I. TPIC Policies for Student Leaders of Pro Bono Groups

A. Mutual Obligations Between TPIC and Student Projects

Penn Law is proud of the vibrant array of student initiated pro bono projects that have evolved in the more than two decades since the faculty established the pro bono requirement. It is TPIC’s responsibility to oversee our student pro bono projects to ensure high quality service to the community and strong experiential learning opportunities for our students. TPIC strives to fulfill this responsibility by nurturing the entrepreneurial spirit in our student leaders, offering training, guidance, and support while empowering our student leaders to direct their project volunteers and form strong relationships with community partners. We value our work together and take our mutual obligations seriously. We hope that you understand that your pro bono projects are an extension of Penn Law School and the Toll Public Interest Center, and are therefore subject to institutional policies and procedures. Below we set forth these policies and procedures so that you may have a clearer understanding of the expectations we have for all our student leaders. Should you have any questions, or need particular guidance in any area, TPIC is here to offer individualized support. We look forward to working together to continue Penn Law’s long tradition of service.

B. Project Manuals

For any pro bono project to be an authorized TPIC pro bono project, its leaders must submit an updated project manual every year. This manual is designed not to be a burden, but to be a tool that documents the structure of the project, and that captures essential changes as they happen from year to year. This is an essential planning document that helps project leaders engage in critical thinking about their goals and the means for accomplishing those goals throughout the academic year. For example, the manual requires leaders to plan a budget, describe the work of the organization and its structure, approve rules for decision-making, and plan for board transition procedures at the end of the academic year. The purpose of the manual is to help you work through important questions and challenges that confront the leaders of a pro bono project; questions and challenges that are often quite similar to those faced by leaders of nonprofit organizations.

C. In Person Board Meetings

The board of a pro bono project must meet in person at least once per month (we encourage more regular meetings, where needed). We know this may sound challenging, but collaborative leadership is hard. Based on TPIC’s experience in working with student initiated pro bono projects, it has become clear that in-person board meetings are critical to a project’s success. In-person meetings are useful for maintaining the cohesiveness of a board, identifying and correcting problems in an organization, and planning for the organization’s future. The meetings also serve as a way to think collectively and critically about the services the project is providing to the community.

TPIC understands that it can be hard to fit regular meetings into your already hectic schedules. As such, we will make every effort to help if you encounter issues planning, scheduling, or finding space for your meetings. In addition, if TPIC staff needs to meet with the management team, we will make every effort to fold that meeting time into your already scheduled board meetings. Meetings do not need to be held during regular business hours – we are supportive of any scheduled meeting time, as long as it is convenient for all board members. To comply with this requirement, please select and confirm your monthly meeting schedule no later than Friday, September 21, 2012. Please email your meeting schedule for the semester to Joanna Visser at jvisser@law.upenn.edu. The dates will then be placed on the
master calendar in the TPIC office, and TPIC may use these meeting times as an opportunity to meet with
group boards from time to time.

D. Pro Bono Hours for Leaders

When you agree to serve as part of the management team of a pro bono organization, you commit to
carrying out a substantial amount of work for the organization as you provide services and training,
coordinate volunteers, and perform the many other tasks that are essential to an effective organization.
Members of the management team can each receive 80 blanket hours for their service. The blanket pro
bono hours are an approximation of the time you will actually spend on the project. In order for blanket
hours to be applied, you must complete and submit a leader survey, which will be provided by Joanna
Visser at the end of each semester. Once a leader survey has been submitted, you will receive 40 hours of
pro bono service for the semester (totaling 80 hours for the year).

It is strongly encouraged that you still log your hours. The blanket hours are in no way intended to
penalize leaders who legitimately exceed 80 hours of work on their project. Leaders who exceed 80 hours
may submit a log form for only the hours they worked above 80. If you intend to submit additional
hours it is particularly important that you keep accurate time records, as hours logged over the blanket
number will be verified by Joanna Visser following an in-person meeting, during which time all of the
great work you are doing will be discussed.

E. Logging Hours

The leaders of a pro bono project are responsible for signing their members’ pro bono logs and verifying
that students are accurately reporting their time to TPIC. It is imperative that you (or the leadership team
member assigned to this task) take the time to ensure the accuracy of all logs submitted by your project
members. If you are unsure as to the accuracy of time reported, it is both acceptable and encouraged for
project leaders to reach out to attorney supervisors and community partners to verify the number of hours
reported by a particular student. TPIC will also be in periodic contact with community partners to assess
the project’s work, which may include discussing the number of hours logged by volunteers. TPIC is
available to provide support whenever issues arise concerning the logging of hours.

Project members can receive hours for:

- Participating in a Penn Law Student Pro Bono Project by:
  - Providing law-related services to clients through a Penn Law Student Pro Bono Project;
  - Conducting legal research for a Penn Law Student Pro Bono Project;
- Participating in an ad hoc pro bono project by:
  - Providing law-related research or client work for a supervising attorney or legal worker
    at a public interest organization.

Project leaders, but not members, can log hours for tasks that are not strictly legal in nature, but are still
necessary to the legal services the pro bono project provides. For example, time spent organizing a
speaker event cannot be logged as pro bono hours. However, the time a project leader spends organizing
clients’ files to make other students’ services more efficient does count. Travel time also does not count
as pro bono for leaders or project members. If you are not sure if a particular activity can be counted
towards the requirement, you can check with TPIC in our office or at all-pic@law.upenn.edu.
F. Adding Leaders to Your Project’s Board

TPIC must approve adding any new positions to a pro bono project’s board, and for the first year of any new position on a board, the person in the new position will log her hours instead of receiving blanket hours.

Sometimes adding a new position to a board will distribute work more evenly or allow for efficient delegation of responsibilities. However, every new position also adds to the complexity of a board, slows down decision-making, and increases the risk of miscommunication and the challenge of keeping the organization efficient. Therefore, before adding a new position to a board, the current board is required to consult with TPIC. TPIC will help you evaluate your organization’s needs, the responsibilities the proposed new position would have, and whether adding a new position is in the best interest of the organization.

When TPIC is deciding if it will approve including a position within the management team, TPIC looks at factors including:

- The proposed benefits of adding the new position and whether the new position will address needs that are not currently being met;
- Whether the rest of the organization’s management team would be overburdened by their responsibilities if the new role did not exist;
- Whether the new role will involve law-related work or supervising the law-related work of law students; and
- Whether the new role’s responsibilities will be likely to take at least 80 hours to complete.

If TPIC agrees that creating a new position is necessary, TPIC will approve provisionally creating the position. For the first year a position exists, the new position will not receive blanket hours. Instead, the person in the new position will need to log her hours. At the end of the year, your board and TPIC will evaluate the new position and decide if it is in the best interest of the organization to make it a permanent position that will receive blanket hours.

Remember that TPIC works with all 26 pro bono projects, and has experience with every conceivable board structure. We can help you benefit from the lessons learned by other projects, and can offer suggestions for the most efficient and effective structures for your particular project. Our goal is to ensure strong management, and vibrant leadership positions for all projects and project leaders.

Whenever you have questions about TPIC’s policies or any other issues related to management of your pro bono project, don’t hesitate to Joanna Visser, who will serve as your guide in navigating the challenges and rewards of leading pro bono initiatives. Joanna and the entire TPIC staff are always happy to work with students to answer your questions. Email Joanna at jvisser@law.upenn.edu or visit the TPIC office.
II. Policies that Pro Bono Project Leaders Should Establish

A. **Develop a timeline for the project.** Your group should create a timeline for the group’s activities throughout the year. Some of the important activities to schedule are:
   1. First board meeting of the year and monthly meetings thereafter;
   2. Recruiting volunteers;
   3. Training volunteers through an orientation process and periodic trainings throughout the year;
   4. Beginning regular operations;
   5. Stopping at the end of the first semester;
   6. Beginning in the second semester, and recruiting and training additional volunteers;
   7. *Selecting a new board (including: editing board application, creating an application timeline and selection criteria if not already established, posting the application, and holding interviews);*
   8. Transitioning to the new board; and
   9. Closing the project for the summer

B. ***Decide how to choose the next board.** Every pro bono project should have a clear application process. The current board should prepare application materials. The board should also decide in advance how it will select among applicants. Does each board member pick his or her replacement? Does the board try to reach consensus on all applicants? If the board cannot reach consensus, how does the board make a final decision? The organization’s policy for selecting the incoming board should be well documented in your project manual and any other materials you plan to share with future boards.

C. **Develop Contracts for Volunteers.** The board should create a contract for its volunteers. The contract should explain what the organization expects of them, and volunteers must sign the contract. Volunteer contracts ensure that volunteers know what their responsibilities are. Contracts can also specify consequences for failing to report for shifts in a court or clinic, or failing to submit work on time. You may also require that volunteers sign contracts in order for their hours to be approved. Many boards have found it helpful to require feedback from volunteers regarding the project, its work, and the work of the supervisors and project leaders. This feedback can be extremely informative for improving projects in future years.