IN-HOUSE PRO BONO IN PRACTICE PROFILE: LIBERTY MUTUAL INSURANCE
September 2022

The Pro Bono Program at Liberty Mutual Insurance ("Liberty Mutual") serves as a natural extension of Liberty Mutual's long history of corporate philanthropy, albeit with a legal focus. Liberty Mutual's pro bono program has always had the support of the company's Chief Legal Officers, past and present, including their personal participation in pro bono matters.

The current Chief Legal Officer at Liberty Mutual, Damon Hart, takes an active role in the continuing success and encouragement of pro bono, including, for example: communications with Legal Department and legal leadership via blog posts and in meetings to encourage pro bono participation; taking time to film a welcome video for a new pro bono intranet website launched beginning of 2022; periodic check-ins with Pro Bono Co-Chairs; personally approving financial sponsorships of partner legal service organizations; actively building relationships in the community and sourcing new opportunities; and personally participating in pro bono matters (*e.g.*, handling an asylum case).

"Liberty Mutual has been recognized repeatedly as a leader among corporate legal departments in providing pro bono services to people in need. But, while the external recognition is nice, it's not the real reason why we do this work and it's not the real reward. The real reward is putting our talents to use to foster justice," said Hart. "I'm dedicated to pro bono work and intend to do all I can to keep our program vibrant and growing."

Additionally, Liberty Mutual has been fortunate to partner with non-profit organizations that are well-established and run by experienced legal aid professionals, allowing the department to focus less on the quality of the pro bono opportunities offered and more on the program's infrastructure, communications, and volunteer engagement. Creating and maintaining these relationships has been easier than the department expected, and the department is grateful to pro bono partners for their support.

The most difficult part about growing the program, inevitably, is increasing (and avoiding decreases in) employee engagement. Pro bono work can sometimes be intimidating because it may involve an unfamiliar practice area or an unpredictable time commitment. Expanding the program to include a diverse mix of opportunities that overlap with the practice areas of the Legal Department, as well as offering time-limited, on-demand opportunities, such as online legal Q&A clinics, have helped, but there is still plenty of progress to be made. The program also continues to strategize how to help employees regularly track their volunteer time.

General Program Information	
Offices with Legal Staff	Liberty Mutual is headquartered in Boston, Massachusetts. The company has over 45,000 employees across the globe and operates in all 50 states and the District of Columbia. Members of the U.S. Corporate Legal department are in 63 cities across 25 states and Washington, D.C.

Size of Legal Department	United States: 177 lawyers and 160 legal staff.
Pro Bono Leadership Structure	Lawyers and legal professionals of the Legal Department have been doing pro bono at Liberty Mutual for almost thirty years. With the help and support of senior leadership in the Legal Department, the program formalized in the early 2000s and recently underwent a "re-launch" following the creation of an internal pro bono program website. The pro bono program is currently led by two Co-Chairs who oversee the Pro Bono Committee, develop and implement operational processes, maintain and build relationships with partner organizations, and provide regular updates on the program to the Chief Legal Officer. The 15-person Pro Bono Committee is comprised of the Co-Chairs and Pro Bono Coordinators and includes attorneys and staff. Coordinator responsibilities include: managing the pro bono opportunity to which they are aligned, acting as the primary liaison between the partner legal services organization and Liberty Mutual, sending internal communications to promote relevant training, clinics, etc., soliciting volunteers, and meeting with the Committee to discuss engagement and opportunities for improvement. In addition to the Co-Chairs and Coordinators, there are three non-lawyer professionals assisting the Committee with administrative matters, facilitating internal communications, collecting metrics and other data, and maintaining the pro bono website.
Pro Bono Policy	A written pro bono policy was adopted at the beginning of 2022. The policy addresses various topics, including: • participation, including who can participate and that participation in any pro bono work is entirely voluntary; • the role of the Pro Bono Committee, which oversees the pro bono program; • malpractice insurance; • use of company resources in pro bono work; and • conflicts of interest and how to ensure that conflicts are appropriately identified and handled.
Mandatory Pro Bono	Participation in pro bono is not required of Legal Department employees. However, the written pro bono policy expressly recommends attorneys to aspire to at least 50 hours per year as provided under the American Bar Association's Model Rule 6.1.

Communications	The Co-Chairs and Pro Bono Committee oversee the communication of pro bono opportunities and trainings primarily through e-mail; however, other means have been used to reach an appropriate audience. Examples include Microsoft Teams to target a select group of interested/trained volunteers; company-wide blog posts on Liberty Mutual's intranet to recognize volunteers, discuss importance of pro bono, and share recent "wins" or impact stories; lunch & learns for in-depth discussion of the program, offerings, impact stories, and new developments; informal mentions at team huddles or recognition during the department-wide CLO call; personal recruitment by the Co-Chairs or Pro Bono Coordinators; and a recently launched pro bono website centralizing key information on contacts, timekeeping, policy, opportunities, and training resources.
Recognitions/Awards	Volunteers are recognized through the company intranet via blog posts as well as department newsletters; volunteers that enter their volunteer time are eligible to win a quarterly monetary grant to donate to non-profit organizations of their choice; those who have volunteered over 50 hours are acknowledged by the CLO in department-wide CLO calls; and external recognition of volunteers are publicized. For example: • The American Bar Association's Standing Committee on Pro Bono and Public Service has honored Liberty Mutual as a 2021 Pro Bono Leader for extraordinary pro bono services through the Massachusetts Legal Answers Online, a program of the ABA Free Legal Answers. • Massachusetts Appleseed gave its 2021 Good Apple Award to Karen Morton, the Chief Compliance Officer, in recognition of her commitment to public service, fairness, and social justice. Massachusetts Appleseed also partnered with Liberty Mutual and Boston Scientific** in creating the Homeless Youth Handbook, a detailed legal resource guide for homeless youth about their rights, responsibilities, and resources in Massachusetts. • Lawyers Clearinghouse gave its Excellence in Pro Bono Award to Liberty Mutual's Chief Legal Officer James Kelleher in 2019, describing Liberty Mutual as setting the gold standard for in-house pro bono participation. • The Citizens School within Discovering Justice in 2018 gave its Citizen Teacher of the Year award to Senior Corporate Counsel Peter Tobani, who led the Liberty Mutual team that volunteers to mentor middle-school students in preparing a

	mock appellate argument and learn about civic and justice education.
Tracking Pro Bono	The Legal Department leverages a tool used by the Company's Community Investment team to track non-legal volunteering and charitable giving to also track pro bono sign-ups and timekeeping via an internal website. All pro bono volunteers are encouraged to record their volunteer hours using this enterprise system. Liberty Mutual does not currently track the pro bono activity of the outside firms that it works with.
Partnerships	Liberty Mutual's legal professionals have a breadth and depth of skills and capabilities that align with the established pro bono opportunities, so Liberty Mutual does not regularly partner with outside firms. However, Liberty Mutual does have a history of partnering with law firms on project-based opportunities for limited scope projects and are open to partnering with firms that have greater expertise and resources with certain subject matters, like asylum matters. An example of a project-based partnership is writing the *Homeless Youth Handbook* for Massachusetts, where volunteers from Liberty Mutual and Boston Scientific wrote chapters with guidance and assistance from Massachusetts Appleseed and Baker McKenzie LLP. The Handbook is a living digital guide for homeless youth with information about their rights, responsibilities, and resources in every major aspect of life with state-specific information.
Professional Liability	With one exception, the legal service organizations with whom Liberty Mutual partners provide professional liability insurance to their volunteers. With regards to the Veterans Legal Clinic, which does not offer malpractice coverage for its volunteers, Liberty volunteers are covered by a professional liability policy purchased by Liberty to apply to all Legal Department employees who are engaged in the practice of law.
Involvement of Paralegals and Staff	Unless the pro bono opportunity absolutely requires a licensed attorney for attendance at court or other administrative hearings, all opportunities are open to the U.S. Corporate Legal Department's paralegals and staff to assist with intake, interviews, filings, and any other available facets of the project.
Pro Bono Projects	

Consumer Rights	**Fair Debt Collection "Lawyer for the Day" Clinics** (Greater Boston, MA). Working with the **Volunteer Lawyers Project** of the Boston Bar Association, volunteers join a clinic to act as a Lawyer for the Day to provide limited assistance representation to low-income debtors and creditors with civil debt collection lawsuits to ensure that people receive due process. Volunteers can represent the client in negotiations with the debt or debt buyer, or they can represent a client during their hearing. There's no requirement for continuing representation. Participating courts are Boston Municipal Court, Quincy District Court, Dorchester Municipal Court, Cambridge District Court, and Malden District Court.
Domestic Violence	**Temporary Restraining Orders for Domestic Violence Survivors** (Massachusetts). Volunteers handle case referrals from the **Women's Bar Foundation** to assist domestic violence survivors who are seeking restraining orders against their abusers.
Education rights	**EdLaw Project Case Referrals** (Massachusetts). Volunteers disrupt the school-to-prison pipeline and advocate for the rights of high-risk and special needs students to receive an education that adequately meets their learning needs. Volunteers represent students and their parents in negotiations with school districts and/or at administrative hearings on individualized education plans or disciplinary issues.
Housing / Homelessness Prevention	**Homeless Shelter Clinics** (Massachusetts). Volunteers interview low-income clients at a local homeless shelter to identify their civil legal needs during a clinic organized by **Lawyers Clearinghouse**, and often take on directly representing clients in matters relating to housing or eviction, state benefits, and other discrete matters affecting their housing security. **Massachusetts Legal Answers Online** (Massachusetts). MLAO is a virtual legal advice clinic that is part of the **ABA's Free Legal Answers** program. Low-income residents ask civil legal questions online and pro bono attorneys respond to their chosen question(s) with advice and/or resources in writing. Liberty Mutual volunteers have dedicated two hours a week to answering questions related to housing, homelessness, and eviction issues and have been answering questions since MLAO's launch in 2016. **Homeless Youth Handbook** (Massachusetts)**.** In a year-long project, Liberty Mutual volunteers partnered with **Massachusetts Appleseed**, Baker McKenzie*, and Boston Scientific to write the Massachusetts Homeless Youth Handbook to serve as an accessible and digital guide of rights, responsibilities, and resources for homeless youth.

	On an enterprise level, the issue of homelessness and particularly youth homelessness is a focus of Liberty Mutual's philanthropic efforts through its corporate foundation. Liberty Mutual supports organizations that help meet a continuum of needs – from housing to nutrition to job skills and beyond. Examples of community partnerships are Bridge Over Troubled Waters; The Home for Little Wanderers; and Horizons for Homeless Children.
Immigration	**Asylum Case Referrals** (Boston, MA; Chicago, IL; and Seattle, WA). Liberty Mutual volunteers work with a variety of organizations providing referrals for asylum cases and occasional assistance with removal proceedings through its partners at **PAIR**, **KIND (Kids in Need of Defense)**, and **NIJC (National Immigration Justice Center)**. **Citizenship Clinics** (Massachusetts). Volunteers join Citizenship Clinics organized by **Project Citizenship** to assist legal residents with their naturalization applications to become U.S. citizens.
Sealing Criminal Records	**CORI Clinics** (Massachusetts). Volunteers interview low-income clients during a clinic organized by **Lawyers Clearinghouse** to determine if they are eligible to have their minor criminal arrest records sealed from public view so potential employers, landlords, and others will not make unwarranted decisions about them. Criminal Offender Record Information (CORI) remains visible to law enforcement, but a sealed record can mean a fresh start for someone trying to find work, housing, or continue their education.
Small Business Advice	**Small Business Advice Clinics** (Massachusetts). Volunteers provide legal assistance to support small, immigrant, and/or women-owned businesses on topics ranging from entity formation, leases, contracts, intellectual property, tax-exempt status, and more through the **BizGrow Entrepreneur Clinics**, a project of the Lawyers for Civil Rights, and the CPBO **Clinic in a Box® program** organized by the Association of Corporate Counsel – Northeast Chapter.
Social Security Benefits	**Social Security Benefits Case Referrals** (Massachusetts). Volunteers represent people with disabilities whose Social Security benefits were wrongfully denied, reduced, or terminated through referrals from **De Novo** and the **Lawyers Clearinghouse**.
Teaching and Advocating for Change	**Stand Up for Your Rights** (Massachusetts). This program sponsored by **Discovering Justice** in partnership with **Citizens Schools** pairs Boston-area middle school students with attorney and paralegal volunteers to engage in civics and justice education so they can be effective participants in democracy. The students are from

	underserved, low-income schools and spend 11 weeks learning about the American justice system while preparing their own mock appellate arguments. Liberty Mutual has volunteered since 2001. **Financial Literacy Program** (Massachusetts). Volunteers in the **M. Ellen Carpenter Financial Literacy Program** in collaboration with the **Boston Bar Foundation** teach Boston high school students to make informed decisions about credit cards, banking options, and loans to avoid choices that can lead to personal bankruptcy. Liberty Mutual has volunteered since the program's inception. **Walk to the Hill for Civil Legal Aid** (Massachusetts). The **Equal Justice Coalition** (EJC) is a Boston-based organization dedicated to increasing the funding of full-time legal aid lawyers to represent low-income individuals in civil cases where there is no right to free counsel. One way that EJC accomplishes this is by sponsoring an annual "Walk to the Hill" in which lawyers and other legal professionals walk to the Massachusetts State House, find the offices of their state representative and senator, and explain why the existing funding is not sufficient to ensure fair representation of both sides or to ease the burden on the courts that must deal with unrepresented litigants.
Veterans Issues	**Veterans Legal Clinic** Volunteers partner with the Veterans Law Unit of the WilmerHale Legal Services Center of Harvard Law School (LSC) to advocate for the legal rights of veterans to ensure they have access to the care and support earned by their military service. Typical cases relate to benefits (including disability, pension and dependency and indemnity compensation benefits), access to VA healthcare, discharge upgrades and correction of military records and estate planning. Many of the clients represented by the LSC come from underserved veteran communities, including veterans with mental health needs, women veterans, and LGBTQ veterans.
Lessons Learned	
Support of legal leadership	Leadership support of pro bono increases volunteer engagement and ensures the resources necessary to develop and build a pro bono program with longevity. This support can manifest itself in a variety of ways, but the pro bono leaders found that where senior leaders themselves participate in pro bono, it can have a major impact.
Partnering with the right legal services organizations	Finding and partnering with legal services organizations, who have the resources necessary to train and support volunteers, is critical to a successful pro bono program. Volunteers, especially those that are

	participating in pro bono for the first time, need to feel supported and adequately trained.
Develop consistent and clear pro bono communications	Over the last year, Liberty Mutual has standardized its pro bono communications, so that each communication about an opportunity or training comes from the same sender and contains certain key information, including who to contact to participate, a link to track volunteer time, whether the opportunity is available to both attorneys and non-attorneys and if training is required. The consistency in content and look of these communications has made it easier for volunteers to know what volunteer opportunities are currently available and what they need to do participate.
Share success stories	Sharing pro bono success stories is an easy way to inspire colleagues to get involved in pro bono, while also giving volunteers the recognition they deserve. Liberty Mutual currently shares success stories via the pro bono intranet site, where readers can react and comment about their peers' great work.
Be mindful of the legal professionals	Most corporate legal departments are comprised predominantly of professional staff, who are just as enthusiastic about and capable of participating in pro bono as their attorney colleagues. In-house pro bono leaders should take care to offer and clearly communicate about volunteer opportunities that give staff a chance to participate.

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