





# BUILDING A FIRM **FOUNDATION**

## **BEST PRACTICES FOR CREATING A MORE GIVING LAW OFFICE**

BY PAULA TSURUTANI

Although relatively new, the private foundation created by law firm McKenna Long & Aldridge, LLP has provided \$2.5 million to community efforts since its initiation less than a decade ago. The foundation launched in 2007, began funding projects in 2008 and supported 94 organizations in 2012 alone, serving as an example of how firms are focusing on their charitable giving and related volunteer endeavors, despite the constant notion of law firm cost cutting. Even in challenging economic times, law firm foundations like the McKenna Long & Aldridge Foundation are directing resources toward philanthropic causes, while providing an infrastructure to focus and magnify a firm's core values and contributions in the community.





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Firms that are interested in launching their own foundation don't have to start completely from scratch. Take a look at what firms like McKenna Long & Aldridge are doing when it comes to initiatives, organization and outreach.

#### **WHAT ARE LAW FIRM FOUNDATIONS DOING?**

The range of the McKenna Long & Aldridge Foundation's giving is varied. Megan McCamey, Executive Director of the McKenna Long & Aldridge Foundation, reports that more than half of their contributions have been awarded to organizations that provide access to justice. A portion of their remaining gifts have been directed to support children facing crises, the homeless, poverty and conservation, and the balance has been awarded to organizations where the firm's attorneys and staff currently serve as volunteers.

In the Twin Cities, the Lindquist & Vennum Winter Closet Foundation, co-chaired by law firm partners Katherine Roek and Michael Warren, is driven by a single focus – providing winter coats to children in need. The foundation, which recently celebrated its 20th anniversary, was the brainchild of one of the firm's founders, who believed no young person should be without a new (not used), warm winter coat. The foundation's focused mission has served as a rallying point for the firm. It also has provided a model that the firm's other offices have adopted in their communities. Firm volunteers work in teams to help shop, sort and deliver coats to more than a dozen different organizations in the area. In 2012, Roek reports that the Winter Closet Foundation was able to provide coats to 1,300 children, including infants through high school-aged youths.

#### **IN LIEU OF CHECKS**

The Holland & Hart Foundation, established 15 years ago, promotes the idea of volunteerism among its entire law firm "family," which it defines as lawyers, staff, alumni, friends and clients. Ashley Wald, President of the Holland & Hart Foundation, emphasized that the foundation is "not a check writing center. It is volunteer-centric." To that end, if an organization receives funding from the foundation, then

it is a given that Holland & Hart has a cadre of volunteers who work there. Recently, the firm hosted a nonprofit fair that showcased organizations not currently associated with the foundation, allowing members of the Holland & Hart community to learn about them and connect with other firm volunteers.

#### **INVOLVE EVERYONE**

Involving the entire law firm is one way to break down barriers, unite the firm and stay in touch with an extended law firm family. Staff engagement is very important during the Lindquist & Vennum Winter Closet Foundation activities, Warren and Roek emphasized. The coat drive creates a big buzz in the office, bringing the firm closer together and significantly boosting overall morale. Warren said, "The level of passion for the effort from firm volunteers has been surprising – and inspiring!"

Wald described another foundation effort funded by a long-time Holland & Hart client. Every year, the Holland & Hart Foundation invites the children, grandchildren, nieces and nephews of the Holland & Hart community to volunteer for a local nonprofit organization, and then write a letter to the Foundation about the experience. For each letter received, the Foundation makes a donation to the nonprofit. Not only does this effort involve a client, it expands the firm's volunteer efforts to new nonprofits. It's also a wonderful way to "involve families, introduce children to the value of public service and volunteering, and celebrate the kids' contributions," Wald said, adding that it's also a way to "get the right mix of causes, and make sure everyone has an opportunity to get involved."

Ralph T. Lepore III, Chair of the Holland & Knight Charitable Foundation, Inc., noted the foundation also gives retirees and alums an opportunity to stay active at the firm and within the community. "We also involve major clients in our programs when the subject matter aligns with their own corporate social responsibility strategy. For example, in 2012 we welcomed partnerships with JetBlue and Staples, both longtime clients of the firm, as part of our 18th Holocaust Remembrance Project."

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### ORGANIZATIONAL CHALLENGES

#### Meeting the goals of a firm with multiple

**branches:** Having a foundation comes with a number of organizational challenges that need to be juggled. Lepore said, “Our biggest challenge is finding ways to responsibly meet the philanthropic goals of our 2,000+ personnel located in 21 offices throughout the world. It is a constant challenge to set priorities among many important causes.” In an effort to balance overall firm strategies and local efforts, Holland & Knight created donor-advised funds that allow firm offices to dedicate their donations specifically to their local communities.

**Staying organized:** Kim Severson, Chair of the Board of Directors of The Dorsey & Whitney Foundation and partner with the firm, pointed out that “it is important to have an efficient and highly organized system for reviewing and making decisions about grant requests.” The Dorsey & Whitney Foundation Board has an administrative assistant who schedules meetings, prepares board books and performs diligence review on grant requests, in addition to fielding requests. For high efficiency, the firm has a strict schedule of regular board meetings devoted to

grant requests, and only in “special circumstances do we consider requests outside of these scheduled meetings,” Severson said.

**Maintaining Transparency:** Transparency about protocols is essential. Severson said, “It is important to maintain a clear and up-to-date set of internal policies and procedures to guide the decisions of the board. It also is important to have well-established funding guidelines, grant request procedures, and grant request forms, and to adequately communicate these requirements to attorneys or others who want to make a grant application.”

**Locating manpower:** The other real challenge, Lepore said, “is providing human resources to support all of the Foundation’s programmatic and administrative needs. This involves a lot of volunteer time on the part of our attorneys and staff.”

### ADVICE TO OTHER FIRMS

Creating and properly managing a foundation so it becomes a well-oiled machine is a time-intensive effort. At minimum, it requires “constant accounting work, a series of





# LOOK TO YOUR ASSOCIATION

Law firm administrators don't need to look that far to see how their colleagues are working with foundations. Similar to the law firms described in this article, the Association of Legal Administrators also has its own foundation. Since it was formed more than 30 years ago, the Foundation of ALA has invested more than a quarter million dollars in grants, programs and sponsorships. Through its Chapter Challenge Grant Program, the Foundation funds projects that support the work of legal administrators and promote the legal management profession. As an example, Dick Nigon, CLM, the Foundation's Treasurer, noted how ALA's Indiana Chapter used funds to underwrite its program, L.I.F.E. Beyond Shortridge: Leaders in Firms Emerging. This innovative program, a partnership between the chapter and Shortridge Magnet High School for Law and Public Policy, "has provided internships to high school youths to expose and prepare them to the wide variety of legal careers in law firms – beyond being a lawyer." Details about this program and the impact it has had on participants can be found in a Foundation Focus article that ran in the July/August 2012 issue of *Legal Management* magazine.

The Foundation also has funded the publication of a number of monographs and guides, such as ALA's Extraordinary book series, a three volume set that includes *The Extraordinary Administrator*, *The Extraordinary Law Firm* and *The Extraordinary Managing*

*Partner*. These publications mix research, case studies, best practices and practical insights about legal management trends and issues.

In addition, the Foundation has provided funding for educational programs, including the Lagos Visiting Scholars Program, which featured a co-branded international legal administration curriculum involving ALA and the Lagos Business School in Nigeria. Each year, the Foundation also funds the David W. Brezina Memorial General Session at ALA's Annual Conference & Exposition.

The ALA Foundation Board of Trustees reviews grant applications and proposals on a quarterly basis. For grant guidelines, visit [www.alanet.org/foundation/FoundationGuidelines.pdf](http://www.alanet.org/foundation/FoundationGuidelines.pdf).

## **Foundation Donations and Gifts**

You can support the work of the Foundation through monetary gifts on the ALA website as well as donations to the ALA Annual Silent Auction, held during the Association's Annual Conference & Exposition. Contributions to the Foundation are tax-deductible, and can be made in honor of an individual or chapter. For further information about supporting the Foundation, please contact Leslie Bowles from the ALA headquarters office at [lbowles@alanet.org](mailto:lbowles@alanet.org).



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annual reports to various jurisdictions, consistent corporate governance oversight from a dedicated board of directors, responsible grant making, and careful donor relations and acknowledgement practices,” Lepore said. Severson noted you also must pay attention “to all of the applicable laws, including state nonprofit law and the federal tax laws applicable to tax-exempt organizations.” Be sure to “get your process in order,” McCamey said. “Having a clear process that will help guide and monitor your program – including deadlines – is one of the biggest challenges. Be clear, internally, about your purpose and objectives.” To keep up with requests, her board of directors reviews proposals every other month.

Coordinating the foundation’s work with the firm’s pro bono efforts also is crucial. Not only does it build and deepen relationships within the community, it’s also efficient. Dorsey & Whitney’s pro bono group and its foundation jointly maintain a list of Dorsey attorneys who serve on the boards of charitable organizations, as well as nonprofits that are interested in recruiting Dorsey attorneys as board members. The two groups keep informed about their respective activities so they can make introductions about potential board members or direct grant applicants who may need pro bono services.

“If your business culture embraces the idea of giving together through the workplace,” Lepore said, “then starting a foundation may make a lot of sense.” If not, it may be more efficient to run your charitable programs as part of a corporate social responsibility department, or another unit. Regardless of the internal infrastructure, both Warren and Roek advise firms to “spread out the work.”

#### **PROVIDING A GLIMPSE INTO FIRM CULTURE**

Beyond providing a big boost to firm morale and employee engagement, foundation efforts present a personal and meaningful way to forge stronger relationships with clients and express law firm core values. Giving back to communities often is benefit enough, Severson said.

But, the ability to share foundation work with clients and potential clients is critical, Lepore said, “so they get a glimpse of who we are as attorneys and people – individuals who take very seriously our oath and our privilege to give back to our communities.”

The community visibility from volunteer efforts naturally may help attract interest – and clients. But, working shoulder-to-shoulder with clients yields bigger benefits. “Partnering with clients is one of the best and most fulfilling ways we have found to strengthen relationships that are essential to the success of our business,” Severson said. Foundation work also is a topic that recruits bring up, Wald said. “Many candidates want to make sure the firm is involved with the community. We also involve our summer associates with volunteer efforts so they get a complete picture of the firm’s culture.”

Sometimes a foundation’s work can create exciting synergies. McCamey cited one such project that began with the foundation’s work with a nonprofit that helps victims of trafficking. Over time, this project became a multifaceted firm effort – bringing together the foundation efforts, its pro bono activities, attorney and staff volunteers, support from a firm-wide women’s initiative, and involvement with an external, national women’s organization. It was a great success story that yielded visibility, wide-ranging firm involvement and great community results. “A law firm foundation can help express the dimension that brought so many to the practice of law,” McCamey said. “It aligns a firm’s mission with its vision and people.” ■

#### **About the author**



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