

IDIS customize community investment of Linklaters and its partner Lefosse Advogados

26/1/2009 – Linklaters, one of the world’s largest law firms, tradition in strategic philanthropy has initiated corporate social investment in Brazil. To align with its global network, the Brazilian office that operates in a cooperation agreement with Lefosse Advogados decided to assess their social contribution and initiated a process to adapt Linklaters community investment guidelines to a Brazilian context. The aim was to understand the firm’s global strategy to create, for the national office, an identity of their own.

During the second semester of 2008 IDIS (Institute for the Development of Social Investment) provided technical consultancy to their office in order to develop a community investment plan. As CAF’s partners in the UK, Linklater’s office in London referred IDIS as their local partner. “Having the assistance of CAF’s Latin America representative was extremely important”, says Rafael Roubicek, chief operating officer of Lefosse Advogados.

IDIS’ job was based on understanding Linklater’s attitude towards community investment, understanding how Brazilian leadership sees community investment and, from there, draw an investment plan which would be able to combine international tradition and local vocation. Therefore, the assistance was composed of two stages: Mapping and Strategic Planning.

Broad to narrow

It is Linklater’s policy to pledge 0.5% of its pre-tax profits to the financing of community investment actions. This value is distributed annually amongst the offices of the network in order to support the development of the communities where they operate. There are three funding themes:

- *Achievement*: to support talented people in the achievement of their potential
- *Enterprise*: to stimulate social entrepreneurship
- *Access to Justice*: rights promotion

“We tried to prioritise one of the focus themes as a way to assist the firm in making their contribution more efficient and centred” states Tatiana Akabane van Eyll, project manager of IDIS and responsible for the first stage. Eight interviews with members of different departments of the office were done to establish the focus to be taken. “In that way, it would be possible to create a strategy that would make sense to every staff member”.

At least 60% of the interviewees saw the development of opportunity as a key area for priority investment in Brazil. “We’ve identified an internal calling to support youth *achievement* projects”, says Roubicek. It also became clear that the members of staff were willing to engage in a volunteering program., which could both explore the immediate skills of a law firm (following the path of pro-bono work) or make use of non-professional skills of the employees.

The process also revealed a desire to keep a traditional practice of the firm: the *Quiz Event* where the clients of Lefosse Advogados in cooperation with Linklaters compete at a corporate dinner party. The winning companies can then choose an NGO to receive funding.

After defining the type of activity and the target audience, it was time to establish the region and the social group to be reached. As a way to facilitate the corporate volunteering program, the community investment committee decided that the chosen social projects should be near the office. A thorough research found nine projects spread through Barueri, Santana do Parnaíba and the neighbourhood of São Remo.

As the closest community to the office and going through an intense urbanisation process, neighbourhood of São Remo was selected. Activity in this community, by Universidade de São Paulo (USP), was an attractive bonus to the office.

Getting to know the realities

From October 2008, IDIS and Lefosse Advogados in cooperation with Linklaters started the first process of choosing the initiatives to be supported. The trigger point was a preparatory meeting with the members of the committee. This meeting had the purpose of helping the representatives understand the criteria before the analysing the proposals. "After all, everything is extremely attractive when we are talking about social interventions", says Carla Cabrera, project manager of IDIS who works in the community's social investment initiative. The *Three Is* methodology, developed by the institute, was used to upskill the members of the committee. It evaluates three aspects of each project: idea, institution and individuals.

Empowered by a document which established objective selection criteria and a guideline to project development, a group of IDIS and Lefosse Advogados representatives in cooperation with Linklaters walked through the alleys of the neighbourhood with the task of gathering "project orders". "Visiting several organisations we could start noticing the differences between working for the community and with the community", reminds Roubicek.

"It was key for the members of the community investment committee to take part during this stage", explains Carla. "Thus, in the following years, they can lead the process on their own". From the decision of the amount of money to be invested to the final stage of results dissemination, the funding of initiatives goes through 11 stages:

- Planning: defining the budget and number of projects
- Identification of possible partners
- Field trip and call for projects
- Arrival and analyses of projects
- Negotiation and adjustments in the projects
- Projects approval
- Process of validation and contract
- Discharge of resources
- Monitoring: project implementation

- Evaluation: projects and partnerships
- Results dissemination

Two NGOs were chosen: the Projeto Alavanca (Project Lever) and the Associação Esporte Solidário (Solidary Sport Association). The former is an incubator of education and social transformation centres; while the latter fosters through sports, children who work as car keepers in USP surroundings.

In order to facilitate the replication of the process, IDIS consultancy created a manual. There, all the procedures of selection and monitoring of the private social investment initiatives are addressed and systemized.