

Claims

1. A computer-implemented method for coordinating donor-funded pro bono services, comprising:
2. receiving service requests from recipients or referrers via a networked platform, each request including information about a needed service;
3. storing profiles of volunteer professionals including declared pro bono service quotas and schedule availabilities;
4. receiving definitions of impact multiplier rules from donors, each rule specifying an impact metric, a threshold value for said metric, and a pledged funding amount to be released upon satisfaction of the threshold;
5. automatically matching each service request with an appropriate volunteer professional based on the request's characteristics and the professionals' profiles;
6. for a matched service request classified as a simple case that falls within the professional's pro bono quota, automatically scheduling an appointment by integrating into the professional's calendar and confirming the appointment with the recipient;
7. upon completion of a simple case, updating an impact metric record associated with the service (including at least the number of cases completed or hours of service delivered) and evaluating the updated metric against the donors' impact multiplier rules;
8. when the impact metric satisfies a threshold condition defined by a donor's rule, triggering a release of the donor's pledged funding amount and designating it for use in sponsoring service requests classified as complex cases;
9. for a service request classified as a complex case requiring financial sponsorship, allocating released donor funds to that complex case once a corresponding donor rule threshold is met, and assigning a volunteer professional to the complex case with confirmation that the funding is available;
10. automatically scheduling the complex case with the assigned professional upon fund allocation, such that the complex service is arranged with financial sponsorship in place; and
11. sending notifications to relevant stakeholders (including at least the recipient, the professional, and the donor) at key stages of the process, wherein the notifications convey appointment details and status updates.
12. The method of claim 1, further comprising using an artificial intelligence engine to assist in service delivery workflows, wherein the artificial intelligence engine automatically generates a templated document or message draft related to the service request – selected from the group consisting of a consultation summary, a referral letter, a follow-up instruction, or a thank-you note – and presenting said draft to the volunteer professional for approval or minor edits, thereby reducing the professional's administrative burden.
13. The method of claim 1, further comprising providing a social visibility feature in which, upon completion of a service case, the system posts or transmits an acknowledgment message that publicly recognizes the volunteer professional or donor involved, wherein the content of the message highlights the positive impact of their contribution (such as the

number of people helped or the outcome achieved), thereby incentivizing continued participation through public appreciation.

14. The method of claim 1, further comprising receiving a referral input from the volunteer professional after completing a service case, the referral input indicating an additional follow-on need of the same recipient, and in response: creating a new service request linked to the recipient based on the follow-on need, automatically notifying one or more donors or system administrators of the new request, and initiating the matching and funding process for the new request such that continuity of care for the recipient is facilitated.
15. The method of claim 1, wherein sending notifications to stakeholders comprises transmitting multi-channel alerts in a layered messaging sequence, including at least sending an email notification and a text message reminder to the volunteer professional and recipient before a scheduled appointment, and sending a follow-up notification after case completion to prompt for feedback or confirm the outcome, thereby ensuring critical process updates are delivered and acknowledged through multiple communication channels.
16. The method of claim 1, wherein the impact metric used in evaluating donor rules is selected from one or more of: a count of basic service cases completed, a total number of volunteer hours provided, a cumulative monetary value of in-kind services delivered, or a beneficiary outcome metric, and wherein the method further comprises supporting multiple concurrent donor impact rules such that different donors can define different metrics and thresholds which, when each is reached, independently trigger their respective funding releases for complex cases.
17. **A coordination system** for matching pro bono services with donor funding triggers, the system comprising:
 18. a **needs intake module** configured to receive service requests from recipients or referrers and record details of required services;
 19. a **volunteer management module** configured to store and manage professional volunteer profiles, including each professional's skill set, pro bono service quota, and calendar availability;
 20. a **donor management module** configured to accept and store donor-defined impact multiplier rules, each rule including an impact metric type, a threshold value, and a pledged donation amount to unlock for a designated category of service once the threshold is met;
 21. a **matching engine** configured to automatically pair incoming service requests with suitable volunteer professionals by comparing request requirements to the professionals' profiles and availabilities;
 22. a **scheduling module** configured to automatically schedule appointments for matched service requests by interfacing with the professional's electronic calendar when the request is determined to be handleable within the professional's quota, and to generate corresponding notifications of the scheduled appointment to the professional and the recipient;

23. a **funding logic module** configured to monitor service outcomes and update impact metrics in real time, evaluate whether any donor's threshold conditions are satisfied by the accumulated metrics, and upon satisfaction, trigger the release of the associated donor funds;
24. a **case funding module** configured to apply released donor funds to pending complex service requests that require financial support, and to flag or transition those requests into an active state for scheduling once funding is secured;
25. a **notification module** configured to send electronic alerts and updates to recipients, professionals, and donors at predefined milestones in the case lifecycle;
26. wherein the system is operable to coordinate the end-to-end process such that simple service cases are fulfilled through direct volunteer effort and complex service cases are fulfilled with supplemental donor funding, all under a unified platform.
27. The system of claim 7, further comprising an **AI automation module** integrated with the volunteer management module and needs intake module, the AI automation module being configured to analyze service request data and automatically produce draft outputs to assist volunteers – including generating initial case triage assessments, proposing matching suggestions, or drafting standard documents related to the case – thereby streamlining the workflow and reducing manual effort required from volunteer professionals in handling each case.
28. The system of claim 7, wherein the notification module includes a **social engagement component** that, with user permission, publishes or shares public recognition messages highlighting the contributions of volunteer professionals and donors, and wherein the system maintains a profile page for each professional and donor that displays their cumulative impact statistics and earned rewards or badges, thus providing a reward infrastructure and professional showcase visibility to encourage ongoing participation.
29. The system of claim 7, wherein the needs intake module is further configured to accept **follow-on referral submissions** from a professional user upon completion of a service case, and automatically convert each referral submission into a new service request linked to the original recipient; and wherein the donor management module, in conjunction with the funding logic module, is configured to associate available donor funds or prompt donor contributions for said new service request, such that additional needs identified through referrals are systematically captured and supported by the system.
30. A **non-transitory computer-readable medium** storing program instructions that, when executed by one or more processors of a server system, cause the system to perform the steps of the method of claim 1, thereby implementing an automated platform for matching pro bono service cases with volunteer professionals and coordinating conditional donor funding releases based on impact metrics.
31. The non-transitory computer-readable medium of claim 11, wherein the program instructions include instructions for utilizing an artificial intelligence component to generate a templated service output document or communication related to a service case, and instructions for sending a multi-channel notification to a volunteer professional with

the generated document for review, such that the professional can approve or edit the AI-generated content with minimal effort before it is finalized and delivered to the intended recipient or stakeholder.

Expanded Claim Set

1. **A computer-implemented method** for coordinating donor-funded pro-bono or subsidized service cases, the method comprising:
 - 1.1. receiving, via a network, a plurality of service-case records submitted by recipients or authorized referrers, each record including at least a service type and urgency indicator;
 - 1.2. classifying, by an automated triage engine, each service-case record as a *basic case* or a *complex case* according to at least one stored complexity rule;
 - 1.3. storing volunteer-professional profiles that include declared pro-bono quotas and electronically-synced calendar availabilities;
 - 1.4. matching, by a matching engine, each basic case with an available volunteer professional whose profile satisfies service, licensing, and quota requirements;
 - 1.5. automatically scheduling the basic case by creating an electronic calendar entry in the matched professional's calendar and transmitting confirmation notifications to the professional and the recipient;
 - 1.6. updating at least one impact-metric datastore when the basic case is completed;
 - 1.7. evaluating donor-defined funding rules, each rule comprising an impact metric, a threshold value, and a pledged donation amount;
 - 1.8. upon detecting that accumulated impact-metric data satisfies the threshold value of a funding rule, automatically releasing the associated pledged donation amount to a funding pool for complex cases;
 - 1.9. allocating at least part of the released donation amount to a complex case that requires financial sponsorship;
 - 1.10. matching the complex case with a qualified volunteer professional and automatically scheduling the complex case with funding indicated as secured; and
 - 1.11. transmitting multi-channel status notifications, including at least email and in-app messages, to relevant stakeholders at milestones comprising case creation, scheduling, completion, funding release, and referral creation.
2. **The method** of claim 1 wherein each donor-defined funding rule further comprises an *impact multiplier (m)* and evaluating donor-defined funding rules includes:
 - 2.1. computing a product of the threshold value and the impact multiplier; and
 - 2.2. releasing the pledged donation amount only when the accumulated impact-metric data is equal to or exceeds said product.
3. **The method** of claim 2 wherein the impact metric is selected from the group consisting of: (a) a count of completed basic cases, (b) total volunteer hours, (c) cumulative monetary value of in-kind services, and (d) a beneficiary-outcome score.
4. **The method** of claim 1 wherein classifying each service-case record further comprises applying an artificial-intelligence classifier that scores textual and structured attributes of

the record and routes cases above a complexity threshold to donor-funding workflows prior to scheduling.

5. **The method** of claim 4 wherein, when donor funding is not yet available for a complex case, the method includes placing the complex case in a pending queue and periodically re-evaluating donor-funding rules until sufficient funds are released.
6. **The method** of claim 1 further comprising, after scheduling a service case, automatically generating, by an AI document-automation module, at least one templated document selected from: an intake form, a consultation summary, a referral letter, or a progress report, and presenting the generated document to the assigned volunteer professional for approval or modification.
7. **The method** of claim 6 wherein edits made by the volunteer professional are stored to a training datastore to refine future AI-generated documents for similar case types.
8. **The method** of claim 1 further comprising: upon completion of a service case, receiving from the volunteer professional a referral input indicating an additional need; automatically creating a linked follow-on service-case record that inherits contextual data from the completed case; and initiating the steps of classifying, matching, funding, and scheduling for said follow-on service-case record.
9. **The method** of claim 8 wherein donor funds released under the original service case are automatically earmarked for the follow-on service case when the donor's funding rule permits cascading support across linked cases.
10. **The method** of claim 1 wherein transmitting multi-channel status notifications further comprises executing a layered-messaging rule set that escalates from email to SMS to voice call based on stakeholder role and urgency of the milestone.
11. **The method** of claim 1 further comprising maintaining a public profile page for each volunteer professional and donor, updating the profile page with digital badges that are automatically awarded when predefined contribution milestones are achieved.
12. **The method** of claim 11 wherein a leaderboard interface ranks volunteer professionals and donors by normalized impact score over a selectable time period.
13. **A coordination system** comprising:
 - 13.1. at least one processor and memory storing instructions that implement the method of any one of claims 1-12;
 - 13.2. a needs-intake module, a volunteer-management module, a donor-management module, a matching engine, a scheduling module, a funding-logic module, a notification module, an AI automation module, and a referral-management module, each operatively coupled via a service bus;
 - 13.3. wherein the notification module is configured to transmit status updates via at least two different communication channels for each milestone event.
14. **A non-transitory computer-readable medium** storing program instructions that, when executed by one or more processors, cause the processors to perform the steps of the method of any one of claims 1-12.
15. **The method** of claim 1 wherein donor-defined funding rules include tiered logic such that successive thresholds trigger proportionally larger pledged amounts.
16. **The method** of claim 1 wherein the volunteer-management module interfaces with external professional-credential databases to automatically verify licensure prior to case assignment.

17. **The system** of claim 13 wherein the AI automation module further predicts regional service-demand trends and recommends threshold values to donors likely to unlock funding within a target timeframe.
18. **The method** of claim 8 wherein the referral input triggers transmission of a referral-confirmation notification to the donor that funded the original case, including an invitation to fund the follow-on service case.
19. **The method** of claim 1 wherein the communication module automatically redacts personally identifying information from donor-facing messages unless explicit consent is recorded from the recipient.
20. **The system** of claim 13 wherein impact metrics, donor rules, and case-status events are recorded on a tamper-evident distributed ledger to provide auditable transparency of fund allocation.