

The Launch: Claud Nelson, Florida Pro Bono Matters, and Legal Aid's March Madness Equivalent



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*This interview is part of a series called *The Launch*, in which different people talk us through the creation and launch of their project.*

A couple of years ago in Florida, a giant idea was hatched to reinvigorate pro bono in the state by creating a centralized and easily accessible catalog of pro bono opportunities. It eventually became Florida Pro Bono Matters, which launched in April 2017.

After a bit of success and seeing the project scale from Miami to the Florida Panhandle, it's spreading to other parts of the country, too. So far, 890 interest forms have been submitted through the platform, and that number is always ticking up.

The project's impressive growth even fueled the creation of the Florida Pro Bono Law School Challenge, which ran from January 7 to May 10 of this year. Borrowing inspiration from college basketball's March Madness tournament, the program matched students from 12 law schools in Florida with lawyers to work on more than 300 client cases.

LSC's Eliot Sasaki recently spoke with Claud Nelson, director of The Florida Bar Foundation's pro bono program, about Florida Pro Bono Matters, the Florida Pro Bono Law School Challenge, and how they both work.

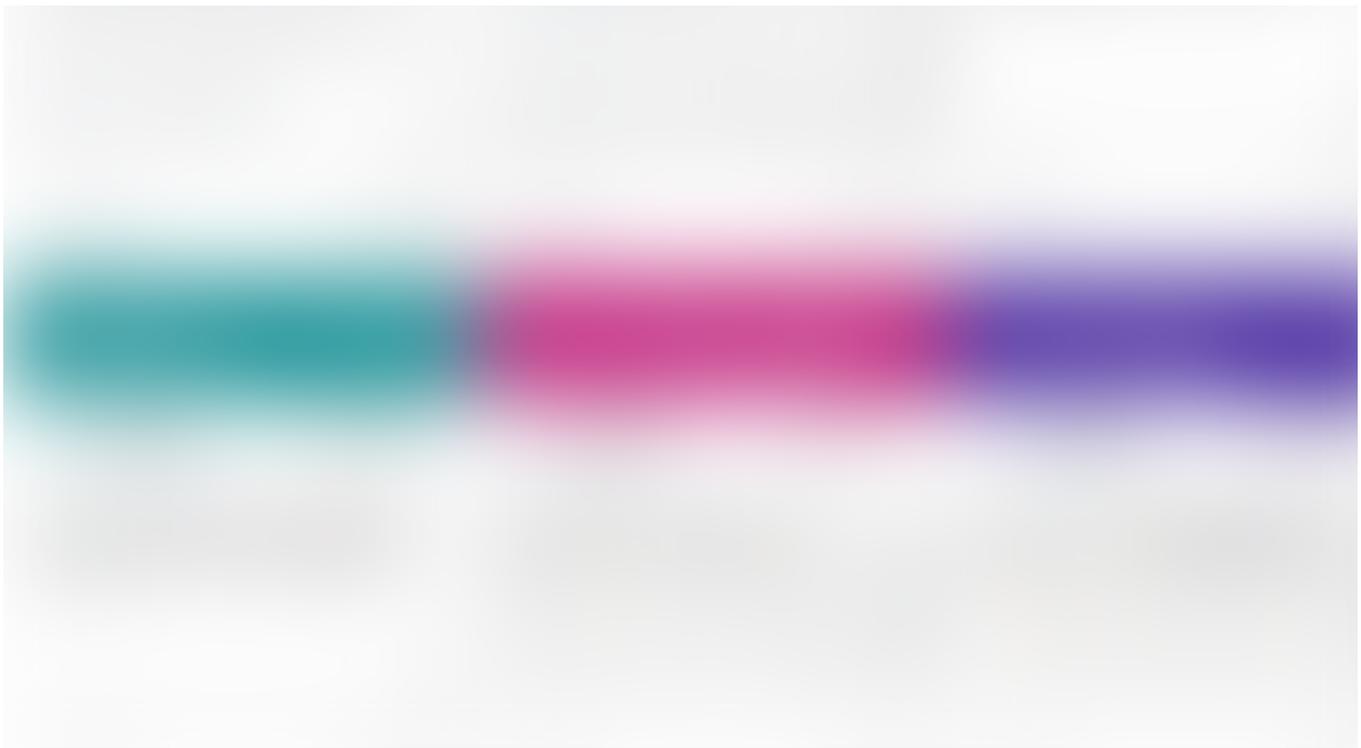


Eliot Sasaki: Can you tell me a little bit about Florida Pro Bono Matters?

Claud Nelson: Florida Pro Bono Matters was created to reduce barriers for pro bono lawyers looking to get involved in pro bono work in Florida.

The way we do that is by allowing lawyers to go to one place to see the myriad opportunities that are available across the whole state of Florida. And we don't have lawyers creating accounts, we don't have lawyers signing up for anything, no passwords to remember. That's all intentional.





Some of the currently available cases to take on Florida Pro Bono Matters.

Florida Pro Bono Matters is an online catalog of available pro bono cases that are live with clients who need lawyers right now. And it displays them across the state. You can use the platform to search by practice area, geographic location, and by legal aid program, if you specifically know one you want to work with.

So that's Florida Pro Bono Matters in a very tiny nutshell.

ES: What was the genesis of the project?

CN: So, I wasn't with The Florida Bar Foundation when the idea for Florida Pro Bono Matters came about, but I have been around for most of it.

My predecessor was approached by the Miami Pro Bono Roundtable in September 2016. The Miami Pro Bono Roundtable is a group of private bar, judiciary, law schools, etc., who get together and talk about the state of pro bono in Miami — Florida's largest county, both in the number of people and lawyers. Florida has about 100,000 lawyers. About 20,000 of those lawyers are in Miami-Dade.

We also have about 15 legal aid programs in Miami-Dade and the surrounding South Florida region that all reach out to lawyers when they have cases that need to be taken. So these legal aid programs have their pro bono panel, a list of lawyers that they send

emails out saying, “Hey, is anyone interested in taking this case?” Well, those lawyers were getting inundated with emails. And they said there has to be a better way.

So they called The Florida Bar Foundation and invited us to one of their meetings. That was in September 2016. And they said, “Is there a better way? We want one platform, one portal, one place to find all of these cases so that we’re not getting inundated with 15 different emails from 15 different organizations every time they’re trying to place a case.” My predecessor said, “Absolutely we can do that,” and then went on a hunt to find someone who could do that for us.

We then found SavvySuit, which is a legal tech firm based in Florida, actually started by two former legal aid lawyers. And they said, “Hey, there’s a better way to do some of this. Let’s create some of those things.” So we partnered with SavvySuit, and a prototype was ready to be presented to the Miami Roundtable about eight weeks later.

The Miami Roundtable said, “This is awesome. Let’s do this.” Between then and April 2017, we worked with members of the Roundtable and other lawyers in the community to design and develop a platform that looked like something that they would want.

Once we came up with something that worked and we liked, we onboarded our providers in South Florida — the legal aid providers who would have to use the website to post cases — and then we launched in April 2017. The launch was a meeting we had with the Miami Pro Bono Roundtable members, other law firms and private lawyers in the community, law schools, and legal aid providers to say, “Look, this is what we have, this is what we’re going to do, and this is how you use it.”

After the Miami pilot proved successful, we decided on a statewide rollout. We divided the state into regions and held a launch meeting in each region. For example, similar to the Miami launch, we held a Central Florida launch in Orlando and invited members of the judiciary, private bars, law schools, and legal aid providers to get all of the stakeholders excited about the project. The regional rollout was essential in the successful statewide launch of the platform, allowing us to tailor our approach based on the needs of the individual region.

Then the final rollout that got us statewide was in September 2017. It took us a year to develop a prototype, launch the pilot, and roll it out statewide.

ES: Looking at the website, it's clear that you thought about user-centered design. How much was and is this a consideration in the building and maintaining of the website?

CN: User-centered design was what we wanted from the start. We had a group of individuals coming to us and asking, "Can we do this, how can we do this, and this is what we want to see."

At each meeting and at each stage of the prototyping process, we ran through "What do you like about this case card? What do you not like about this case card? What information do you want to see? What information do you not want to see?" Out of that came the decision to not create passwords or logins. That took a little bit of, I think, a shift in the thought process of everybody involved because everyone is so used to joining a website by logging on and creating a profile.

That was a barrier that we intentionally didn't want, and that the lawyers didn't want. Then we had to tell the legal aid programs who were posting cases, "Don't post confidential information, this isn't your case file. This is sort of an advertisement. Be as vague as you can and don't use specific case information that would identify the parties in the matter, etc."

For our intuitive search bar — our Google-like search function — instead of having drop-downs or filters, we wanted it to be as intuitive as possible. That was a user design component. The colors of the case cards, the language we used, and how information was displayed was all designed using feedback from the lawyers that were working with us. Even our marketing materials, which you don't see on the site, were designed for users.

We've found that many young lawyers are using the site, which is not surprising. Also, many of the lawyers who are using the site didn't have an existing relationship with a legal aid program. That wasn't intentional. But I think it's a great outcome for what we're doing.

I tell people all the time that in a perfect world, you would never have to come back to this site, right? If you don't have a relationship with a pro bono program and you want to take a case, you find Florida Pro Bono Matters by Googling us. Our site comes up and

you take the case you want — you're connected with the legal aid program that posted the case. Hopefully you have a great relationship with them, and they can just hand you cases to take from that point forward. There's no need to come back to the site to look at cases, but you still would have that option.

Some programs are training their pro bono lawyers to take all of their cases through the site. They're saying, "Instead of us sending out these blast emails, we're just going to put all of our cases on the site. When you're ready to take another case, go to the site and submit an interest form that way."

The Florida Bar Foundation doesn't have the ability to edit (or even take down) individual case cards that are posted. That was also an intentional decision because we needed buy-in from all of the legal aid programs who are participating. They needed to know that we weren't going to be censoring them, that we weren't going to be editing or changing their information.

Something else that's neat and intentional that we didn't have at the very beginning but was developed as we learned through the process, is that every time you go to or refresh the site, it randomizes the cards that appear.

The reason for this is we didn't want the oldest cases being pushed to the back, or the oldest cases being at the very front and the newest cases at the very back. There wasn't a way, and currently isn't a way, to prioritize a case with a very short turnaround. You can write it in the case description, but we didn't want programs taking advantage of a tool like that and having all of their cases populate first. We don't encourage programs to post cases that have a three-day turnaround, for example. That doesn't make sense for a site like this.

The other reason is we didn't want there to be any appearance of preference by the Foundation on whose cases got posted higher in the queue. And so literally every time you hit the refresh button, it randomizes and shuffles all of the cards and populates them in a random order. That prevents lawyers from getting in the habit of going to the last page because they've already seen the first, you know, 32 pages.

So, now there are 36 pages of cases. That's 308 cases right now that are posted on the site. But we had 414 active cases at the end of February. So, many cases have been taken

down since then. (**Editor's note:** These were the current numbers at the time of the interview in March. They change on a daily basis. For example, there were 468 active cases at the end of May.)

On the subject of randomizing cases, Netflix does this too, actually. If you scroll past a certain show or movie on Netflix a certain number of times, there's an algorithm that automatically changes the image. So to you, as the user, it looks like a new movie or TV show, and you linger on it and maybe watch it that time. Well, we're not changing images. We're presenting cases that maybe a lawyer has looked at once but now sees again at a different time. Maybe they've had their coffee that day or just closed a different case, and now they're able to take on a more intense case. It helps those types of cases get picked up much more quickly.

The ABA did a study that talked about the circumstances in which lawyers are most likely to take a pro bono case. The first is if a judge encourages you to do it. The second is if a colleague encourages you to do it. So we developed the share function as well, where if you click "Share" on any of the case cards, it automatically copies the card to your clipboard.

If you're on your phone — the site's completely mobile-friendly — it copies the card to your clipboard and you can paste it into a text message. If you're on your desktop or laptop, you can paste it in an email or any other means. And it sends just that case card. It doesn't send all of the cases or the page you're looking at, it just sends that one case to the person you want to send it to. That's been a really popular tool that we found has helped with cases being taken from the site.

ES: How does the chatbot work?

CN: The chatbot feature is still pretty new. It's one of the latest developments that we have.

What we hoped was that people would just keep going back to the site, right? Lo and behold, that doesn't happen. A user might come to the site and say, "Wow, that's cool. Oh no, there's no cases that are on here in my area, so I won't take one right now." And then they don't come back.

We developed the chatbot to be able to text individuals, which studies show is a more effective means of getting their attention — at least when you're targeting younger lawyers — than if you send them an email (which is more likely to get deleted without being read).

The chatbot does three main things. You can set preferences — like your name, bar number, geographic area, practice area, and the type of case you're interested in — and it saves your preferences. Anytime a new case is added that matches your preferences, you'll get a text with links to those cases at 6 p.m. that day. The text will say, "Hi, this is the Florida Pro Bono Matters chatbot and a case has been added that matches your preferences."

You can also search for available cases through the chatbot. You can ask the chatbot to find you cases and it will ask you what type of case you're looking for. Then it will send you a case. If you read the case's description and you're like, "Uh, not for me," it will send you another one. Or you can just end the conversation. And then if you have a question about the site, how the chatbot works, or how to take a case, it can help troubleshoot those. We've also found that lawyers will text the chatbot if they haven't heard back from the program. When that happens, I get an alert and an email, and then I can reach out to the person and help them with their question.

We also hope to start including training opportunities like recorded CLE's soon on Florida Pro Bono Matters. So, let's say we have a small claims CLE training. We'll be able to put an icon on that case card that says training available for this case. And you can click it to go to the free CLE. But if you're using the chatbot, you can ask the chatbot if there are any trainings available for the case you have, and it will be able to direct you there. We're not quite there yet. But we're close. And the issue in this case isn't with the technology, it's with the library of trainings that we're building right now. So we're working on that.

It's pretty cool. And it's still kind of scary and young. When I'm at an event, I have everyone take out their phones. Then I have them text the chatbot because we want to break it. That's how it learns. It's an AI that our tech team sometimes has to nudge, but the only way it gets better is if people use it.

I still get lawyers asking if we'll have email lists, and we're working on that as well. But the problem with email is that a lot of people don't read them. And the cases change so often that we wanted the tool to be as up-to-date as the site is, and email just doesn't really fit that model well. Cases are added every day, cases are removed every day.

So that's our chatbot in a nutshell and kind of where we're at with Florida Pro Bono Matters.

CN: And if you've got a minute, I'd love to tell you about a latest iteration in Florida Pro Bono Matters, the Florida Pro Bono Law School Challenge.

Florida lawyers know about Florida Pro Bono Matters, and Florida lawyers are using Florida Pro Bono Matters. But my goal for the 2018–19 fiscal year was to engage law students in civil legal aid, which is the third prong of The Florida Bar Foundation's mission. I've had students who have heard about Florida Pro Bono Matters and said, "I want to take a case, how do I take one?" And it's like, well, you can't because you're not a licensed lawyer. And these are real life clients that are looking for lawyers.

We had enough interest that I decided to call up my tech team. We took it to the drawing board and said, "How can we create a branch of Florida Pro Bono Matters that can meet these needs?"

We went through a similar user design process to create the Law School Challenge, which launched on January 7 of this year. It's in its initial pilot stage as well; the pilot ended on May 10.

Florida has 12 ABA-accredited law schools, which is a lot, and 10 of those 12 law schools require pro bono hours to graduate. Law students, of course, are looking for pro bono cases as well. I wanted to create a platform that used the available cases on Florida Pro Bono Matters, but in a way that students could select them, get paired with a lawyer, and then both the student and the lawyer could work on the case under the lawyers' law license, with them being the supervisor on the case.

I also didn't want it to be for 3Ls only, or for just certified legal interns in Florida. I wanted any law student of any experience level to be able to get a mentor and work on a real-life client case if they wanted to. That's the genesis of the challenge.

The reason we're calling it a challenge is because that's the mechanism we're using to get the word out. Students get excited about school pride, and we wanted to give it this March Madness feel. So anytime a student signs up to take a case, their school gets a point. Anytime a lawyer signs up to take a student and a case, their school gets a point. The way it works is if you go to FloridaLawSchoolChallenge.org, it brings you to the landing page. (We also have a banner ad for it on Florida Pro Bono Matters.)

You can choose your role, whether you're a student or lawyer, and you've got the scoreboard. Right now you can see that Barry University School of Law's students are killing it but their alumni need to step up. So what that indicates to me is that 15 of their alumni are taking cases, but there's also 89 cases that students are still waiting to be matched on.

The ones that are a little more comparable would be if you look at St. Thomas, which has 29 students and 23 alumni. So, six students are waiting to be matched with a lawyer. And some schools are like the University of Florida (UF), where more alumni have taken cases than students.



The final scoreboard at the end of the Law School Challenge.

If you click the lawyer button and then any school, it will bring you to a page that shows you the cases that are available for that school. And the lawyer can say, "Oh, there's eight cases here. None of them are in my area, either geographic or practice." But you can toggle at the top of the lawyer page to see cases from all schools. So a UF alum can mentor a student from another school. Then the alum's school gets a point and the student's school gets a point.

All of the cases that the students and mentors choose through the challenge are cases that are already on Florida Pro Bono Matters. But the case cards on the challenge site look different than the cards on Pro Bono Matters, and that's intentional. We're using this as a testing ground to try out new cards that we're going to be rolling out on Florida Pro Bono Matters. We're also collecting feedback through Net Promoter Score surveys that we're sending out to all of the Law School Challenge users to determine if they like the way the case cards look. Do they make sense? Do they provide more information at a glance than the old case cards? And once we refine those, the case cards you see on the Law School Challenge will be rolled out to Florida Pro Bono Matters' main website.

I can tell you that as of two days ago (March 6), we had 377 interest forms submitted by students in just about seven weeks (many students submitted multiple forms). We matched 242 of those students with 242 lawyers on 242 unique real-life client cases. In seven weeks, we placed 242 cases, which for us is a stunning success. (**Editor's note:** These were the current numbers at the time of the interview in March. At the end of the pilot in May, 310 students and 544 lawyers signed up, which ultimately resulted in 306 cases taken.)

We were not expecting this level of success with this program. And it has really reinvigorated Florida Pro Bono Matters. What we're seeing now are lawyers who have heard about the challenge but maybe aren't interested in mentoring a student or maybe have other obligations preventing them from doing so, but instead head over to Florida Pro Bono Matters to take cases there.

I'm thinking about Florida Pro Bono Matters as a kind of hub, a source, and then we'll be launching new projects that pull from it and work off of that base to reach unique groups of users to take cases. The clients will always be the same, the way that legal aid programs post cases will always be the same. But the way that users interact with the site will be different and more focused on explicit interests.

We're shocked and happy about the numbers. I have legal aid programs who are telling me that they're running out of cases. One of them called me and said, "I'm out of pro bono cases — we don't have any more because we placed them all." Which is great because it means they can accept more cases from clients that they might have had to turn away if they had a larger backlog of cases.

What we've learned and taken away from both Florida Pro Bono Matters in the year and a half it has been statewide, and what we've learned from the Law School Challenge in the eight weeks that it has been going, is that some legal aid programs were skeptical. They thought it was extra work.

Getting the lawyers to use the platform was a bit of a hard sell at first. But like anything new, once they learned how to use it and saw how it was useful, and that it's free and not replacing how they're reaching pro bono lawyers, we found that it really caught on quickly. And really, marketing and customer service are key. You have to touch the right people in the right way through the marketing. You also have to support every single user of the site in the way that they need support the most.

I serve as that customer service touchpoint. I make it my personal goal to respond to every email, question, and inquiry, however it gets to me. Sometimes it's a phone call, sometimes it's an email, sometimes it's through a suggestion submission on the website within 24 hours, because I want them to feel appreciated because they are appreciated. The fact that they're taking cases — that's what we want more of.

And then with the Law School Challenge specifically, because The Florida Bar has a broad public records request policy, I was able to request a list of every lawyer in the state of Florida who lives in Florida, is eligible to practice in Florida, and graduated from a Florida law school. So we're not getting Florida lawyers who live in Massachusetts, we're not getting Florida lawyers who aren't eligible to practice, and we're not getting Florida lawyers who went to non-Florida law schools, though they're welcome to participate (that wasn't the focus of this particular marketing strategy).

Every two weeks, we send personalized emails out to all of those lawyers. If a school has more students than alumni participating, which is most of them, the alumni get an email saying there are X number of students who are still looking for mentors and who still want to take a case. Whenever we send those emails out, we see a big jump in participation. So that's been really helpful and successful.

But that's one of the takeaways — being able to reach those people in a really specific way. And we've been really blessed with the success that we've had with both of these, and we wouldn't be able to do the challenge if Pro Bono Matters wasn't such a strong platform to support it.

ES: Yeah, that's amazing. I think it speaks to the quality of your platform, and just to the execution, marketing, and strategy that went into all of this.

CN: I think it's really important to be nimble and to adjust and change as needed. I think a lot of really awesome tech platforms are out there for all different kinds of things. But if people don't know that they exist, or they don't know how to use them, or they don't see the value in them, then they're never going to get used.

A personal motto of mine is change or die, and that applies to many facets of life. But specifically here, I don't want to be that stale website that had really great numbers at the beginning but now is sitting there not being used. It needs to continue to have value. And the only way it can do that is if we're responding to the change in need and the change in desires of the end users of the platform.

I can also share the most recent numbers for Florida Pro Bono Matters. As of March 6, 730 cases have been taken since the pilot's inception. (**Editor's note:** As of today, 890 cases have been taken.) Cases have been taken in 48 of Florida's 67 counties, in 54 different LSC practice areas. Also at that time, there were 291 cases available. And I think I said there are 308 cases today that are available.

And legal aid programs are starting to get it, too. I was talking to one of the users on Monday who said, "You know, I'm really starting to realize that Florida Pro Bono Matters is a numbers game. Once I start posting cases, people really start taking them." That's what I've been telling them and encouraging them to do from day one. If there's 308 cases on the site and you post one, what are the chances that a lawyer is going to find that one case? One in 308.

What we've really found is that the programs that are posting five or more cases per month are getting cases taken regularly from the site. We support our grantee users, the providers who are posting cases; we send out monthly newsletters and hold a couple challenges a year that incentivize them to post more cases or get more cases taken, driving more traffic to the site on that side. And we reward them for using this platform. They don't have to use it. It's not mandatory — it's completely a voluntary, complimentary service that the Foundation provides to all of our grantees and also some non-grantees in the state. We have some providers on the site that we don't actually fund, but still use the platform to post cases.

SavvySuit, the legal tech company that developed Florida Pro Bono Matters with us is rolling it out in several other states as we speak. I know that California's website was turned on a few weeks ago. And that one is public.

There's more coming, and we're excited to have been sort of the genesis of this project. It's really cool — I love that it's being seen in other places in the country, and that other people are starting to use it and really see its success.

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