

**LAWYERS FOR COMMUNITY CHANGE:
AN INTRODUCTION TO BUSINESS LAW PRO BONO**

**Friday, April 16, 2004
Atlanta Hilton**

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|---|----------------------|----------------|
| I. Opening Plenary
(WSR 111) | 7:30-8:45 am | Henry |
| II. Starting Up a Program
(WSR 113) | 8:45-10:15 am | Walton |
| III. Identifying Clients & Clients Needs
(WSR 114) | 10:30-Noon | Clayton |
| IV. Resources & Best Practices
(WSR 115) | 1:45-3:15 pm | Clayton |
| V. Closing Plenary
(WSR 112) | 3:30-5:00 pm | Salon A |

ABA/ NLADA 2004 Equal Justice Conference
Friday, April 16, 2004 Atlanta Hilton
7:30-8:45 AM

Lawyers for Community Change WSR 111
Opening Plenary: Introduction to Business Law Pro Bono

Moderator

Peter H. Carson
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Brief Description:

Business lawyers are not often perceived as agents for community change. Join us in this opening session to learn how the ABA Business Law Section has committed to change that misperception. Learn how volunteer attorneys from major USA corporations are volunteering their legal skills to work with community groups. Learn from community groups what benefits they have received from these lawyers. Learn why law firms rely upon pro bono providers to refer community-based organizations.

Topical Outline:

- I. Welcome – Peter H. Carson, Vice Chair of Pro Bono Committee of the ABA Business Law Section
 - a. Overview and Introduction of plenary

- II. “A Business Commitment: Across the USA” – 8 minute video highlighting programs around the country
 - a. Narrated video will visit Los Angeles, San Francisco, New York, Atlanta & Detroit
 - b. CD will be available on the abc website

- III. Introduction of Steve Weise, Chair of ABA Business Law Section – Peter Carson
 - a. Why Section supports Pro Bono
 - b. Why Section recognizes value in National Public Service Award
 - i. Acknowledge Sutherland Asbill – Knox Dobbins
 - c. ABC Manual and website
 - d. Opportunities for volunteer business lawyers – both in-house and in firms to use their business legal skills
 - e. Connection to the community and community based groups(10/15 minutes)

- IV. Introduction of speakers – Peter Carson
 - a. Volunteer Attorney – Todd Grice
 - i. Why volunteer
 - ii. What practice area
 - iii. What business skills used with community based group
 - iv. What satisfaction(12 minutes)

 - b. Client – Carrie Salvray
 - i. What is TPCDC?
 - ii. Why did TPCDC need a business lawyer?
 - iii. What is relationship with volunteer atty?
 - iv. How has TPCDC benefited?(12 minutes)

 - c. In-house – Lucy Helm
 - i. How has Starbucks been “Breaking grounds?”
 - ii. Why Annual Report for Social Responsibility?
 - iii. What can in-house do?
 - iv. What are benefits for in-house staff?(12 minutes)

 - d. Pro Bono Director Law Firm – Carolyn Rosenthal
 - i. How does business pro bono benefit the business lawyers?
 - ii. How does an “intermediary” assist the firm?
 - iii. “Open for Business Workshop” – other ways to do pro bono
 - iv. Bottom line for firm(12 minutes)

Notes: The objective of the opening plenary is to introduce the audience to business law pro bono by putting a “face” and human story on those who are involved

Biographies

Peter Carson is a partner in the Bingham McCutchen's San Francisco office where he carries on a leveraged and corporate finance practice focused on representing banks, commercial finance lenders, debt funds and other institutional lenders as well as the firm's company and private equity clients in all aspects of complex debt and equity financings. Peter also is the vice-chair of Pro Bono Committee of the ABA's Business Law Section, is on the boards or steering committees of several public interest and legal service organizations, including the boards of Earthjustice Legal Defense Fund and Bay Area Legal Aid.

Todd Grice is Technical and Supply Chain Counsel for The Coca-Cola Company. Prior to joining The Coca-Cola Company, Mr. Grice served as Assistant General Counsel of NIBCO Inc., located in Elkhart, IN, and as an associate at Dinsmore & Shohl LLP, located in Cincinnati, OH. Mr. Grice is member of the Indiana and Ohio bars and the Business and International Law sections of American Bar Association.

Lucy Helm is the Assistant General Counsel of Seattle based Starbucks Co.

Carolyn Rosenthal is the Pro Bono Manager of the Boston based law firm Goodwin Procter.

Carrie Salvary is the Executive Director of the Tyler Place CDC in Atlanta.

Steve Weise practices in all areas of commercial law in the Los Angeles office of Heller Ehrman White & McAuliffe. Steve is Chair of the Business Law Section of the American Bar Association. Steve is a member of the Permanent Editorial Board for the Uniform Commercial Code and is the American Bar Association's Representative to the UN Commission on International Trade Law's Working Group on Security Interests. He was the American Bar Association's Advisor to the Uniform Commercial Code Article 9 Drafting Committee, a past chair of the Business Law Section's Personal Property Secured Financing Committee, and a past chair of the Business Law Section's Committee on Legal Opinions.

ABA/ NLADA 2004 Equal Justice Conference
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3:30 – 5:00 PM

Closing Plenary Recap on Business Law Pro Bono Issues WSR 112
Moderators

Allen Bromberger
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Guy Lescault
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Presenters:

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Brief Description:

Wrap-up session to hear what lessons were learned and what best practices were identified to bench mark. To conclude the 5 sessions on “Lawyers for Community Change” Bill Kelly, a volunteer lawyer, who helped start and chairs a business pro bono program will share his insights and experiences. Through his commitment and dedication to the DC Community, Kelly was recognized by the ABA Business Law Section as the 2000 National Public Service Award recipient for exemplifying a volunteer business lawyer working for community change.

Topical Outline:

- I. Recap on Starting Up a Program – Kathleen Hopkins, Moderator (15 minutes)
 - a. Variety of examples
 - b. WAACO story
 - c. Minnesota Bar

- II. Recap on Identifying Clients & Clients Needs – Allen Bromberger, Moderator (15 minutes)
 - a. Variety of tools and methods
 - b. Landscape driven

- III. Recap on Resources & Best Practices – Guy Lescault, Moderator (15 minutes)
 - a. National resources – peer review
 - b. Technological resources – national practice area
 - c. Financial Resource developemnt plan
 - d. How adopted at local level

- IV. Introduction of Bill Kelly – Kathleen Hopkins, Chair (30 minutes)
 - a. Volunteer Attorney
 - b. Client engagement
 - c. Chair of provider organization
 - d. Benefits as a professional

Notes: The objective of the closing plenary is to recap the issues identified in the sessions and benchmark the best practices presented.

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Identifying Clients & Client Needs WSR 114

Moderator

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Presenters:

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Brief Description:

One of the challenges reported by many transactional pro bono programs is the need to have a steady stream of good clients with good projects for volunteers to handle. Doing this well is one of the things that distinguishes excellent programs from mediocre ones. This session brings together seasoned professionals to discuss how you can connect to groups that are making a real difference in your community, and find projects that have real impact. Panelists will discuss various kinds of outreach techniques, intake criteria and proven screening procedures that will enable you to handle this critical function effectively.

Topical Outline:

- I. Welcome – Allen Bromberger, President of Power of Attorney
 - a. Introductions
- II. Outreach in an urban area – Sue Kaplan
- III. Outreach in rural statewide area – Mike Monahan
- IV. Outreach in both urban/rural – Angie Zemboy

Notes: The objective of this session is to learn how urban and rural providers have developed outreach techniques to identify clients needs.

Biographies:

Allen Bromberger is President of New York City based Power of Attorney.
<http://www.powerofattorney.org/>

Susan Kaplan is the Director of the Community Economic Development Law Project, a pro bono law program providing legal counsel to community based organizations involved in community economic development and low-income housing development in distressed areas of the city. Susan is a 1976 graduate of DePaul University College of Law. She has been the Director of the Law Project since its inception in 1985.
<http://www.clccrul.org/CEDLP.htm>

Michael Monahan is the Pro Bono Director of the State Bar of Georgia. He serves as staff counsel to A Business Commitment Committee and the Access to Justice Committees of the State Bar. A veteran legal services advocate, Mike previously served as Director of the Georgia Legal Services Program Farmworkers Project.
<http://www.abc-georgia.org/>

Angela Zemboy directs Community Legal Resources in Detroit. She has over 12 years experience working in Detroit's community development industry as an urban planner, researcher and community organizer. A non-lawyer, Angela holds a Master of Urban Planning degree from Wayne State University. <http://www.clronline.org/>

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Starting Up A Program WSR 113

Moderator

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Brief Description:

The different ways new transactional pro bono programs have started have been as varied as the programs' clients. For this program we have pulled together individuals from programs that have had very different catalysts: in-house counsel, private law firms, bar associations, LSC and "ad hoc" groups. These panelists will demonstrate how you can start a transactional pro bono program in your community and, through their war stories, how to overcome some of the obstacles to your success.

Topical Outline:

- I. Welcome & Introduction of presenters – Kathleen
 - a. Objective of workshop is to show the variety of business law pro bono entities and how they developed in response to their landscape.

- II. Texas C-Bar – D'Ann Johnson Staff Attorney (15 minutes)
 - a. How program was started in LSC funded program by Skadden Fellow
 - b. How program has grown and expanded to cover the State of TX
 - c. What non-profits are served and how are they qualified
 - d. How volunteers are recruited
 - e. What lessons were learned

- III. CED Project of DC Bar – Deborah Austin (15 minutes)
 - a. How program was started within DC Bar
 - b. ABC Model Pilot Project
 - c. How clients were initially matched with law firms
 - d. Legal clinics
 - e. What lessons learned

- IV. Pro Bono Partnership – Ivan Fong (15 minutes)
 - a. How program was started by Metropolitan Corporate Counsel
 - b. NY/CT corporate in-house
 - c. Advantage of in-house staff
 - d. NJ corporate in-house
 - e. What lessons learned

- V. Philadelphia Law Works – Stephen Buvel (15 minutes)
 - a. What organizations were involved
 - b. What problems were encountered
 - c. What issues were resolved
 - d. How are clients matched with volunteers
 - e. What lessons were learned

- VI. Interactive wrap-up moderated by Kathleen

Bibliographies:

Deborah M. Austin is director of the Community Economic Development (“CED”) Pro Bono Project, a project of the D.C. Bar Pro Bono Program. In that capacity she links non-profit organizations, engaged in a range of community revitalization and neighborhood development projects with corporate, business, tax and transactional attorneys from law firms in Washington, D.C. Ms. Austin also provides technical assistance to attorneys and client organizations on a wide range of community development issues, including affordable housing finance, tax-exempt entity formation, and profit/non-profit joint ventures. Ms. Austin serves as pro bono counsel to national non-profit whose mission is to funnel equity into businesses in distressed communities and underserved markets. <http://www.dcbbar.org/probono>

Stephen J. Buvel is the legal director of the Community Economic Development Unit of Community Legal Services, a non-LSC grantee legal services provider, located in Philadelphia, PA. <http://www.phillyvip.org>

Ivan M. Fong is Senior Counsel at General Electric Co. in Fairfield, CT. Mr. Fong currently serves on the ABA Pro Bono Committee and the Board of Pro Bono Partnership. <http://www.probonopartnership.org>

Kathleen Hopkins is the Chair of the Pro Bono Committee of the ABA Business Law Section. She also is currently serving on the ABA Pro Bono Committee. Kathleen practices law with the Real Property Group in Seattle, WA. <http://www.abanet.org/buslaw/committees>

D’Ann Johnson is a legal services coordinator at Texas Community Building with Attorney Resources located in the Austin, TX offices of LSC funded Texas Rural Legal Assistance.. <http://www.texasbar.org/>

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Resources & Best Practices WSR 115

Moderator

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Brief Description:

Learn what national resources are available to grow new and existing business pro bono programs. This session will highlight the range of resources, whether it be peer visits, on-line toolbox of forms, national community development/non-profit law support site, all are available to assist in the growth and development of your pro bono program. Panelists of program directors will also discuss how they have used these resources to set "benchmarks" of best practices in their programs.

Topical Outline:

- I. Welcome & Introduction of presenters – Guy Lescault
 - a. Objective of workshop show the depth of national resources available and how some entities have used these resources to develop their own best practices

- II. ABA Center for Pro Bono – Dina Merrell (10 min)
 - a. **The Center for Pro Bono** is a national support and resource center providing technical assistance and means for encouraging pro bono activity to pro bono programs, bar associations, law schools and other segments of the legal profession. The Center also produces a number of publications, maintains a national Clearinghouse of materials on a wide range of pro bono topics and operates the Peer Consulting Project

For more information about the Center, visit www.abaprobono.org

A Business Commitment

A project of the ABA Business Law Section's Pro Bono Committee, ABC provides assistance and support to state and local bars interested in creating or expanding business law pro bono projects.

To promote the development of local and state based Business Law Pro Bono projects, ABC published a "How To" manual, [**The ABC Manual: Starting and Operating a Business Law Pro Bono Project**](#)

To help locate entities that either support the growth and development of business law pro bono projects; provide technical assistance to enable the development of local projects; or provide direct business law pro bono services, ABC has developed a [**Pro Bono Online Searchable Support Directory**](#)

To assist in the administrative development of Business Law Pro Bono projects, ABC has created a [**Pro Bono Online Searchable Toolbox of Sample Operating Forms**](#)

Power of Attorney

POA's mission is to harness the power of America's business lawyers to support the nonprofit sector by donating free legal services to worthwhile organizations that cannot afford to purchase such services in the marketplace.

Other resources listed at:

<http://www.abanet.org/legalservices/probono/business-ced.html>

<http://www.buslaw.org/cgi-bin/controlpanel.cgi?committee=CL600000>

<http://www.powerofattorney.org/>

Center for Pro Bono Clearinghouse Library

The Center for Pro Bono maintains an extensive Pro Bono Clearinghouse Library of over 4,000 documents (articles, reports, studies and news clippings) pertaining to pro bono related matters with a focus on pro bono program management. The Clearinghouse Library also contains a collection of articles and other materials pertaining to business law pro bono. Each document is summarized and recorded in the Clearinghouse database, which is now searchable (using a classification system or an "any word" search) from the web at <http://www.abanet.org/legalservices/probono/clearinghouselibrary.html> (or through the Center's homepage at www.abaprobono.org).

On site peer consultations

For over ten years, the ABA Center for Pro Bono has provided in-depth technical assistance, planning advice and support to organizations and communities interested in the development and improvement of organized pro bono.

Since its creation, the Peer Consulting Project has visited a variety of entities, including bar associations, legal services Private Attorney Involvement programs, law schools, business law pro bono programs and other groups activating or expanding pro bono programs. Utilizing the services of over 100 volunteers and visiting over 75 programs, the Center has gained valuable insight into the traits of successful programs, and common problems that trouble many others.

The Project operates as follows:

At the invitation of a pro bono program, the Center sponsors (free of cost) a team of volunteer consultants and Center staff (the “Team”) to conduct a visit to the program.

Typically, the Team reviews extensive documentation about the pro bono program’s operations and then travels to meet with program staff, local bar leaders, volunteers, other organizations providing legal assistance to low-income persons, the judiciary, and others in order to develop a full picture of the program’s operations.

After the conclusion of the visit, the Team normally provides the program with a confidential written report that sets out areas of strength, areas of challenge, and recommendations to further strengthen the program.

The Team’s recommendations are voluntary and it is up to the program visited as to whether it wants to pursue specific recommendations contained within the report.

Center staff stays in touch with program staff and provides follow-up technical assistance as needed.

For more information about the Peer Consulting Project, please contact the Project’s Administrator, Cheryl Zalenski at 312/988-5770 or zalenskc@staff.abanet.org.

- II. CLR Strategic Planning – Sally Schwartz (10 min)
 - a. Resource Development a critical need for new and existing programs
 - b. Consultant to develop a financial plan
 - c. Evaluation of plan as tool to guide Board in making resource decisions.

- III. Pro Bono Net – Michael Hertz (10 min)
 - a. Community development/non-profit law practice
 - b. Existing practice areas around the country
 - c. Proposed expansion plan

- IV. Georgia ABC – Michael Monahan (10 min)
 - a. Abc-georgia.org
 - b. Use platform to place cases with volunteers
 - c. Communication

- V. CLR Intake process – Angie Zemboy (10 min)
 - a. Process developed
 - b. Forms used & follow-up

- VI. CED Project – Sue Kaplan (10 min)
 - a. Client Outreach
 - b. Educational training programs

Biographies:

Michael Hertz is President of New York City based ProBono.Net

<http://www.probono.net/>

Susan Kaplan is the Director of the Community Economic Development Law Project, a pro bono law program providing legal counsel to community based organizations involved in community economic development and low-income housing development in distressed areas of the city. Susan is a 1976 graduate of DePaul University College of Law. She has been the Director of the Law Project since its inception in 1985.

<http://www.clecrul.org/CEDLP.htm>

Guy Lescault is Director of A Business Commitment (ABC) the Pro Bono Project of the Business Law Section of the ABA. A member of the State Bar of GA, he serves on both the Access to Justice Committee and A Business Commitment Committee. Mr. Lescault has been engaged in the provision and delivery of legal services for over 30 years.

<http://www.buslaw.org/cgi-bin/controlpanel.cgi?committee=CL600000>

Dina Merrell is Director of the ABA Center for Pro Bono, a national support center providing technical assistance and means for encouraging pro bono activity to pro bono programs, bar associations, law schools and other segments of the legal profession. From 2001-2003, Dina also served as Counsel to the ABA Commission on Loan Repayment and Forgiveness. Prior to joining the ABA in 1999, she was Special Counsel to the Guardian of the Illinois Department of Children and Family Services and a Staff Attorney at Cook County Legal Assistance Foundation. Dina graduated with honors from Chicago-Kent College of Law in 1995. [Http://www.abaprobono.org](http://www.abaprobono.org)

Michael Monahan is the Pro Bono Director of the State Bar of Georgia. He serves as staff counsel to A Business Commitment Committee and the Access to Justice Committees of the State Bar. A veteran legal services advocate, Mike previously served as Director of the Georgia Legal Services Program Farmworkers Project.

<http://www.abc-georgia.org/>

Sally Schwartz began her career with Michigan Legal Services in Detroit, before practicing with a Detroit law firm and then with Ford Motor Company's Office of the General Counsel. She retired from Ford as an Assistant General Counsel, with responsibility for the legal aspects of the Company's U. S. business transactions, purchasing and real property work. She has served as Chair of the ABA Business Law Section's Pro Bono Committee, helped to found Michigan's Community Legal Resources, and is currently the Chair of its Board of Directors. <http://www.clronline.org/>

Angela Zemboy directs Community Legal Resources in Detroit. She has over 12 years experience working in Detroit's community development industry as an urban planner, researcher and community organizer. A non-lawyer, Angela holds a Master of Urban Planning degree from Wayne State University. <http://www.clronline.org/>