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## PRO BONO: Automating Good Works

By Mark O'Brien

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In years past, fourth quarter was guaranteed to be stressful for Miriam Buhl, pro bono counsel at Weil, Gotshal & Manges. Every December, she would try to wrap up her annual reports about the pro bono activities of the firm's 1,200 attorneys, and keep track of the status of hundreds of pro bono matters.

"Our database was serviceable, but cumbersome," recalls Buhl. "We relied heavily on an extremely busy accounting department to provide periodic reports and special requests as well — by office, by attorney, by matter, etc. This was really onerous for everyone involved," she says. It also often resulted in delays as the accounting department needed to handle more pressing matters first.

Buhl joined the firm two years ago, charged with carrying out Weil's mandate to raise its annual pro bono contribution per attorney to 50 hours. As the saying goes, that goal was easier said than done. Among the challenges she faced: How would the firm find appropriate projects? How would Buhl track cases, hours, and generate reports? How would she match the firm's professionals to appropriate assignments?

But now, Buhl can generate all the reports she needs, without assistance —using Pro Bono Manager, a hosted web program developed by Pro Bono Net, a nonprofit organization that promotes innovative uses of technology to increase access to justice. And the software helps her find appropriate projects, and staff them effectively.

Pro Bono Manager can be compared to client relationship management software — on steroids. It not only helps administrators manage and promote pro bono opportunities, it helps them connect the right project to the right lawyer.

It is another example of how firms are starting to turn to technology to help manage their professionals' workloads. (Goodwin Procter won the 2007 LTN Award for "Most Innovative Use of Technology in a Law Firm," for its proprietary iStaff software that helps automate assignments for its professionals.)

Pro Bono Manager was designed with the input from pro bono staff at 10 Am Law 100 firms. Attorneys complete personal profiles where they indicate their interests, practice expertise and availability. Pro bono opportunities that come in either from the firm or from Pro Bono Net's national network of public interest legal groups can be matched automatically with attorneys in accordance with those profiles. Alternately, administrators can use the database to search for attorneys who might be a good match for a particular opportunity.

The software integrates data from time and billing and personnel systems. Administrators can monitor the status of all open matters, zero in on those that require attention, and even integrate practice materials, news and training events from Pro Bono Net's national partners.

These resources, which include model documents, training calendars and library material, make it less intimidating for attorneys to get involved in pro bono work. Another key benefit is the ability to use the system to identify colleagues who've worked on similar matters, to easily seek advice and share ideas.

### FOUNDATION

Pro Bono Manager is built on Microsoft Corp.'s Office SharePoint Server 2007, SQL Server 2005; with integration



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and search tools by XMLaw, a Massachusetts-based vendor that focuses on the legal industry. By building on SharePoint, each law firm can brand and personalize their Pro Bono Manager site to best match the way their attorneys and pro bono coordinators want to use the system.

"XMLaw supplied software and services that helped make Pro Bono Manager fit in with systems that law firms already use," says Rob Saccone, president of XMLaw. (The company offers OneView Search and OneView Connect, to help firms using SharePoint integrate the system with third-party software tools such as practice management programs, he notes.)

Using the product, firm IT staff or pro bono administrators can securely upload information directly into Pro Bono Manager, all routed and monitored using SharePoint workflow. It uses SQL Server Report Services to deliver web-based reports and statistics that coordinators can use to summarize and monitor firm programs.

Price is based on the number of attorneys at a firm, but generally ranges between \$15,000 to \$50,000 annually.

Weil's Buhl says adopting the software presented an opportunity to revamp our system, and make reporting, case tracking and management much more effective. Plus, she notes, the firm was able to consolidate all of its pro bono materials, "such as our policy, our committee list, our retainer letters, etc., into one central repository that is accessible by the entire [firm] for the first time."

Weil took about six months to decide to sign up for the service, which the firm brands as the "Weil Pro Bono Hot Spot," knowing it would be the first firm to go live with the product.

"We saw this as not only a more efficient use of everybody's time and energy but a great opportunity to connect all things pro bono within the firm in a way that would make everybody here really proud of what we do," Buhl says. "Eventually, it will also help attorneys locate other attorneys within the firm who have worked on similar matters. Our expectation is that this will assist in improving our quality of service. It'll keep the re-invention of the wheel risk at a minimum."

Development of Pro Bono Manager was funded in large part by a three-year, \$1 million grant from the Bill & Melinda Gates Foundation, and from a grant from the Booth Ferris Foundation. Microsoft also supported the project with a generous donation of software.

Pro bono hours among the Am Law 100 increased 58% between 2001 and 2006, according to data from ALM's *The American Lawyer* (a sibling publication to *LTN*). Other Am Law 100 firms, including Orrick, Herrington & Sutcliffe; Debevoise & Plimpton; Manatt, Phelps & Phillips; and Ropes & Gray have purchased Pro Bono Manager and are in the early stages of installing the program.

For more information about Pro Bono Manager, contact Adam Licht, director of product management, at [alicht@probono.net](mailto:alicht@probono.net).

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