California Pro Bono Conference 2010

October 12, 2010 Los Angeles

California Pro Bono Best Practices Guide: Brainstorm for chapter on "Building a Successful Relationship"

1:30 PM to 2:50 PM

Moderator: David Lash, O'Melveny & Myers LLP

NEXT STEPS

PIC will synthesize the ideas generated from this session and create a draft of the chapter for the *California Pro Bono Best Practices Guide*. PIC is also seeking volunteers to staff a writing group for the chapter. Members of the writing group will continue to brainstorm the content of the chapter through a series of conference calls, as well as read and comment on drafts of the chapter. If you are interested in volunteering, please email Doan Nguyen at dnguyen@pic.org.

AGENDA

- Welcome and Goals for the Session
- Part 1: Indentifying and maintaining the right contacts at both the law firm and the organization
    - Relationship building
    - Mutual education: How do we create flow of info? What does mutual education mean?
- Part 2: Getting to know each other
- Part 3: Internal Promotions/Pitch
- Part 4: Ideas for Effective Pro Bono Training/MCLE
- Next Steps and Closing

BACKGROUND

In October 2008, the State Bar of California and the Public Interest Clearinghouse (PIC) convened the first-ever statewide California Pro Bono Summit. Participants at the Summit expressed a need to create a guide for pro bono in California – a comprehensive "how to" manual for legal services providers and law firms on the development and administration of the best possible pro bono. A working group was formed which then proposed an outline of seven chapters, spanning pre-referral issues to case closure. At the 2009 California Pro Bono Summit, participants prioritized among the list of possible chapters and decided to write the chapter on intake and referral issues first, which will become the third chapter of the larger Best Practices Guide. The Public Interest Clearinghouse staffed a group to write the chapter, including representatives from law firms, legal services providers and the State Bar of California.

PIC completed a working draft of Chapter Three prior to the Pro Bono Conference; it includes seven sections that cover the following subjects: (1) institutionalizing front-end communication; (2) qualification as pro bono; (3) initial screening by legal services providers; (4) dealing with conflicts of interest; (5) circulating opportunities; (6) acceptance of pro bono matters; and (7) clarifying expectations. **If you would like an electronic copy of Chapter Three, please email Doan at dnguyen@pic.org**. PIC also welcomes comments on the draft through an online system at www.pic.org/ProBonoGuide from October 12, 2010 through November 23, 2010.

BRIEF SUMMARY OF SESSION

Participants in this session brainstormed the contents for "Building Successful Pro Bono Relationships," the next chapter of the California Pro Bono Best Practices Guide. Participants discussed key elements for creating a successful relationship between a large law firm and nonprofit provider where no such relationship existed before, including how to identify and maintain the right contacts; starting and building the relationships; incorporating training from both sides of the relationship; and ideas for effective pro bono trainings. Participants also discussed strategies for pitching pro bono projects to law firms and provided examples of successful types of placed matters.