Product Features

Overview

Pro Bono Manager™ is a cloud-hosted web application that significantly increases a law firm's capacity to manage and promote pro bono work. Customized, web-based tools enable pro bono teams to:

- More efficiently manage the firm's pro bono case load
- Raise the internal profile of the firm's pro bono program
- Increase volunteer participation and the quality of support and oversight
- Automate the creation of reports about the firm's pro bono work

Operating as a secure, seamless extension of a law firm's intranet, the platform integrates data from internal personnel, billing, time keeping, and docketing systems with content from the public interest legal community including volunteer opportunities, training events, and news.

Technology

Pro Bono Manager™ is hosted in the Microsoft Azure Cloud and built on .NET Framework, using SQL Reporting Services. This highly-reliable platform includes round-the-clock access to world-class sharing and reporting capabilities including:

- Interactive, web-based data exploration, visualization, and presentation experience
- Creation, management, and delivery of even the most complex reports with a high-degree of personalization to accommodate a range of audiences across the firm
- Quick access to data-driven insights regarding performance metrics, trends, case progress and more
- Customized data-driven alerts to proactively deliver information triggered by changing data conditions in operational reports

Benefits

- Increased productivity for your pro bono management team through automation of labor-intensive reporting, case monitoring, opportunity matching and other administrative tasks

- Greater support for individual attorneys, to navigate the firm's volunteer program and find their personal pro bono metrics, practice materials, and pro bono opportunities. Improved oversight helps firms avoid risk and cost of mishandled matters

- Increased pro bono participation, which in turn:

  - Enables the firm to support individuals, organizations and communities that would not otherwise have access to legal services
  - Provides meaningful training opportunities, allowing new attorneys to generate revenue earlier and at a higher rate
  - Allows firm to attract and retain the best talent, reducing turnover and associated costs
  - Wins awards, attracts good press, and improves law firm stature

Feature Overview

Pro Bono Manager™ can be customized to include the following:
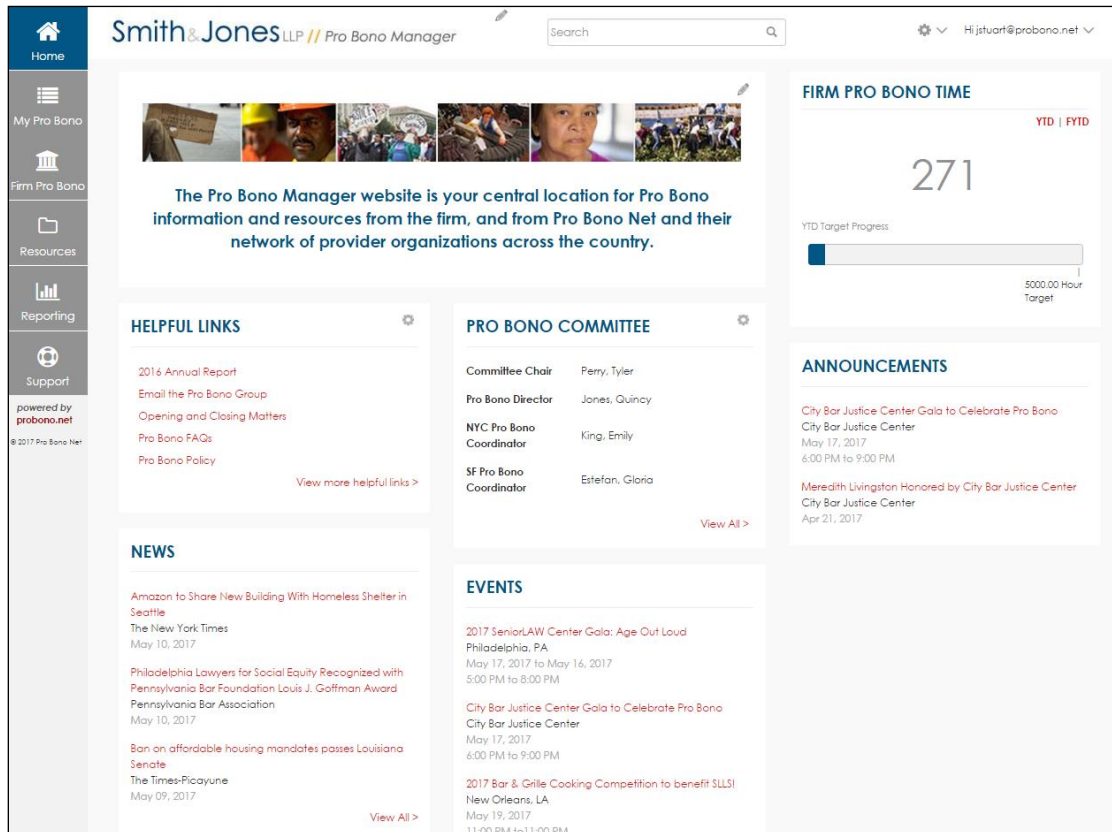
- **Reporting tools** for in-house reports and external surveys including, but not limited to
  - By Referring Organization
  - By Substantive Area
  - By Department
  - By Office Location

- o By Qualifying Standard (e.g. *AMLAW, PBI Law Firm Challenge, Vault*, etc.)

- **Matter Profiles** allow you to tag, search and collect status updates on your firm's pro bono caseload. Staffing, time reporting, case notes and deadline tools ensure matters can be monitored and re-staffed in real time

- **Timekeeper Roster** containing detailed lawyer profiles that show you their pro bono activity and interests and skills

- **Email tools** allow your pro bono department to:
  - o Solicit case updates from lawyers with active cases; reports can be submitted online

- o Provide important information to new Supervising attorneys

- o Manage Newly Opened Matters and Recently Departed Timekeeper information

- **Opportunity Matching** to help line up attorney skills and interests with up-to-date pro bono opportunities from a outside provider agencies or opportunities entered by your pro bono team

- **Library** (including internal and external resources) with up-to-date pleadings, forms, and training materials

- **News and Events lists** showing pro bono events and information that are relevant to each attorney's geographic location

Sample Screenshots

Home Page

Pro Bono Manager™ is designed to function as a seamless extension of your firm's intranet, conforming to branding and identity. It is secure and accessible only by authorized users, with support for integration with firm credential management. The Home Page provides easy access to firm wide policies and contacts, along with personalized information tailored to user identity and office location, including:

- News and Special Announcements
- Pro Bono Calendar Events
- Essential information about your firm's pro bono program and procedures
- A snapshot of current YTD/FYTD time statistics:
  - Firm-wide pro bono hours for your management team
  - Personal pro bono hours for individual timekeepers

Sample Screenshots
Pro Bono Matters

As the heart of Pro Bono Manager™, the Matters section integrates custom views of data from key law firm systems to provide an overview of your firm's pro bono matters. This allows pro bono administrators and individual lawyers to find key information about the firm's pro bono matters. Using the dynamic grid, users can easily sort, filter, and search through the matters to create custom lists and identify key data points.

FIRM MATTERS

Quick Lists: All Open Matters | 1 Filter ▼ | Advanced Search Q

	Name	Number	Client	YTD	Last Date Billed	Total	Open...	Description
☐	Matter 15393	10524.56479	Lawyers' Alliance	31.25	04/27/2019	31.25	04/11/2019	Matter 15393
☐	Corporate Governance	48808.147577	Asian American Federation of New York	28.02	01/29/2019	28.02	01/25/2019	Matter 8562
☐	Naturalization Application	37497.86934	O'Kitundu, Koukla	18.00	02/19/2019	18.00	02/17/2019	Matter 10852001
☐	SIJS Application	47452.155271	Lawyers for Children	15.00	01/13/2019	31.00	12/03/2018	Matter 15853
☐	Entity Formation	41014.107004	CHOICES Education Group	11.75	03/10/2019	11.75	03/07/2019	Matter 1171
☐	Guardianship Petition	49357.150482	Murray, John and Amber	11.50	02/07/2019	11.50	02/05/2019	Matter 8912
☐	Matter 17255	43574.153908	The Children's Storefront School	11.50	06/19/2019	11.50	12/01/2006	Matter 17255
☐	Advanced Directive for Healthcare	44119.125911	Wittman , Charles H. III	9.00	03/14/2019	9.00	03/13/2019	Matter 11532001
☐	Matter 8462	48637.146649	Sergio and Dora Maria Avendano De La Tor	8.50	06/24/2019	8.50	05/17/2019	Matter 8462
☐	Matter 14742191	10429.147880	Lawyers Committee Civil Rights	8.50	07/07/2019	8.50	06/15/2019	Matter Description

1 2 3 4 5 6 7 8 9 10 ... ▶ ▶| 10 ▾ items per page | 1 - 10 of 866 items

STATUS SURVEYS – AWAITING RESPONSE

	Send Date	Recipient	Matter Number	Ma
☐	06/26/2019	Jessica, Stuart3	37900.101376	Nor

STATUS SURVEYS – COMPLETED

	Number	Name	Submitt...	Submitt..
	41300.901419	Troop Leader Contract Revisions	Hegde, Kanchana	06/24/201

Sample Screenshots

Pro Bono Matters > Matter Details

Lawyers can also use the Matters Section to find case precedents, identify experts within the firm to consult on their own cases, and provide status updates on their pro bono matters. The Pro Bono Department can quickly view a variety of matter-specific time statistics, team members, and review status update requests.

LEGAL AID CLINIC (49595.151947)

Matter Name	Legal Aid Clinic		
Matter No.	151947		
Client Name	New York City Family Court		
Client No.	49595		
Matter Description	Matter 9102 add more information		
Alternate Matter Description			
Opened	10/03/2006		
Closed			
Assigned Timekeeper(s)	Vassal, Elaine		

TAGS

Client Type	Non-Profit
Department	Litigation
Matter Status	Open Matter
Matter Type	Family and Juvenile
Office	New York
Practice	Community Responsibility
Representation Type	Clinic Work

TIME STATISTICS

YTD | FYTD | TOTAL

118

HISTORY OF PRO BONO HOURS

Year	Q	M	Percent
▶ 2013			80.00(68%)
▶ 2012			24.00(20%)
▶ 2005			14.00(12%)

MATTER TEAM

Search ___ Clear Filters ← Scroll →

☐	Name	No.	Acti...	Timekeeper Type	Office	Role
☐	Jessica, Stuart3	9999991...	Active	Partner	New York	
☐	Vassal, Elaine	10157	Active	Associate	New York	Respor

◀ 1 2 ▶ ▶| 2 ▾ items per page   1 - 2 of 3 items

STATUS SURVEYS – COMPLETED

	Submitted By
	Jessica, Stuart3
	Jessica, Stuart3
	Jessica, Stuart3
	PBM, ADMIN

|◀ ◀ 1 ▶ ▶|

10 ▾ items per page

NOTES

Search ___

	Note	MTR Note Type 1	MTR Note Type 2
	This clinic is held every Thursday from 3-5PM.		

Sample Screenshots

Timekeepers > Timekeeper Details

Pro Bono Manager™ offers an interactive way to create custom lists of timekeepers, and see details about an attorney's current and past pro bono activity. The Pro Bono Department can also track any attorney's pro bono interests, as well as notes about a variety of topics, such as substantive pro bono experience and availability to do pro bono.

CRANE, DENNY (8332)

			TAGS	
	Title	Partner		
	Start Date	10/18/2004	Client Type	Elderly | LGBT | Low Income | Non-Profit
	End Date			
	Address Line1	555 South street	Committee Members Type	Pro Bono Director
	City	Los Angeles		
Crane, Denny	State	CA	Languages	Spanish
Bill	Zip	32401	Matter Type	Civil Rights | Family and Juvenile
dcrane@pbmtest.com	Country	USA		
No. 8332	Law School	JD - USC Law School	Representation Type	Research | Short Term Counsel
Office: Los Angeles	Practice	Real Estate		
Type: Partner	Department	Real Estate		
Status: Active				

TIME STATISTICS ⚙

YTD | **TOTAL**

13

YTD Target Progress

| 20 Hour Target | 50 Hour Target |

MATTERS

Search [_____] **Clear Filters** ← Scroll → ⬆

Matter Name	Matter Number	Client	Last Date Billed
Matter 9992	50827.159623	Public Interest Law Institute	04/19/2019
Matter 16724	49054.152421	Public International Law & Policy Group	02/26/2019
Matter 9532	50040.154538	Shambhala Mountain Center	05/28/2018
Tenant-Landlord Dispute	10020.801424	Lawson, Robert	08/17/2017

HISTORY OF PRO BONO HOURS

Year	Q	M	Perc
▸ 2019			13.25
▸ 2018			10.50
▸ 2017			22.55
▸ 2016			27.00
▸ 2012			15.00
▸ 2011			39.00
▸ 2010			24.50
▸ 2009			

Sample Screenshots
Timekeepers > "My Profile" and "My Matters"

A Timekeeper Profile can be maintained for each pro bono attorney to view their current pro bono matters and time statistics, record their areas of interest, experience, and availability. The Pro Bono Department can use this information to tailor case placement efforts and provide more personalized assistance.

Sample Screenshots
Reporting > Dashboard

Pro Bono Manager™ provides the Pro Bono Department with a set of powerful reporting tools to create both narrative and quantitative reports. Coordinators will be able to track and report on qualifying hours by referring organization, office location, substantive area, department, or position for major external surveys, including *American Lawyer*, *Law Firm Challenge*, Vault, *VOLS*, and others.