

Usually, if you are starting a pro bono program, you are faced with a blank slate. No program is on the books and whatever pro bono work that has been done by your corporation’s lawyers in the past may not have been well coordinated or documented. Fortunately, PILI can provide you with forms and advice like this Guide, as well as introductions to legal aid agencies and corporate pro bono coordinators, to help get you started.

II. The Resource Challenge and Solutions

You may hear objections from your superiors and colleagues that the company cannot “afford” a pro bono program given its limited resources. There are ways to ameliorate this concern:

- Select projects that will not require a large commitment of time or money from the corporation;
- Require the referring agency to screen matters for you and to train your lawyers in how to properly handle their matters; and/or
- Partner on matters with other corporations, law firms or legal aid agencies.

III. The Need for Sounding Boards

In-house counsel providing pro bono services frequently need a resource outside the corporation to serve as a sounding board on issues that arise during the course of pro bono representation. You should scrutinize referring agencies to ensure that they do not simply hand off matters to pro bono attorneys and leave the individual to his or her own devices. Good legal aid agencies will provide not only continuing staff support but also networks of other pro bono lawyers who can assist you with background on the process or the law, as well as advice on strategy.

You may want to consider attending PILI’s annual Corporate Pro Bono Roundtable which brings together corporate pro bono leaders from around Illinois to discuss the unique pro bono challenges facing corporate attorneys and to share best practices and strategies for successful corporate pro bono programs, as well as PILI’s Illinois Forum on Pro Bono which brings together pro bono leaders from law firms, corporations, law schools and legal aid organization to discuss pro bono challenges and share best practices.
IV.  Getting the Word Out

Because many corporations have small legal departments, it is sometimes a challenge to promote the successes of the pro bono program. Most of the agencies that refer cases will help promote news of your attorneys’ successes through awards, newsletters and their websites. PILI, as well as other bar associations and organizations, can also help to promote your program.

Objectives of a Corporate Pro Bono Program

Although your objectives might change over time as your corporation’s pro bono program evolves, it is a good idea in the initial stages of the program to identify the goals for the program and to design the program to achieve those goals. It is, after all, against those goals that the success of the program ultimately will be measured. As any business consultant will tell you, if you cannot measure it, you cannot manage it.

Common goals that corporations have set for their pro bono programs are discussed below. These goals are not mutually exclusive and most successful pro bono programs will incorporate some or all of these objectives. They are also not exhaustive. The goals set for your program are limited only by your imagination and the culture of your corporation.

I.  Satisfying Your Attorneys’ Desire to Give Back to the Community

The impetus for and goal of many pro bono programs is to provide an outlet for attorneys to give back to the community. Corporations have amazing resources and talents, and yet there are profound unmet legal needs among the poor and disadvantaged. Pro bono work can bring the two together in a way that ultimately benefits not only the participants but also society as a whole.

II.  Promoting Your Corporation and Its Image

Pro bono engagements can raise the visibility of your corporation and help burnish its reputation as a corporation that cares about its community. Pro bono efforts can enhance and complement the corporate citizenship efforts that your corporation is already undertaking. It is likely that your corporation already has identified philanthropy or community relations objectives, and that pro bono opportunities exist that match these objectives.

III. Building Stronger Relationships Within Your Corporation

Many successful pro bono programs are expressly designed to foster closer relationships between individuals and groups within the same corporation. Pro bono projects provide excellent opportunities for your attorneys as well as the non-attorney legal staff to work together on matters in ways that they might not ordinarily in the course of business.

IV. Building Stronger Relationships Between In-House and Outside Lawyers

By partnering with outside lawyers, in-house counsel can foster closer relationships with attorneys and firms with which they have existing relationships, or “test out” attorneys and firms that might be retained in the future.

V. Training Your Lawyers and Legal Staff

Pro bono programs can provide wonderful training opportunities, especially to newer lawyers or lawyers who simply wish to broaden their horizons.
Incentives to Use in Promoting Pro Bono

Aside from factoring pro bono efforts into promotion, salary increases and bonuses, there are a variety of incentives to use in promoting pro bono within your corporation. Many legal services agencies recognize their pro bono attorneys from corporate law departments that support them throughout the year, but recognition beyond that by your corporation and other agencies and programs is also an important consideration. Below are some of the possible means to promote and encourage pro bono throughout your legal department and the corporation.

I. Internal Recognition

Ideas for recognition include hosting regular receptions or luncheons to promote your corporation’s pro bono program and to celebrate the outstanding contributions of your pro bono attorneys. Such events are an excellent way to promote the pro bono program to encourage overall awareness and to increase participation. Whenever possible, consider inviting to these events representatives from the agencies with which your corporation works so that you can build a stronger relationship between your corporation and the agency. Another possibility is to develop and distribute regular pro bono newsletters detailing your pro bono program and the efforts of your attorneys and staff. Samples of such newsletters are available as part of PILI’s Pro Bono Consultations.

II. PILI Pro Bono Initiative Award and Pro Bono Recognition Roster

PILI acknowledges a single organization (law firm or corporation) each year for outstanding pro bono work in the community with its Pro Bono Initiative Award. The award is given at PILI’s Annual Awards Luncheon held in December.

PILI also recognizes the outstanding pro bono contributions of law firms and corporate law departments through the PILI Pro Bono Recognition Roster which is announced annually at its Annual Pro Bono Reception: Celebrating Pro Bono. For more information about these awards, contact PILI Executive Director, Michael Bergmann, at (312) 832-5129 or mbergmann@pili.org.

III. CBA/CBF Pro Bono and Public Service Annual Awards

Each year the Chicago Bar Foundation partners with The Chicago Bar Association to recognize exemplary attorneys in the legal community through the CBF/CBA Pro Bono and Public Service Awards.

The Pro Bono and Public Service Awards celebrate outstanding members of the legal profession who have used their talents and resources to improve access to justice for the less fortunate in our community. Six awards are presented each year at one of the signature events in the Chicago legal community, the Annual Pro Bono and Public Service Awards Luncheon. Of particular note is the Exelon Outstanding Corporate Counsel Award that recognizes a corporate attorney for his or her outstanding pro bono contributions. More information about these awards is available on the CBF website, www.chicagobarfoundation.org, or by contacting CBF Director of Pro Bono & Court Advocacy, Kelly Tautges, at (312) 554-8356 or ktautges@chicagobar.org.

IV. CBA Liberty Bell Award

Each year as part of its annual Law Week celebration, the Young Lawyers Section of The Chicago Bar Association presents the Liberty Bell Award. This award is presented to a non-lawyer who: (1) has a sense of responsibility for community welfare and public duty under the law; (2) helps others to understand and assert their rights under the law; (3) promotes and encourages respect for and obedience to the law; and (4) assists with the smooth functioning of our system of justice. For more information about this award, please contact the Young Lawyers Section at (312) 554-2031 or yls@chicagobar.org.
V. Illinois State Bar Association’s John C. McAndrews Pro Bono Service Award

The Illinois State Bar Association established the John C. McAndrews Pro Bono Service Award to honor individual members of the profession, law firms, corporations and affiliated bar associations who have shown extraordinary commitment to providing free legal services to the income-eligible or to expanding the availability of legal services to the income-eligible. Three awards are given annually; one to an individual, one to a firm or corporation and one to an affiliated bar association. For more information about the McAndrews Award, please contact Melissa Burkeholder, at mburkholder@isba.org.

VI. American Bar Association Center for Pro Bono

The Standing Committee on Pro Bono and Public Service presents awards annually to individual lawyers and institutions in the legal profession who have demonstrated outstanding commitment to volunteer legal services for the poor and disadvantaged. The awards are presented at the Pro Bono Publico Awards Assembly Luncheon during the ABA Annual Meeting, typically held in August. The Pro Bono Publico Awards program seeks to identify and honor individual lawyers and small and large law firms, government attorney offices, corporate legal departments and other institutions in the legal profession that have enhanced the human dignity of others by improving or delivering volunteer legal services to our nation's poor and disadvantaged. More information about the awards and other ABA awards can be found on the Center’s website at www.abanet.org/legalservices/probono/nav_awards. Additional information regarding the ABA Center for Pro Bono is also included in Section 6 of this Guide.

VIII. National Legal Aid and Defender Association (NLADA)

Each year at its annual dinner, NLADA honors one or more members of the private bar or corporate community who have demonstrated outstanding leadership in promoting and supporting equal justice with the National Exemplar Awards. In addition, the Charles Dorsey Award is given biennially to an individual who has provided extraordinary and dedicated service to the equal justice community and to organizations that promote expanding and improving access to justice for low-income people. To be eligible to receive this award, an individual must have demonstrated a commitment to equal justice for all through service as an officer, board or committee member of a national or statewide organization devoted to fulfilling the promise of equal justice. More information about NLADA’s awards can be found on its website at www.nlada.org/About/About_Awards.

IX. Pro Bono Institute Awards

The Pro Bono Institute recognizes the pro bono contributions of individuals and organizations through several different awards. The Laurie D. Zelon Pro Bono Award is given each year to an individual or organization that has provided exemplary pro bono service. The Pro Bono Institute’s Chesterfield Smith Award recognizes extraordinary courage and commitment to pro bono by a legal leader. This award is only given when warranted by outstanding achievement. For more information about the Pro Bono Institute and its awards, please visit its website at www.probonoinst.org or contact the Pro Bono Institute President and Chief Executive Officer, Eve Runyon, at erunyon@probonoinst.org, or (202) 729-6699.

X. Corporate Pro Bono Awards

Each year, Corporate Pro Bono (CPBO) presents the CPBO Pro Bono Partner Award in honor of innovative team approaches to pro bono work involving in-house legal departments. The award is presented in the fall at the Pro Bono Institute’s Annual Dinner. Winners are widely publicized in PBI and CPBO publications. Recipients of the award are comprised of at least one legal department and one or more firms and/or public interest group partners. To learn more about CPBO and its award, please visit its website at www.cpbo.org, or contact the Pro Bono Institute President and Chief Executive Officer, Eve Runyon, at erunyon@probonoinst.org, or (202) 729-6699.
Teaming your in-house lawyers with law firm lawyers can do in the pro bono context exactly what it does in the paid context – bring out the best in everyone involved. It can enhance service to the most disadvantaged members of the community by combining talent, experience, legal knowledge and skills of each member of a client team. This can result in a product that makes everyone better for the experience – the pro bono client, the in-house counsel and the law firm lawyer. Getting these projects started can be a challenge, though. Creating teams of law firms, corporate legal departments and public interest agencies is not right for every project, agency, firm, company or social justice issue. However, when all the pieces are carefully considered and fine-tuned for the delicate balance of a three-way partnership on the right project, the result can be fantastic: first class legal services to the community and to individual clients.

I. Basic Principles

- **Treat it like any other client engagement**
  As with any pro bono client, the pro bono client of a law firm/corporate counsel partnership deserves and requires the best practices and first-class legal services of all attorneys involved. Anything less would be irresponsible and could endanger the outcome of the matter.

- **Be prepared for significant work on the front end**
  Teaming requires a lot of work up-front to assure that every detail is in place before the actual legal representation begins. New players, logistics, roles, relationship and responsibilities require much more up front work than initiating a regular pro bono project. The three partners may have to get to know each other in new ways to start a teaming project together – no matter how deep or long the relationship has been among the entities on other matters. If everyone is prepared for the initial investment of time and energy, the result can be well worth the investment.

- **Start small**
  Give attorneys a positive taste of the work and they will make stronger future investments. Small projects are also conducive to quick successes which are essential to sustain a pro bono commitment of any kind. A legal aid agency is usually in the best position to design and advice on what “bite-sized” projects will best serve the low-income population. There is always room to grow.

- **Teaming Projects require many of the same elements of any pro bono project:**
  - Pro bono projects require management support at every level of each of the three organizations who are forming the team: agency, firm and company;
  - A strong project needs professionals who have time to dedicate to making this a success in each of the three partner organizations;
  - The commitment must be based on a genuine interest in service and social justice – not marketing or public relations for one or all of the organizations; and
  - Lawyer volunteers – like all volunteers - need to feel appreciated for their service. This means that seemingly unimportant things like giveaways, kick-off events, and end of the year appreciation ceremonies can go a long way to fortifying a fledgling project.

II. Choose the Partners and Activity Carefully

- **The right legal aid agency can make or break a teeming project**
Though many agencies have fantastic reputations for the good work they do for the community, they may not all be well-equipped to run a teaming project at a particular time. Give careful thought to the agency that can best provide:

- well-screened clients;
- fine-tuned training in the best format; and
- appropriate levels of mentoring for a particular project.

**Some legal aid needs are not best met in team projects**
What may work inside a firm or corporation alone may not be as conducive to partnering on the project. Think through each stage of the matter selected and consider whether they will all be accomplished well with this broader team. This does not automatically limit firm-corporate teaming to just one-stop intake clinics, but it does require consideration of how each stage of a pro bono matter will:

- be divided with clear lines of responsibility among inside and outside counsel;
- best utilize expertise and interest of each lawyer on the team;
- efficiently proceed in the time frame all parties have agreed to;
- effectively meet the needs of the pro bono client; and
- require appropriate levels of flexibility if conditions change.

**Carefully consider the scope of the assignment**
Lack of clarity about how much is expected of the team or an agreement to provide more service than is reasonable can cause a failed effort where success was possible. Consider and carefully agree to the scope of a project with all three parties to the teaming project before the work starts. Responsibilities should be divided among all parties at the beginning of each engagement. Consider whether one of the parties should be assigned overall responsibility for managing the matter and the other parties.

**Feedback is everything**
Check in early and often to assure that the project you have selected and the process that has been designed is working. Problems will arise but the sooner they are brought to the attention of people who can address them, the less impact they will have.

### III. Preparation is Essential

Before you join forces with a firm for a project, it is important to consider what resources your company has and to what extent your corporation could be engaged in the project independently. This may aid in developing a project proposal that addresses all the concerns or lack of resources your legal department may face in starting a pro bono project. Potential areas of concern to address with a pro bono partner may be:

- **Lack of infrastructure for service to a pro bono client**
  No matter how committed your corporation or general counsel’s office may be to providing service to the community, you may not have the infrastructure in place internally for pro bono work.

- **Administrative barriers can be a powerful disincentive**
  Lack of a formal conflicts system, limited malpractice insurance, and limited ability to apply staff resources to a new project are all frequently cited administrative barriers to in-house pro bono activity. Many of these challenges can only be solved through a well-structured partnership. For example, a simple solution for insurance coverage may be to take matters only from public interest agencies with pro bono malpractice insurance that covers all volunteers. Identifying these problems gets you more than halfway to solving them.
• In-house counsel may not be members of the state bar where they work
  No lawyer wants the result of his “good deed” volunteering to be an investigation by the disciplinary commission for unauthorized practice of law. Merely the idea of professional responsibility implications like this one can discourage your volunteer attorneys from engaging in otherwise well-organized, bite-sized projects matched to their skills, time and interest. As discussed previously in Section 2, the Illinois Supreme Court recently amended Supreme Court Rule 756 to allow corporate counsel with limited admissions status to do pro bono work under certain circumstances.

• Lawyers worry whether they are qualified to provide the best service
  Your volunteer attorneys may worry that a pro bono project will be out of their area of expertise. After all, wouldn’t the pro bono client be better off with someone who does this work all the time? The answer is that there is a pro bono project for every skill set and lawyers can become qualified to provide first class service in most areas of public interest law practice with the right level of mentoring, training and time. The key is finding the right balance.

IV. Select and Build the Right Structure

Pitfalls can be avoided with creative and careful thought to the ideal structure of a project. Here are some additional thoughts for avoiding the pitfalls and developing the right structure:

• Training, as in any pro bono project, is essential
  Not only does training equip lawyers in what might be a new field of practice, it has the significant impact of making your volunteers feel confident that they can serve the client effectively. Trainings should be planned well in advance with materials reviewed by a representative from each organization.

• Identify specific roles early and reconfirm often
  All participants should know what is expected of them and which members of the team has responsibility for which tasks. Whether it is contact with the client, filing documents, or attending a hearing, every volunteer should know who will handle what before all work begins.

• Communication must be streamlined
  Each volunteer should know the point of contact to reach for a specific issue. The law firm lawyers can serve as liaison between the agency and your legal department if an agency has never run a project with your company before. Sometimes communication with the pro bono client should be handled by only one person to avoid the client’s confusion about whom to go to for what. Whatever model is followed, it should be carefully chosen and communicated before the work begins.
Launched in 2006, the Corporate Pro Bono Challenge® initiative enables legal departments to identify, benchmark, and communicate their support for pro bono service. The initiative is now the standard for in-house pro bono. [www.cpbo.org/challenge](http://www.cpbo.org/challenge)

**Signatory Snapshot**

CPBO Challenge® signatories range in size, industry, and geography, but their chief legal officers all recognize the critical need for in-house pro bono service.

- **144** SIGNATORIES
- **REPRESENTING** 36 INDUSTRY SUBSECTORS
- **ENGAGED ACROSS** 44 COUNTRIES

**A Challenge Ten Years in the Making**

In the 10 years since its launch, the CPBO Challenge® initiative has grown to more than 145 signatories.

**Industry to Industry**

Average participation rate of U.S. lawyers by industry sector:

- Finance & Insurance: 44% (n=11)
- Information: 38% (n=5)
- Manufacturing: 45% (n=17)
- Retail Trade: 69% (n=6)
- Utilities and Mining: 55% (n=4)
- Other: 47% (n=7)

**No Department Too Small, or Too Large**

Average participation rate of U.S. lawyers by department size:

- 1-25 attorneys: 23% (n=7)
- 26-50 attorneys: 42% (n=7)
- 51-100 attorneys: 33% (n=10)
- 101-200 attorneys: 53% (n=9)
- 201-500 attorneys: 50% (n=12)
- >500 attorneys: 86% (n=5)

**Meeting the Challenge Goal**

- 50% PARTICIPATION ASPIRATIONAL GOAL

[CPBO Challenge® 2014 Report](http://www.cpbo.org)
CPBO Challenge® Signatories (as of March 16, 2016)

3M Company†
Abbott Laboratories†
Accenture plc†
Adventist Health System†
AECOM
Aetna Inc.†
Agilent Technologies, Inc.†
Alaska Airlines, Inc.
Allstate Insurance Company†
Altria Group, Inc.†
American Airlines Group Inc.†
American Electric Power Company, Inc.†
American International Group, Inc.†
AOL Inc.†
Aon Corporation†
Arch-Daniels-Midland Company
Arena Pharmaceuticals, Inc.†
Armstrong World Industries, Inc.†
ARS National Services Inc.†
Association of Corporate Counsel†
Assurant, Inc.
AT&T Inc.†
Automated Financial Systems, Inc.†
Bank of America Corporation†
The Bank of New York Mellon Corporation
Best Buy Co., Inc.†
BlueCross BlueShield of Tennessee, Inc.†
Boehringer Ingelheim Corporation†
Boston Scientific Corporation
Bristol-Myers Squibb Company†
CA, Inc.†
Capital One Financial Corporation
Cardinal Health, Inc.†
Caterpillar Inc.†
CBRE Group, Inc.
CBS Corporation†
Churchill Downs Incorporated
CIGNA Corporation†
Cisco Systems, Inc.
Citigroup Inc.†
The Clorox Company†
The Coca-Cola Company†
Computer Sciences Corporation†
Computer Systems Center Incorporated (CSCI)†
Counsel on Call†
Cox Communications, Inc.†
Deere & Company†
Dell Inc.†
Deloitte†
DHL Express (USA), Inc.
Direct Supply, Inc.
Discover Financial Services
DreamWorks Animation SKG, Inc.
Duke Energy Corporation†
DuPont
Duquesne Light Company
Entergy Corporation
Exelon Corporation†
FactSet Research Systems Inc.
Federal Home Loan Mortgage Corporation (Freddie Mac)
Federal National Mortgage Association (Fannie Mae)†
Federal Reserve Bank of New York†
FedEx Ground Package System, Inc.
The Finish Line, Inc.†
Fisher Healthcare†
Ford Motor Company†
The Gap, Inc.†
General Electric Company†
General Mills, Inc.
General Motors Company†
Golden State Foods Corp.†
Hasbro, Inc.†
Hertz Global Holdings, Inc.
Hewlett Packard Enterprise Company†
Hyatt Hotels Corporation
Intel Corporation†
International Paper Company†
J.C. Penney Company, Inc.†
Johnson & Johnson†
Johnson’s Tire Service LLC
Kaplan, Inc.†
LexisNexis Group†
LMIC Logistics Management Institute)*†
LyondellBasell Industries N.V.
Marathon Oil Corporation†
Marsh & McLennan Companies, Inc.†
Massachusetts Mutual Life Insurance Company
Mayo Clinic†
McDonald’s Corporation†
Medtronic, Inc.
Merck & Co., Inc.†
Merrill, Life, Inc.†
Microsoft Corporation†
MillerCoors LLC†
MSA Safety Inc.
National Life Insurance Company (National Life Group)†
Nationwide Mutual Insurance Company†
The New York Times Company†
Office Depot, Inc.†
The Pep Boys-Manny, Moe & Jack†
PepsiCo, Inc.†
PETCO Animal Supplies, Inc.†
Pfizer Inc.†
The PNC Financial Services Group, Inc.
PPG Industries, Inc.†
Prudential Financial, Inc.
Qualcomm Incorporated
Rick Engineering Company†
Royal Bank of Canada†
salesforce.com, inc.
Shell Oil Company†
SIMNSA Co†
Starbucks Corporation†
Stanwood Hotels & Resorts Worldwide, Inc.†
State Volunteer Mutual Insurance Company
Symantec Corporation†
SYNNEX Corporation†
Synopsys, Inc.†
Target Corporation
TE Connectivity Ltd.
Thomson Reuters Corporation†
TIAA†
The Toro Company†
TXU Energy†
Tyson Foods, Inc.†
U.S. Bancorp†
United Continental Holdings, Inc.†
United Parcel Service, Inc.†
United Technologies Corporation†
UnitedHealth Group Incorporated†
The Vanderbilt University†
Verizon Communications Inc.†
Viacom Inc.
Vulcan Inc.†
Wal-Mart Stores, Inc.†
Walgreens Boots Alliance, Inc.
The Washington Post Company†
West Monroe Partners, LLC
The Williams Companies, Inc.†
Willis Towers Watson
WPX Energy, Inc.
Xerox Corporation
Yahoo Inc.

* indicates Charter signatory
† indicates Challenge 100 signatory

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www.cpbo.org
Interest in global pro bono has continued to grow among legal departments. In support, PBI and CPBO have developed resources to further advancements in pro bono around the globe.

2015 Global Pro Bono Survey

The Global Pro Bono Survey, developed by Latham & Watkins in partnership with PBI, serves as an essential reference document, providing guidance on the pro bono landscape in more than 80 countries.

According to the 2014 CPBO Benchmarking Report, responding departments with global pro bono programs provided assistance through a variety of projects.

84 jurisdictions

Where are In-House Counsel Engaging in Pro Bono?

In-house counsel are engaged in pro bono services that impact the lives of individuals and organizations in a number of countries around the world, including those indicated on the map below. In 2014, CPBO supported the efforts of legal departments engaged in pro bono across 44 countries.