BerkeleyLaw
UNIVERSITY OF CALIFORNIA

Student-Initiated Legal Services Projects (SLPS)

STUDENT LEADER HANDBOOK

2017-2018

Pro Bono Program Contact Information

Diana DiGennaro
Director, Pro Bono Program
Boalt 473
probono@law.berkeley.edu
510.664.4614

Emily Best
Pro Bono Program Administrator
Boalt 471
ebest@law.berkeley.edu
510.642.6818

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I.

INTRODUCTION

Dear SLPS Leaders,

Thank you for your service to the law school and the community, and for your commitment to this important work. This handbook is a reference guide. We welcome your feedback and are always available to help.

Very best regards,

The Berkeley Law Pro Bono Program Team

Diana DiGennaro
Director, Pro Bono Program and Associate Director, Competitions Program
probono@law.berkeley.edu
510.664.4614

Professor David Oppenheimer
Clinical Professor of Law and Faculty Co-Director, Pro Bono Program
doppenheimer@law.berkeley.edu
510.643.3225

Sue Schechter
Field Placement Program Director and Faculty Co-Director, Pro Bono Program
sschechter@law.berkeley.edu
510.643.7387

Emily Best
Pro Bono Program Administrator
ebest@law.berkeley.edu
510.642.6818

Kathi Pugh
Pro Bono Program Volunteer Advisor
kathipugh@law.berkeley.edu

II.

THE BASICS

What are your responsibilities as a SLPS leader?

- ☐ Attend three mandatory meetings:
  - SLPS Leader Training in April
  - SLPS Fall Leadership Lunch in August (Thursday of the first week of classes)
  - SLPS Spring Leadership Lunch in January (Thursday of the first week of classes)
- ☐ Meet with your supervising attorney to plan your trainings and projects for the year.
- ☐ Draft a description of and determine the time commitment for your project.
- ☐ Submit the description and time commitment to the Pro Bono Program Director.
- ☐ Draft application questions for your project and submit them to the Pro Bono Program Director.
- ☐ Schedule trainings for the fall and, if applicable, the spring.
- ☐ Recruit and select new members in the fall and, if applicable, in the spring.
- ☐ Submit your fall membership roster and any subsequent updates to the Pro Bono Program Director.
- ☐ Submit SLPS budget and your request for SLPS funding.
- ☐ Apply for BHSA funding and two rounds of GA funding.
- ☐ Submit reimbursement requests to BHSA, GA and the SLPS Fund, as appropriate.
- ☐ Check in frequently with your members and supervising attorneys.

Questions regarding funding and reimbursements?

→ Contact Emily Best, the Pro Bono Program Administrator, at ebest@law.berkeley.edu.

- SLPS funding sources and permissible expenses
- Reimbursement process for SLPS Fund
- Funding for expenses other than food and travel

Other questions?

→ Contact Diana DiGennaro, the Pro Bono Program Director, at probono@law.berkeley.edu.

- Updates to the website and informational materials
- Any concerns, questions, or issues related to your supervising attorneys, your members, logistics, transportation, or the work of your SLP
- Any other concerns, questions, or issues

III.

KEY DEADLINES & ACTIVITIES

April

- Attend SLPS Leader Training
- Meet with your project's outgoing leaders
- Contact roomplanning-law@berkeley.edu for authorization to reserve rooms

May-June

- Meet with your supervising attorney(s)
- Make sure you have access to and start checking regularly the SLPS group email account and any electronic document storage
- Using your SLP's group email address, create a Google Drive for your SLP
- Complete and timely submit the Fall Information Form

July

- Create a budget and prepare for Fall funding applications
- Email your budget to Emily Best along with your request for SLPS funding
- Complete UC Berkeley LEAD Center Certification (update constitution, at least four members take signatory quiz, at least two members to attend signatory orientation)
- Consider applying for Graduate Assembly Grants for special events, projects, travel, etc.
- Work with your supervising attorney(s) to plan trainings, schedule instructors, and reserve space
  - Who will your instructors be?
  - Where will the trainings be held?
  - What topics?
  - Consider including subject-matter specific legal research training with a Berkeley Law librarian
- Coordinate with other SLPS doing similar work
  - Recruitment events
  - Trainings
- Reserve a table for the Activities Fair

August

- Apply for BHSA funding and attend BHSA funding meeting
- Apply for Graduate Assembly GMER Round 1 Funding
- Attend SLPS Fall Leadership Lunch (Thursday of the first week of classes)

- Attend Student Activities Fair
- Optional: Hold an information session, "office hours," happy hour, or other event for your project

September

- Review SLPS applications, extend offers, and finalize membership
- Timely submit membership roster to Pro Bono Program Director in the correct format (*see* Appendix I, *infra*)
- Deadline for Graduate Assembly GMER Round 1 Funding
- Conduct trainings

October

- Check in with your SLPS members and supervising attorney(s)
- Publicize National Pro Bono Week events

November-December

- Meet with your supervising attorney(s) to debrief Fall and plan for Spring
- Check in with your SLPS members
- Decide whether to accept new members in the Spring
- If accepting new members, complete and timely submit the Spring Information Form (update the project description, the estimated time commitment, and the application questions as needed)
- Apply for Graduate Assembly GMER Round 2 Funding

January

- Attend SLPS Spring Leadership Lunch (Thursday of the first week of classes)
- Deadline for Graduate Assembly GMER Round 2 Funding

February-March

- Select and meet with leaders for the next academic year
- Prepare a transition memo

April

- Attend SLPS Reception to celebrate outgoing leaders and SLPS supervisors

May

- Attend Pro Bono & Public Interest Graduation (optional)

IV.

FUNDING AND EXPENSE REIMBURSEMENT

A. TYPES OF FUNDING

1. SLPS Fund

- **How to apply?** Submit your budget and funding request to Emily Best. New SLPS must first be approved and all SLPS leaders must submit the Fall Information Form and any other required paperwork in a timely manner. You may include in your initial budget any anticipated SLPS Special Project Funding requests or you can submit them at a later date.
- **How much?** Each SLP receives a small amount of money, depending on need, from this account, which is funded by a generous donor. Donors can also contribute to the general SLPS fund or to a specific SLP's account.
- **When can I start spending the funds?** Once your budget/funding request has been approved. New SLPS must be approved.
- **Does the money rollover?** Yes. Balances in each SLP's Berkeley Law account automatically rollover each academic year.
- **Who processes reimbursements?** Submit reimbursement requests to Emily Best, the Pro Bono Program Administrator. Reimbursements may be submitted electronically or in person (471 Boalt Hall). The forms are attached hereto as Appendices IV and V.

2. SLPS Special Projects Funding

- **How much?** Variable and depends on the needs of the project.
- **How to apply?** Submit a proposal. See Section IV.C.2, *infra*.
- **Does the money rollover?** No.
- **Who processes reimbursements?** Submit reimbursement requests to Emily Best, the Pro Bono Program Administrator. Reimbursements may be submitted electronically or in person (471 Boalt Hall). The forms are attached hereto as Appendices IV and V.

3. Boalt Hall Student Association (BHSA)

- **How much?** Funds are available to all Berkeley Law student organizations, including SLPS. The amount varies from year to year.
- **How to apply?** At least one leader (preferably your treasurer) must attend the required BHSA Funding Meeting in August.
- **Does the money rollover?** No. This funding does not rollover to the next academic year and should be exhausted before seeking reimbursements from the SLPS Fund, which does rollover.

- **Who processes reimbursements?** Submit the BHSA reimbursement form to Student Services in 280 Simon Hall.

4. UC Berkeley Graduate Assembly GMER (Grad Meetings, Events, and Resources) Funding

- **How much?** Up to $500 per semester is available for UC Berkeley graduate student organizations for meetings, events, and resources.
- **How to apply?** Visit the GA website for information about how to apply. You must apply each semester. The deadline for Round 1 Funding is in September; the deadline for Round 2 Funding is in January.
- **Does the money rollover?** No. This funding does not rollover to the next academic year and should be exhausted before seeking reimbursements from the SLPS Fund, which does rollover.
- **Who processes reimbursements?** Submit reimbursement requests to the Graduate Assembly.

5. UC Berkeley Graduate Assembly Grants

- **How much?** Up to $1,200 per grant and a maximum of one grant per academic semester. This is an excellent and underused source of funding for larger projects in the areas of diversity, community service, student activism, and educational improvement projects.
- **How to apply?** Visit the GA website for information about how to apply. The deadline for Round 1 Funding is in September; the deadline for Round 2 Funding is in January.
- **Does the money rollover?** This funding does not rollover to the next academic year and should be exhausted before seeking reimbursements from the SLPS Fund, which does rollover.
- **Who processes reimbursements?** Submit reimbursement requests to the Graduate Assembly.

6. Berkeley Law Student Services Travel Grants

- These funds unfortunately cannot be used for SLPS-related travel.

B. HOW TO USE THE SLPS FUND

1. GUIDELINES

- All expenses must be paid out of pocket.
- This money should be used only for expenses directly related to the work of your SLP and its public service mission.
- Permissible expenses: reasonable food for meetings, clinics/workshops, and social events; travel costs to attend clinics/workshops, to meet with clients, etc.; interpreters and translators; necessary supplies and mailing costs; events that further your project's work and mission.
- Prohibited expenses: alcohol and t-shirts, coffee mugs, etc.

2. REQUESTS FOR REIMBURSEMENT

- **IMPORTANT: For expenses *other than food or travel* (*e.g.*, interpreters), please check with the SLPS Program Administrator, Emily Best, before making any payment.**
- Submit reimbursement requests electronically to ebest@law.berkeley.edu or in person at 471 Boalt Hall.
- For travel expenses, please use the Travel Reimbursement Form.
- For food, please use the Entertainment Reimbursement Form.
- Reimbursements can take up to four weeks to process and transfer to your account.
- How much money is in your SLP's account? Please contact Emily Best.

C. SLPS SPECIAL PROJECTS FUND

1. WHAT IS IT?

- Funds set aside for special SLPS projects, such as work-related travel.
- Any SLP may submit a proposal for additional funding for special projects.

2. HOW TO APPLY?

- Please submit a comprehensive proposal that includes an explanation of how the project furthers the mission of your SLP and a detailed breakdown of your budget.
- The proposal should include:
  - An overview of your SLP's work;
  - Your SLP's annual budget;
  - A detailed budget for the special project and a description of how you will use the requested funds;
  - Other sources of funding that you have applied for or received;
  - An explanation of the significance of the special project with respect to your SLP and how the project ties into your work;
  - If the project is a trip, a detailed description of the trip (the itinerary, what will the SLPS members be doing, etc.);
  - The name and organization of the licensed attorney who will supervise any legal work done during the trip;
  - The number of expected participants (if unknown, please give an estimate);
  - The date of the special project and when you need a response from us about funding; and
  - Whether and how you will be able to present your work to the Berkeley Law community (*e.g.*, a written report and/or oral presentation).

- Please keep in mind that we can only reimburse previously agreed upon expenses and will not reimburse anyone for expenses exceeding the approved amount.

D. FUNDRAISING

1. RAISING MONEY FOR YOUR SLP'S ACTIVITIES AND OPERATIONS

- You may engage in independent fundraising activities for your SLP.
- **IMPORTANT: *Before* engaging in any fundraising activities, please send the following information to Holly Fincke in the Berkeley Law Alumni & Development Center:**
  - **Your name and contact information;**
  - **The name of your SLP with a short description of your work;**
  - **The name of the firm(s) or individual(s) that you will contact;**
  - **If a firm, the name of your contact at the firm; and**
  - **The amount that you will request.**
- Alumni & Development unfortunately cannot provide any lists of alumni or other leads.
- Keep track of all fundraising activities and solicitations. We recommend using a spreadsheet saved to your SLP's Google Drive.

2. RAISING MONEY FOR A CLIENT

- California ethics rules prohibit lawyers from giving money to a client or paying for a client's personal or business expenses. Under California Rule of Professional Conduct 4-210, members of the Bar "shall not directly or indirectly pay or agree to pay, guarantee, represent, or sanction a representation that the member or member's law firm will pay the personal or business expenses of a prospective or existing client."
- If a client needs financial assistance and you would like to help, please direct the client to an organization designed for that purpose (*e.g.*, a refugee services organization that can help with resettlement costs). You can personally donate to the organization, help raise money for the organization, and solicit donations to the organization. You should not, however, give money directly to a client, pay for the client's expenses, or raise money to give to a client, unless your supervising attorney has specifically approved these activities.

V.

RECRUITING AND APPLICATION PROCESS

A. RECRUITING NEW MEMBERS

1. WHAT DOES THE PRO BONO PROGRAM DO?

- Maintain a website containing descriptions of all current SLPS projects
- Maintain the SLPS Roadmap guide and a handout with descriptions of all current SLPS projects
- The Pro Bono Program Director gives a short presentation at the LLM and Transfer Student Orientations
- First-year JD students receive a flyer about SLPS and information on how to apply
- The Pro Bono Program staffs a table at the Fall Student Activities Fair
- During the second week of classes, the Pro Bono Program holds a general information session explaining the opportunities available and the SLPS application process

B. WHAT CAN YOUR SLP DO?

- Using the Fall Information Form, provide an updated description of your SLP and the estimated time commitment **(required)**
- Table at the Student Activities Fair
- Hold an information session, "office hours," happy hour, or other event
- Post flyers

B. APPLICATIONS

1. WHAT DOES THE PRO BONO PROGRAM DO?

- Administers one universal student application for all SLPS projects
  - The universal application includes both general questions (to which all applicants must respond) and questions specific to each SLP (to which only applicants applying to that SLP must respond)
  - The general application questions are attached hereto as Appendix X
  - Applicants may apply to a maximum of five SLPS
  - Applicants are asked to rank these five SLPS in order of preference.
- Provides application responses to SLPS student leaders in the form of a spreadsheet
- Creates a schedule for the application process, including the deadline to (a) submit the application, (b) respond to applicants, (c) accept or decline offers, (d) submit membership rosters

- This process is repeated for the Spring application cycle

2. WHAT CAN YOUR SLP DO?

- For the universal application, provide questions specific to your SLP (optional)
  - **IMPORTANT: Please note that you cannot ask or encourage students to miss classes**
- Review applications. You will receive *all* of the SLPS applications, but of course need only search for and review the applicants who applied to your SLP by ranking it their first, second, third, fourth, or fifth choice
- Scrupulously adhere to the application schedule, especially the deadline for final membership rosters
- Please be sure to respond to *all* of the applicants who applied to your SLP, not just those to whom you are extending offers

C. TRAINING, CONFIDENTIALITY, AND COMMITMENT

1. WHAT DOES THE PRO BONO PROGRAM DO?

- All SLPS participants are required to attend a mandatory orientation covering key ethics rules and professionalism
- All SLPS participants are required to sign and return a SLPS Confidentiality Agreement (*see* Appendix VI, *infra*)
- All SLPS participants are required to sign and return a SLPS Commitment Form (*see* Appendix VII, *infra*)
- All SLPS supervising attorneys are asked to sign a letter of understanding (*see* Appendix VIII, *infra*)

2. WHAT SHOULD YOUR SLP DO?

- Work with your supervising attorney(s) to plan and conduct substantive and procedural trainings
- If you need an ethics refresher, attend the SLPS Orientation
- Check in frequently with your SLP's members
- Check in frequently with your SLP's supervising attorney(s)

VI.

RECORDKEEPING

Keeping good records is extremely helpful to you and future leaders of your SLP, as well as to the Pro Bono Program.

Participants	☐ Create and regularly update a membership roster for your SLP. ☐ Submit your roster to the Pro Bono Program Director at the close of Fall recruiting. ☐ Notify the Pro Bono Program Director of any changes in membership throughout the year. ☐ Create a master spreadsheet of your SLP's past and present participants. ☐ Include the following columns: first name, last name, graduation year, program (JD or LLM), preferred email address, permanent email address, and the academic year(s) in which the student participated. ☐ Save your spreadsheet on the Google Drive for your SLP's group email address.
Supervising Attorneys	☐ Create a spreadsheet to track past and present supervising attorneys. ☐ Include name, organization, email address, mailing address, and the academic year(s) during which the person served as the supervising attorney. ☐ Save your spreadsheet on the Google Drive for your SLP's group email address.
Budget	☐ Create/update an annual budget for your SLP. ☐ Save the budget on the Google Drive for your SLP's group email address.
Major Events and Deadlines	☐ Keep a list of all of your annual events so that future leaders do not have to reinvent the wheel. ☐ Include the budget for each event and any notes (*e.g.*, ideal date and time, type of food, best room to reserve, etc.). ☐ Note the lead time for planning, room reservations, food orders, set up, etc. ☐ Save your list on the Google Drive for your SLP's group email address.
Accomplishments	☐ Create a spreadsheet documenting the work of your SLP.

& Results	☐ Work with your supervising attorney to track the number of clients served. ☐ Encourage your members to track and report their hours. (They should be doing this anyway for purposes of the Pro Bono Pledge and summer grants.) ☐ You can use this information for funding requests and fundraising. It also will help the Pro Bono Program advocate for more resources for SLPS. ☐ Save your spreadsheet on the Google Drive for your SLP's group email address.
Leadership Transition Information	☐ What are each specific leader's duties? ☐ Any important contacts other than supervising attorneys (alums, etc.)? ☐ Explanation/list of any materials the new leaders will need. ☐ Tips and tricks: the best/most efficient ways to accomplish your work. Record and preserve all of this institutional knowledge! ☐ Record any thoughts regarding challenges, goals, and long-term strategic planning. ☐ Save the document on the Google Drive for your SLP's group email address.
Lessons Learned	☐ If a difficult situation comes up, take three minutes to write down the issue/problem and how you resolved it. ☐ Work toward creating informal guidelines and policies, and build institutional memory. ☐ Save the document on the Google Drive for your SLP's group email address.

VII.

RECOGNITION AND PRO BONO HONORS

The Pro Bono Pledge is Berkeley Law's voluntary pro bono recognition program. The "pledge" is a personal commitment students make to contribute a certain number of pro bono hours during their time at Berkeley Law. Students who complete the pledge and meet the hour requirement are recognized at the annual Public Interest and Pro Bono Graduation and in the Berkeley Law graduation program. The Pro Bono Pledge is administered by the Pro Bono Program Director, who also administers the Eleanor Swift Award for Public Service, the Kathi Pugh Award for Exceptional Mentorship, and the Pro Bono Champion Award (effective JD Class of 2019).

A. PRO BONO PLEDGE FOR THE JD CLASS OF 2018 ONLY

1. **WHAT IS THE HOUR REQUIREMENT?**
   - 50 hours
2. **WHAT WORK COUNTS?**
   - All work as a SLPS participant, excluding travel time.
   - All work as a SLPS leader, including administrative work.
   - Non-SLPS work must qualify as "pro bono" as defined by ABA Model Rule 6.1.
   - The work must be entirely completely uncompensated (no pay, stipend, or academic credit).
3. **WHAT DOES NOT COUNT?**
   - Any work for academic credit (*e.g.*, clinics, practicums, field placements, , and judicial externships). If, however, you worked hours in excess of those required for academic credit, the excess hours *do* count.
   - Any work for which you receive a salary or stipend of any kind, including summer public interest stipends ("Edley Grants") provided by Berkeley Law. (The pro bono hours you work to become eligible for an Edley Grant *do* count; the summer work for which you receive the stipend does *not* count.)
   - Pro bono work done while working at a law firm as a summer associate or clerk.
   - Travel time does not count.
4. **HOW DO I REPORT MY HOURS?**
   - If you previously used the Pro Bono Dashboard to record your pro bono hours, please continue to do so.
   - If you have never used the Pro Bono Dashboard, please use this form to record your hours.
   - **IMPORTANT: Be sure to record *all* of your hours by April 1 of the year you graduate.**

Please note: the requirements for the Pro Bono Pledge are different from those governing pro bono work for the purpose of Berkeley Law Public Interest/Public Sector Summer Fellowship eligibility ("Edley Grants") and the New York State Bar Pro Bono Requirement.

B. PRO BONO PLEDGE FOR THE LL.M. CLASS OF 2018, JD CLASS OF 2019, AND FUTURE YEARS

1. **WHAT IS THE HOUR REQUIREMENT?**
    - JD Students
        - Pro Bono Honors: 75 hours
        - Pro Bono Honors with Highest Distinction: 200 hours
    - Transfer Students
        - Pro Bono Honors: 50 hours
        - Pro Bono Honors with Highest Distinction: 133 hours
    - LL.M. Students
        - Pro Bono Honors: 25 hours
        - Pro Bono Honors with Highest Distinction: 66 hours
2. **WHAT COUNTS?**
    - All work as a SLPS participant, excluding travel time.
    - All work as a SLPS leader, including administrative work.
    - Non-SLPS work must qualify as "pro bono" work, which we define as follows:
        - voluntary;
        - uncompensated;
        - law-related work;
        - performed under the supervision of an attorney;
        - to assist low-income persons or others who do not have access to legal services, or to otherwise advance the public interest, public service, or social justice.
    - "Uncompensated" means that the student will not receive academic credit, money, or any other type of compensation. Hours in excess of those required for academic credit will qualify, however, so long as the other criteria are met.
    - "Law-related work" is broadly construed.
    - "Supervision of an attorney" is defined as followed: A licensed attorney must ensure that students receive appropriate training, guidance, and evaluation, as well as review all student work product before it is provided to clients or presented to the community, whether orally or in writing. While constant, physical presence may not be necessary, the supervisor should be readily accessible to answer questions that may arise in the course of the students' work. Finally, the supervisor must ensure compliance with all applicable ethics rules and laws.

- Up to ten hours of training time (total over the course of the students' time at Berkeley Law) will qualify; training in excess of ten hours does not qualify.
- The work must be performed during the academic year (first day of the Fall Term through the last day of the Spring Term, including winter and Spring breaks).
- During students' first year, a maximum of 50 hours will qualify for purposes of the Pro Bono Pledge. Hours in excess of 50 hours performed during the students' first year do not qualify.

3. WHAT DOES NOT COUNT?

- Any work for academic credit (e.g., clinics, practicums, field placements, and judicial externships). If, however, you worked hours in excess of those required for academic credit, the excess hours do count.
- Any work for which you receive a salary or stipend of any kind, including summer public interest stipends ("Edley Grants") provided by Berkeley Law. (The pro bono hours you work to become eligible for an Edley Grant *do* count; the summer work for which you receive the stipend does *not* count.)
- Pro bono work done while working at a law firm as a summer associate or clerk.
- Other examples: work for non-SLPS student organizations and journals, fundraising, partisan political activities, and community service that is not related to the law.
- Work performed prior to matriculation at Berkeley Law does not qualify. We have adjusted the hour requirement for Transfer and LL.M. students accordingly.
- Summer work, even if unpaid or for a Berkeley Law Student-Initiated Legal Services Project, does not qualify.
- Travel time does not qualify.

4. HOW DO I REPORT MY HOURS?

- Please use this form to record your hours.
- **IMPORTANT: Be sure to record *all* of your hours by April 1 of the year you graduate.**
- Please do not use the Pro Bono Dashboard to log your hours.

C. AWARDS

1. ELEANOR SWIFT AWARD FOR PUBLIC SERVICE

- Students may nominate themselves or others for the Eleanor Swift Award for Public Service.
- The award is given annually to an exceptional member of the Berkeley Law community (students, staff or faculty) who—like Professor Eleanor Swift—has performed outstanding work to strengthen Berkeley Law's commitment to public service.

- Eligible candidates will have increased the law school's commitment to public service through any or several of the following activities that enable Berkeley Law students to engage in public service legal work during law school or in their careers either as public interest and social justice lawyers or on a pro bono basis: exceptional leadership, administration and support, innovation, outreach, teaching, professional or public writing, mentoring, advocacy, advising, and/or participation in Berkeley Law's public service programs and activities.
- Nomination Process: Anyone in the Berkeley Law community may nominate anyone else in the community. Nominations shall be made in the form of a memo of up to two pages on why the nominee should receive the award.
- Nominations are accepted beginning February 1.

2. KATHI PUGH AWARD FOR EXCEPTIONAL MENTORSHIP

- The purpose of the award is to recognize the outstanding efforts of SLPS mentors or supervisors who—like Kathi Pugh—encourage, mentor, supervise, and otherwise demonstrate exceptional commitment to law students engaged in pro bono work.
- This award is a way to honor and thank the attorney supervisors who support the SLPS program and make possible much of the important work you all do. Please take a few minutes to circulate this announcement to your members and to nominate a mentor/supervisor.
- Nomination process: The nomination should be no longer than one page. The nomination should include:
  - The name of the nominated mentor or supervisor and the law firm, legal services or other organization the he or she is affiliated with;
  - the name of the nominating SLPS group and the individual submitting the nomination;
  - the length of time the mentor or supervisor has been associated with the SLPS group;
  - a description of the mentor or supervisor's contribution to the nominating SLPS group; and
  - contact information for the student or students who have primarily worked with the mentor or supervisor.

3. PRO BONO CHAMPION AWARD (BEGINNING WITH THE CLASS OF 2019)

- Students may nominate themselves or other students for the Pro Bono Champion Award.
- Each year, the award is given to the graduating student who best exemplifies a commitment to and the values of pro bono work.

- Factors that will be considered include but are not limited to hours spent on pro bono work during the academic year, leadership, and support for the Berkeley Law Pro Bono Program and Student-Initiated Legal Services Projects more generally.
- Nomination Process: Anyone in the Berkeley Law community may nominate any Berkeley Law student. Nominations shall be made in the form of a memo of up to two pages on why the nominee should receive the award.
- Nominations will be accepted beginning February 1, 2019.

APPENDIX I

APPENDIX II

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