

Benchmarking of Existing Online Pro Bono Platforms

(WP 3.1) Report

May 2022

The present document was prepared by PILnet, in the framework of the
CLEAR-Rights project



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1. Introduction and context

1.1. CLEAR-Rights Project

The overall objective of CLEAR-Rights is to “improve equal access to a lawyer for children suspected or accused of crime, through strengthening access to quality and specialized government-funded legal aid and pro bono legal assistance”, in line with Articles 6 and 18 of Directive 2016/800/EU.

The general approach of CLEAR-Rights is to address children’s needs and vulnerabilities when faced with the challenges of the justice system by: (i) building the capacities of legal practitioners for the provision of tailored child-friendly free of charge legal assistance; (ii) Establish a legal assistance network to match the legal needs of non-governmental organizations and children with legal aid and pro bono lawyers willing to provide legal assistance, as well as share promising practices related to providing legal assistance to children in conflict with the law; (iii) developing child-led tools to assess the quality of legal assistance received by children; and (iv) raising awareness on the equal rights to legal assistance for children in criminal proceedings, and sharing experiences among lawyers to enhance the quality of legal assistance to children in conflict with the law.

1.2. Work Package 3: Background and needs assessment:

The rationale behind the need to create a European Child Justice Clearinghouse derives from the need to address the following challenges:

- Lack of access to specialized and quality legal assistance for children
- Lack of efficient cooperation mechanisms between the civil society sector and the pro bono sector to provide quality legal assistance to children and to support collaborations among CSOs and legal professionals
- Insufficient capacities of legal aid and pro bono lawyers to provide legal assistance to children

- Difficulties to connect local needs of children in conflict with the law with legal aid and pro bono lawyers
- Lack of cooperation between European lawyers in order to relay the protection of a minor in crossing borders scenarios
- Lack of knowledge of the judicial and legal systems of European countries
- Lack of cooperation between EU NGOs specialized in minors
- Lack of follow-up of minors who move from one European country to another
- Inadequate regulations for child protection and the need to advocate for improved regulations
- Necessity for harmonization of European rules

Under this work package, in particular, the project plans to:

- a. Set up a national online clearinghouse for child justice in Romania and reinforce the clearinghouse in France
- b. Set up a European online clearinghouse for child justice
- c. Organize a regional child rights clearinghouses workshop in Hungary to discuss the methodology of setting up clearinghouses, challenges, and opportunities for European lawyers
- d. As a preliminary baseline for the above mentioned activities, produce a benchmarking of existing online pro bono platforms on child justice to identify existing resources and opportunities to exchange for lawyers providing free of charge legal assistance to children.

1.3. Purpose of this report

A clearinghouse is both a *mechanism* through which lawyers can support and advise front-line NGOs, social enterprises, and sometimes individuals on a variety of legal matters on a pro bono basis, and an *institution* cultivating and convening lawyers to support and advise NGOs.

Under the CLEAR-Rights project, partner organizations will set up a specialized clearinghouse that will be available to assist with the legal needs of children's rights organizations and social enterprises, set the base to potentially support individual clients, and further cultivate lawyers to volunteer their time and expertise for the support and advise of front-line NGOs. There are various online platforms that support the functions of the clearinghouse.

The purpose of this report is to identify and benchmark the existing online pro bono platforms in the area of child justice, to *identify existing resources and opportunities to exchange for lawyers providing free of charge legal assistance to children*, and through this create a baseline to support the development of European Child Justice Clearinghouse (EU-CJCH). It is also suitable for those new to brokerage, especially from the technology perspective, to understand the work of a clearinghouse from the perspective of process optimization and technical support.

2. System of Clearinghouses Pro Bono Brokering in Europe

2.1. Clearinghouses in Europe

In many jurisdictions, free legal services have traditionally been available to those in need either informally, from solo practitioners and small firms on a pro bono basis, or through legal aid or non-profit organizations that employed lawyers to provide free services to specific categories of clients in need. During the last three decades, pro bono has become a more institutionalized service within the legal profession. A number of factors have contributed to this. First, in some jurisdictions, cuts in government-funded legal aid programs challenged the legal profession to examine the availability of free legal services to those in need and to consider the profession's role in providing such services on a pro bono basis. Second, as the size and globalization of law firms began to grow, many law firms started to institutionalize their firms' pro bono work, in part in order to recruit top law school graduates and retain associates. Finally, many bar associations began organizing non-profit pro bono programs and promoted volunteerism at law firms as an alternative to legal aid organizations. A critical contribution to the development of pro bono legal

services has been the growth of pro bono clearinghouses—non-profit organizations that help promote the availability and institutionalization of pro bono while acting as pro bono matchmakers, connecting those in need of free legal services with lawyers capable of providing it.²

Pro bono clearinghouses broker free legal advice for individuals or organizations from practicing legal professionals. They act as intermediaries between people or public benefit organizations needing legal assistance and lawyers prepared and able to assist. By acting as a hub for the skills and expertise of the legal profession, a pro bono clearinghouse provides civil society organizations and/or individuals with an identifiable mechanism through which they can find and access legal support. It provides access to an otherwise inaccessible service. With the increase in demand for pro bono, as well as general developments within society, the way how clearinghouses fulfill their functions also changes.

While there are differences among the pro bono clearinghouses across Europe, the majority of clearinghouses work together as part of the European Pro Bono Alliance (EPBA). EPBA serves as a platform for European clearinghouses to share lessons learned and know-how and is a platform for voicing issues of common interest and for promoting public interest law within and across Europe.

2.2. Technology support for clearinghouses

Initially, the lion's share of supporting the culture of pro bono³ through law firms and pro bono clearinghouses around the world was done on the basis of in-person discussions and meetings at pro bono roundtables or at pro bono events, the most prominent in Europe being PILnet's European Pro Bono Forum (later PILnet Global Forum). The bulk of the matching has been and continues to be done through phone calls and meetings

² PILnet and A4ID, "Pro Bono Clearinghouse Manual," accessed May 8, 2022, http://www.probonomanual.org/doku.php?id=background_to_the_guide.

³ Lamin Khadar, "The Growth of Pro Bono in Europe" (PILnet & DLA Piper, 2016), https://www.pilnet.org/wp-content/uploads/2020/03/Pro_Bono_Final_Report_V2-1.pdf.

arranged by clearinghouses. With the advent of office processing technology and the digitalization of law firms, matching has been increasingly done by email.

A survey of clearinghouses around the world conducted by PILnet and Justice Connect in late 2019 and early 2020 discovered that email remains the main technology used by clearinghouses as 95.65% of clearinghouses use it as their primary technology. A few clearinghouses use email automation (such as mailing service) and a few clearinghouses use some sort of cloud storage, case, or customer management system.

Share of Clearinghouses using these types of technologies



Created with Datawrapper

Source: Survey conducted by PILnet and Justice Connect in 2020⁴

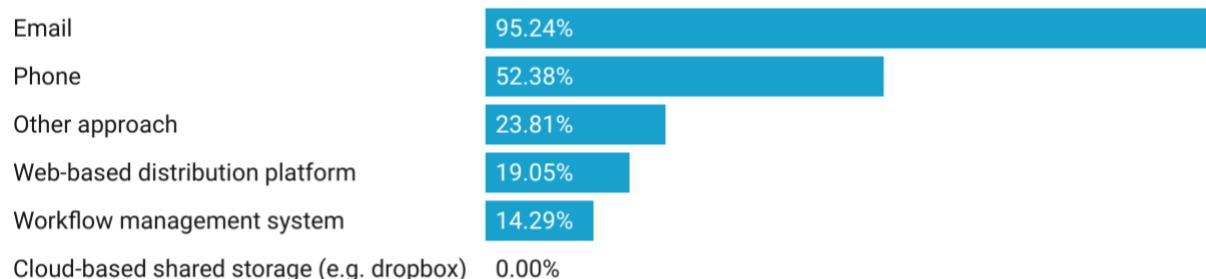
For actual brokering, email and the phone remain the most commonly used technology, as 95.24% of clearinghouses use them. More than half of clearinghouses (52.38%) also

⁴ PILnet and Justice Connect, "Clearinghouse Use of Technology Survey," 2020, <https://datawrapper.dwcdn.net/ditOS/1/>.

use direct phone outreach. The “other” approach category includes in-person meetings and in-person marketplaces, which was listed by 23.81% of clearinghouses.

Brokering Approaches used by Clearinghouses

Share of Clearinghouses that use these types of approaches for brokering



Created with Datawrapper

Source: Survey conducted by PILnet and Justice Connect in 2020⁵

While there is hardly a clearinghouse that does not use *some* technology, the use of online platforms by clearinghouses remains quite scarce. Even though platforms and more advanced technologies offer notable opportunities in terms of scaling the available pro bono support, potentially optimizing the amount of pro bono volunteers' time spent on actual pro bono legal support rather than the overhead process, and gathering more advanced data for evaluation and impact measurement.

2.3. Business processes that could benefit from technology support

As demonstrated in the previous section, clearinghouses' use of technology varies, and it includes other objectives besides the actual pro bono brokerage. Technology is also used for other pro bono functions and furthering of access to justice. This sometimes creates confusion as different terminology is used to refer to different tasks in different clearinghouses, not always directly pertaining to the brokering function per se.

⁵ PILnet and Justice Connect, “Clearinghouse Use of Technology Survey - Brokering,” 2020, https://www.datawrapper.de/_lVlBI/.

The work of a clearinghouse consists of multiple activities involving different stakeholders and the brokering itself, while perhaps the most important, is only one part of the overall process. The brokering, knowledge creation, sharing and management, stakeholder convening, and capacity building are different, but often overlapping activities with multiple feedback loops and synergies, with the overall objective of enabling access to justice for those that would otherwise be excluded.

The brokering itself consists of

1. Demand-side activities (CSOs focus)
2. Supply-side activities (pro bono lawyer focus)
3. Brokerage itself, including operational functions, case/matter management, evaluation, and learning

For a broader assessment of the use of technology for legal empowerment and access to justice see assessments conducted by the Australian Pro Bono Center.⁶

2.3.1 Demand-side activities

The demand-side activities consist of general and specific activities. The general activities include identifying and communicating with potential users of the pro bono support, including via communications campaigns, newsletters, social media, and advertisements. The specific, individualized activities consist of vetting the pro bono client, collecting and compiling the request, scoping and processing it, preparing it for legal volunteers, and following up and oversight of the placed pro bono matter until close-out and evaluation. In an ideal situation, the individual brokered matter helps to establish a more lasting relationship between the pro bono legal volunteer and the pro bono client organization.

2.3.2 Supply-side activities

The supply-side activities also include general and specific elements. The general elements consist of outreach and general recruiting, training, and supporting interested

⁶ Australian Pro Bono Centre, "What Works – Chapter 26: Technology-Based Services: Telephone, Video Conferencing, Online, and Mobile Technology," in *Pro Bono Partnerships and Models – a Practical Guide to What Works*, accessed May 9, 2022, <https://www.probonocentre.org.au/whatworks/part-4/chap-26/>.

legal pro bono volunteers. The specific activities revolve around the actual brokerage, identifying suitable volunteers, vetting the suitability of the pro bono volunteer for the specific client, supporting the clearing of the conflicts-check on the law-firm/lawyer side, and the initial introduction. In the case of brokering in-house lawyer support,⁷ brokering a trilateral partnership between the in-house lawyer, the law firm assuming the liability for the legal support provided, and the pro bono client is also needed.

The general elements of both the demand- and supply-side activities are supported through communication software, including mass-mailing systems. The specific elements consist of matter intake, usually done either over email or through a pre-defined forms/survey collecting feature that is either static (all fields are visible and pre-defined for the user) or interactive (fields change based on individual responses of the user).

2.3.3 Clearinghouse brokerage process

In those few cases that technology actually supports the brokerage, this is done through a form of automating communication of scoped and verified requests for pro bono assistance collected from pro bono clients and sharing them with the network of potential pro bono volunteers. This sharing most frequently happens in the form of a message - most frequently an email - either from the clearinghouse to the entire or subsection of its network of pro bono lawyers, or to an individual law firm (pro bono coordinator) or lawyer. If the pro bono volunteer is available, they can respond over email to signal their interest. If they are responding to the "mass" email, there may be multiple legal volunteers showing interest so the clearinghouse staff needs to individually respond based on its own internal policy or business process, selecting the most relevant or experienced volunteer, and eventually declining everyone else. This can take time and significant human resources, and thus presents a clear case for automation. Pro bono portals offer an option for registered and vetted pro bono volunteers to quickly filter available pro bono opportunities based on their skill-set, jurisdictions, and many other criteria to see more customized and relevant results. If they see a match with their skill-set and availability, they can

⁷ In-house pro bono volunteer lawyers are those lawyers working for a private company that itself is not a law firm, and thus their legal work for a client outside of their employer is usually not covered by their liability insurance.

automatically signal interest to the clearinghouse, conclude the match, or in some cases even offer an option to broker the match between the legal volunteer and a CSO/client.

3. Online platforms and technologies supporting clearinghouses

Clearinghouses are known to use a few different types of technological solutions to support their pro bono brokerage as well as the demand and supply sides of clearinghouse operation. Nonetheless, even here the terminology is not consistent and different organizations mean different things when they refer to their use of technology for or in support of their pro bono brokerage.

The solutions include customizations of off-the-shelf software, which were developed either in the for-profit sector or exists under an open-source license and is maintained by a community of volunteers. These are mainly variations of content management systems (CMS) or client/customer relationship management systems (CRM). Most of the available solutions are combinations of these, with varying degrees of customization.

Technologically such portals consist of (1) intake forms that facilitate collecting and triage of information, (2) a database that facilitates storage and retrieval of information about pro bono matters, and sometimes a separate (3) database of contacts that may include specific client and pro bono volunteer contact information. In a few cases, they may also include (4) a brokerage portal. The brokerage portal itself “sits” on the top of the database and effectively offers convenient means of access to read or also enter data into the database and facilitate the brokerage, from different perspectives of a) client (or more frequently a civil society organization acting on behalf of a client) b) pro bono legal volunteer (or pro bono coordinator at a law firm), and c) managing clearinghouse.

Even those pro bono portals, which are presented as unified single one-stop-shop solutions, offer different levels of integration, as they either offer integration with the organization’s existing databases or integrate different off-the-shelf technical solutions to work as a single system. Nonetheless, even in the case of these solutions, there are likely

differences among the individual installations depending on the needs and existing requirements for integration of individual organizations.

3.1. Intake, onboarding, collection, triage, and verification

The intake of legal requests serves as the collection of information and/or contacts. The technical solutions consist mainly of forms or surveys, and examples include (non-exhaustive) [google forms](#), [Survey Monkey](#), [Formstack](#), [Typeform](#). In the case of integration with CRM or CMS,⁸ there are also solutions that are based on existing plugins into the relevant CRM system or CMS used by the organization's forms that integrate with the particular CMS such as [Caldera Forms](#) under CiviCRM (used by PILnet) or [GravityForms](#) under [Wordpress](#), (used by Justice Connect), or other.

Few organizations have analyzed their technical needs to the extent Justice Connect has in developing their intake tool.⁹

3.2. Database management

Which database management systems are used depends on what is used by the organization already or what the portal is set up to use. Most frequently used are MySQL in conjunction with the CRM/CMS systems, or Microsoft Dynamics CRM. From cloud-hosted, clearinghouses mentioned Amazon Web Services (AWS), or Microsoft Azure.

3.3. Brokering portals

Besides the plethora of customized implementations of various local or home-grown systems, which we will provide examples of, the two most notable portals currently used are Paladin and Justice Connect Gateway/Global Pro Bono Portal. These two main portals represent two different perspectives and the organizations also represent different

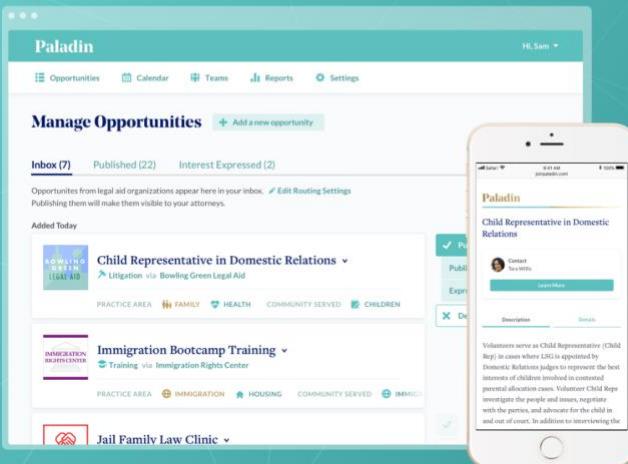
⁸ Many systems use existing technology ecosystems, and run under the content management system (CMS) of the organization's website, such as Drupal, Wordpress, or Joomla.

⁹ Kate Fazio, "Help-Seeker Intake Tool Interim Evaluation" (Justice Connect, May 2019), <https://justiceconnect.org.au/wp-content/uploads/2019/06/Justice-Connect-Intake-Interim-Evaluation.pdf>.

sectors relevant in the pro bono space. While Justice Connect represents a clearinghouse run by a non-profit legal aid organization, Paladin is a technology company providing services to global law firms mainly in the USA.¹⁰

3.3.1. Paladin

Paladin is perhaps the most known software developed by a legal technology company from the perspective of law firm's business needs to manage their pro bono practice.



The screenshot shows the Paladin software interface. At the top, there is a navigation bar with links to Ecosystem, Case Studies, Team, Blog, Login, and Request a Demo. Below the navigation bar, the main heading is "Infrastructure for Pro Bono Champions." A sub-section below it reads: "Whether you're a pro bono counsel, a legal service organization, or a lawyer, Paladin is here to help you do more and better pro bono." There is a "Request a Demo" button. In the center, there is a "Manage Opportunities" section with a sub-section titled "Inbox (7) Published (22) Interest Expired (2)". It lists opportunities such as "Child Representative in Domestic Relations", "Immigration Bootcamp Training", and "Jail Family Law Clinic". To the right, a smartphone displays a detailed view of one of these opportunities. At the bottom, it says "Paladin is the pro bono system of record for the world's leading law firms and companies, including:" followed by logos for Dentons, Wilson Sonsini, Dell Technologies, Verizon, and Holland & Knight. There is also a "Read the Case Studies" button. The bottom section has a dark background with the text "Designed to empower the pro bono ecosystem." and "Empower your team, remove bottlenecks, and measure your pro bono program – in real time."

Source: Paladin¹¹

¹⁰ Jim Dallke, "Mark Cuban-Backed Paladin Raises \$8M - Bizwomen," *San Francisco Business Times*, May 3, 2022, <https://www.bizjournals.com/sanfrancisco/bizwomen/news/latest-news/2022/05/mark-cuban-backed-paladin-raises-8m.html?page=all>.

¹¹ Paladin, "Paladin," Paladin, accessed May 8, 2022, <https://www.joinpaladin.com/>.

3.3.2. Pro Bono Manager

Similarly to Paladin, Pro Bono Manager, a cloud-based service of Pro Bono Net, is run by a non-profit created by two pro bono lawyers in New York City, specifically to cater to the needs of the pro bono lawyers community with the use of technology.

The screenshot shows the Pro Bono Manager website homepage. At the top, there's a navigation bar with links for ABOUT, OUR WORK, GET INVOLVED, BLOG, and DONATE. Below the navigation is a banner featuring two women, one with glasses, looking at a laptop screen. The banner text reads "Pro Bono Manager" and "Optimize your firm's pro bono practice with Pro Bono Manager".

Reporting and Analytics: A green box with text: "Tracking and reporting tools add immediate efficiencies to pro bono operations by making it easy to find the data you need when you need it." To the right is a photo of a person working at a desk with a laptop.

Attorney Engagement and Support: A pink box with text: "Use Pro Bono Manager to stay engaged with and provide support to attorneys via automated messaging, surveys, practice resources, personal pro bono interest profiles, and opportunity matching." To the left is a photo of two people shaking hands at a conference table.

Risk Management: A blue box with text: "Monitor matters and the attorneys who are working on them to ensure issues are identified and addressed in a timely fashion." To the left is a photo of a person's hands typing on a laptop keyboard.

Data Integration: A blue box with text: "Pro Bono Manager 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." To the right is a photo of a person working at a desk with a computer monitor.

Summary: A light gray box at the bottom right contains the text: "Pro Bono Manager™ is a cloud-hosted SaaS application that securely integrates with your firm's pro bono data and conforms to your firm's brand and identity. Features can be configured to meet your unique pro bono management needs."

Source: *Pro Bono Manager*¹²

Pro Bono Manager offers four areas of benefit: 1) risk management, 2) reporting and analytics, 3) attorney engagement and support, and 4) data integration.

The risk management feature allows users to monitor matters and attorneys who are working on them to ensure issues are identified and addressed in a timely fashion. The reporting and analytics section provides tracking and reporting tools to add immediate efficiencies to pro bono operations by making it easy to find the data as needed and when needed. The attorney engagement and support areas allow the Pro Bono Manager to be used to engage with and provide support to attorneys via automated messaging, surveys, practice resources, personal pro bono interest profiles, and opportunity matching. The data Integration within Pro Bono Manager allows for data to be integrated from internal personnel, billing, timekeeping, and docketing systems with content from the public

¹² Pro Bono Net, "Pro Bono Manager," accessed May 8, 2022, <https://www.probono.net/our-work/advocates/pbm/>.

interest legal community including volunteer opportunities, training events, and news.¹³ Pro Bono Net also offers a [Remote Legal Connect](#) platform, which allows legal services providers, pro bono initiatives, courts, and community partners to build and manage a legal support program. The platform enables organizations to enroll, manage, and pair volunteers with clients for virtual consultations, counsel, and document preparation.¹⁴

3.3.3. Justice Connect PB Portal

The Justice Connect's Global Pro Bono Portal builds upon Justice Connect's Gateway portal, used in Australia. Since Justice Connect is a legal aid provider and clearinghouse, this product offers an example of a platform built from the perspective of civil society and a clearinghouse. The Justice Connect offers a solution combining an interactive intake form and referral tool for other legal service providers with a portal for managing pro bono matters and tracking interest from and assigning pro bono legal volunteers.

The screenshot shows the homepage of the Global Pro Bono Portal. At the top left is the Justice Connect logo. To its right is an orange button labeled "REGISTER INTEREST →". Below the logo is the title "Global Pro Bono Portal". Underneath the title is a subtext: "An award winning pro bono platform developed by the charity [Justice Connect](#). Tried and tested in Australia - now going global in partnership with justice champions around the world." The main content area features a large card with the message "Hi Georgia, here's the latest updates for you." Below this are two sections: "Direct Opportunities" and "Expressions of Interest". The "Direct Opportunities" section lists three items with "VIEW" buttons: "Disability Pensioner seeking assistance with AAT review of NOIA decision", "SACAT representation needed for tenant who was evicted for leaving pitch light on", and "Women's refuge requires advice about enforceability of tenancy agreement". The "Expressions of Interest" section lists three items with "VIEW" buttons: "Employee with mental health issues requires merits assessment in sexual harassment claim against...", "Help Victorian tenants understand the law - Participant needed! What happens when I apply to...", and "Low income couple with limited English seeks help identifying address for service for other party".

Source: Justice Connect¹⁵

¹³ Pro Bono Net.

¹⁴ "Remote Legal Connect - Pro Bono Net," accessed May 9, 2022, <https://www.probono.net/programs/rbc/>.

¹⁵ Justice Connect, "Our pro Bono Portal Makes Legal Help Quick and Seamless," *Justice Connect* (blog), accessed May 8, 2022, <https://justiceconnect.org.au/about/digital-innovation/gateway-project/global-pro-bono-portal/>.

3.3.4. Other custom-made systems

Piattaforma Pro Bono Italia

Launched in June 2021, "Piattaforma Pro Bono Italia" is an innovative technological tool custom-made for Pro Bono Italia for the online reception and management of requests for pro bono legal assistance. The bilingual platform facilitates the circulation of pro bono requests received by the existing Italian clearinghouses (at the time of the launch CILD and CSVnet and since January 2022, Pro Bono Italia Clearinghouse and CSVnet) and other international partners, to all registered lawyers, unifying the system in the entire Italian territory. Registered law firms and lawyers can access the platform at any time, learn about the pro bono requests currently available and receive a notification on new requests every time a new matter is uploaded by the clearinghouses. Moreover, the platform sends a summary of all available requests every fifteen days to all registered legal professionals. In order to tailor the users' experience, Piattaforma Pro Bono Italia allows lawyers and law firms to customize the settings to receive notifications according to their preferences and areas of practice. The platform is constantly monitored and new features and improvements are implemented on an ongoing basis, based on the feedback of the users of the platform (including the clearinghouses, the law firms and lawyers, and the NGOs). The platform also allows for data collection and analysis for a better understanding of the trends, needs, and interests in the pro bono environment and better tailoring of the service.

Piattaforma Pro Bono Italia can receive pro bono requests from NGOs and, since February 2020, from private persons in need and allow for assistance for cases related to children's rights. Pro Bono Italia also created a set of Guidelines in order to guide pro bono lawyers assisting individual requests.

NEW REQUESTS | IN CHARGE

Tipologia 

<p>■ ORGANISATION #173 ■ Association and third sector law</p> <p>Request submission Richiesta di consulenza per libro volontari ed assicurazione</p>	<p>■ PRIVATE #162 ■ Family law</p> <p>Request submission Assistenza legale per separazione/divorzio internazionale con addebito a carico di cittadino statunitense per violenza domestica</p>	<p>■ PRIVATE #149 ■ Family law</p> <p>Request submission Legal assistance in ongoing appeal case regarding parental agreements and defence assistance in criminal proceeding ex art. 570-bis of the criminal code.</p>	<p>■ PRIVATE #148 ■ Immigration Law</p> <p>Request submission Legal support from a visa denied immigration lawyer</p> <p>Deadline 30.01.2022</p>
<p>■ AVAILABLE CSVnet</p>	<p>■ AVAILABLE PBICH</p>	<p>■ AVAILABLE PBICH</p>	<p>■ AVAILABLE PBICH</p>
<p>■ PRIVATE #133 ■ Real estate law</p> <p>Request submission Assistenza relativa a sfratto per morosità</p>	<p>■ PRIVATE #74 ■ Civil law</p> <p>Request submission Assistenza relativa a richiesta di risarcimento danni</p>	<p>■ PRIVATE #55 ■ Civil law</p> <p>Request submission Affidamento del figlio minore</p>	<p>■ PRIVATE #32 ■ Civil law</p> <p>Request submission Assistance for social allowance foreclosure</p>

Source: Pro Bono Italia

Spain

Fundación Pro Bono España is working with a private CRM system that was developed with a Spanish IT company to manage pro bono matters. When distributing the bulletin with all the available pro bono cases as a pdf copy by email, they provide a link at the bottom of every case that redirects them to the online tool. Once the Clearinghouse assigns a case to a law firm, they organize a kick-off meeting with all parties.

Ukraine

Legal Foundation's [Legal Lab](#), uses an online resource [ProstoPrav \(JustRight\)](#) in order to administer the process of providing legal aid. The resource provides the possibility of suitable cooperation between clients and lawyers. The resource was created by ULAf.

Florida, USA

Another example, though only a locally-used portal, is [Florida Pro Bono Matters](#), developed and built by a law firm/technology company [SavvySuit](#) for The Florida Bar Foundation. This portal enables the state's civil legal aid and pro bono programs to display on a single, searchable website those cases for which volunteer attorneys are needed. It offers a public listing of pro bono opportunities on an easy-to-use public website.



Florida Pro Bono Matters

In partnership with YOUR local civil legal aid providers, Florida Pro Bono Matters displays pro bono opportunities statewide on one easy-to-use website. Funded by The Florida Bar Foundation, Florida Pro Bono Matters allows lawyers to search and share available pro bono cases with just a few clicks. Click 'Interested' on any case to submit an interest form today. There has never been a better #TimetoTakeaCase!

[SUGGESTIONS OR QUESTIONS](#) [EVERYONE COUNTS 2018](#) [NEED LEGAL HELP?](#)

BELOW ARE THE AVAILABLE MATTERS FOR CLIENTS THAT NEED YOUR HELP:

Search by Location, Legal Aid, or Keyword
Example: family pinellas

PETITION FOR DISSOLUTION OF MARRIAGE WITH DEPENDENT OR MINOR	FAMILY WRONGFULLY EVICTED Client seeks help with eviction that took	Child Needs Help
Description	Description	Description
Client wants full custody of children and is willing to give visitation to their father. They have one car each.	FAMILY WRONGFULLY EVICTED Client seeks help with eviction that took place displacing her and her family. Home was sold while they were tenants, and new owner said she would work with the client and then changed the locks. Their property was left on	This child is in a foster care placement. Her father is incarcerated and her mother's whereabouts are unknown. She is diagnosed with Acute Adjustment Disorder, ADHA, predominantly hyperactive impulsive type. Allegation of child having been sexually a
SHARE	SHARE	SHARE
MORE INFO	MORE INFO	MORE INFO

Source¹⁶

3.3.5. Off-the-shelf technologies used for brokering pro bono

From among the many CRM/CSM combinations that we are aware of, here is a list of the most frequently mentioned or used.

CiviCRM

CiviCRM is an open-source CRM built by a community of contributors and supporters. It is web-based software targeted toward not-for-profit organizations (non-profits and civic sector organizations).

¹⁶ Susan Kostal, "Using Tech to Expand the Pro Bono Provider Pie," *Attorney at Work* (blog), July 19, 2018, <https://www.attorneyatwork.com/using-tech-to-expand-pro-bono-provider-pie/>.

Salesforce for Non-profits

Salesforce is an enterprise-level platform that has a large user base for its commercial edition. It comes with a lot of ‘bells and whistles’ attached. The non-profit version still has the functionality and flexibility, but with more suitable pricing for non-profits. Salesforce, while used by some, has a steep learning curve and is an overkill for most non-profit organizations. In order to achieve customized functionality or portal-functionality, external technical support is required or specialized in-house technical resources, which can lead to soaring costs.

Microsoft Dynamics

CRM system from Microsoft is a line of enterprise resource planning and customer relationship management software applications. We know of one clearinghouse that used this solution because of its relatively speedy customizability for their needs.

Trello

Trello is a flexible work management tool where teams can ideate plans, collaborate on projects, organize workflows, and track progress in a visual, productive, and rewarding way. From brainstorming to planning to execution, Trello manages the big milestones and the day-to-day tasks of working together and getting things done. While mainly a task list, we have heard of small specialized clearinghouses using Trello as a clearinghouse dashboard.

3.3.6. Ad hoc initiatives and technologies used for brokering pro bono

Especially during the humanitarian crisis as a result of the Russian invasion of Ukraine, a number of new brokering solutions were quickly cobbled together, often without the necessary understanding of the nitty-gritty of running a legal brokerage. Some examples that seemed to have been led particularly by technology companies included responses in the Czech Republic and in Hungary.

The Czech example is [UA.SUPPORT](#) which is operated by [AgiLawyer](#) legal technology company. The Hungarian example is known as [Ukraine Legal Aid](#) (link no longer functional).



The only thing necessary for the triumph of evil is for good men and women to do nothing.

Source: <https://ukrainelegalaid.org>

3.4. Related technological solutions

Besides tailored legal support in the form of brokered access to pro bono legal volunteers, there are important technological solutions that facilitate access to information resources, guidelines, and various legal forms. While not directly relevant, and should not be seen as replacing access to legal aid and pro bono support, if understood and used properly, these can greatly increase the helpfulness of legal support provided by individual legal volunteers, as they help clients better understand their legal needs. Examples include [Resources by PILnet](#).

4. Conclusions and recommendations

Technology can potentially play an important role in supporting the brokerage and scaling up of pro bono support for civil society and individuals in vulnerable situations. Nonetheless, its actual potential and usage are context-dependent and need to take into account the specific needs of clients, especially particular needs of vulnerable clients (including children), in both their *actual* privacy and safety, but also their *perceived* privacy and safety. Setting up a European platform thus needs to respond to the sustainability and synergies that exist between the existing work of an organization and the hosting of the specific clearinghouse.

Technological solutions are particularly suitable for situations where there is a high volume of relatively standard and non-sensitive requests. For situations where a more thorough assessment of eligibility of clients is needed, but more importantly the suitability of legal volunteers is to be guaranteed, the technical solutions need to facilitate and assure that this process is reflected in the technology. Technology can also assist in removing the perceived threshold / barrier to accessing pro bono support, particularly for vulnerable victims, including children in conflict with the law.

Out of the reviewed platforms, majority are suitable to be used for brokering children rights pro bono matters. Nonetheless, when choosing the suitable platform, clearinghouses and child rights organizations should remember a few aspects about the brokering of pro bono and should keep in mind a number of criteria that should be fulfilled besides their own technical situation within their organization and team.

There is a wide variety of technical solutions addressing some of the existing bottlenecks in the process, built either by customizing an off-shelf CRM system, investing in tailor-made systems for specific contexts, or adopting a combination thereof. This plurality of technologies is not likely to go away anytime soon. We see a rush to implement technical quick fixes, often without a proper understanding of the implications of their impact on network topography, data governance, and stewardship.

The brokering of pro bono is akin to a ‘matchmaking’ platform service for public interest efforts. Value is created by identifying and matching the right providers of pro bono services (pro bono suppliers) with individuals or the relevant civil society actors representing public interest (pro bono customers with demand), but also through maintaining a healthy pro bono ecosystem that is facilitative of support for those in need of legal help.

If the key features of the pro bono ecosystem are not properly understood and guarded, everyone may end up with less value for more effort. The recommended criteria for choosing which platform to implement or trial should be based on the following three priorities:

1. **Public Interest first:** Systems must be transparent and inclusive pro bono ecosystem governance and prioritization of pro bono matters. Prioritizing the interest of pro bono clients over interest and convenience of pro bono volunteers and law firms. Transparent governance is both a key driver for success and continued value creation, and a guarantee for relationship equality, collaborative innovation, and unrestricted access for civil society in need. Such systems should help nurture pro bono relationships and trust-building, to assure relationship equality.
2. **Avoid vendor lock-ins:** Systems should support effective and interoperable pro bono infrastructure and cooperation. The decision to work with a specific technology provider should not prevent the possibility of a change of the technical solution or provider in the future.
3. **Maintain interoperability and data ownership:** Systems chosen should support internal and external collaboration, and integration with existing or future systems. Portals and systems should support collecting and analyzing data to enable mutual learning, assessing, and understanding pro bono ecosystems, existing best practices and failures in pro bono systems, and patterns and gaps in access to justice.

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