



Oregon Law Foundation

2017 Annual Report



Our mission

To support access to justice in Oregon by obtaining and distributing funds to **provide legal services** to persons of lesser means, **promote diversity** in the legal profession, and **educate the public** about the law.

A letter from our board president

I am proud to say that access to justice has been a continuing passion for me and is one of the reasons I was delighted to lead the Oregon Law Foundation in 2017. The OLF's primary focus is to support justice for all in Oregon. The OLF main funding source is the interest from lawyer trust accounts (IOLTA) program. The Oregon IOLTA program has been mandatory for all lawyers since 1988 and has allowed the OLF to grant just under \$33 Million through 2017 primarily to organizations that provide legal services to persons of lesser means. These grantees provide core legal services that are critical for strengthening local communities. Provided below are the high points and major initiatives of 2017.

IOLTA revenue and grants

The OLF received approximately \$1.1 million in IOLTA interest revenue in 2017, similar to 2016. The OLF owes its stable IOLTA revenue, despite market interest rates remaining at unprecedented lows since 2008, to its Leadership Banks. These banks pay over market interest on IOLTA accounts, allowing the OLF to make meaningful grants.

The OLF granted \$1,050,000 in annual grants to legal services organizations in 2017. This is less than half of the OLF's granting high of \$2.4 million in 2008. The good news is the OLF is increasing its grants in 2018 by \$150,000 to \$1.2 million. This is because the OLF anticipates an increase in IOLTA revenue due to increasing interest rates and its partnership with Leadership Banks.

Leadership Banks

In 2017, the OLF continued efforts to increase revenue through the Leadership Bank program. Leadership Banks in 2017 paid either 1% on IOLTA accounts (Visionary Banks) or .7% on IOLTA accounts (Advocacy Banks) and waived all fees. In February 2018, for the first time since 2009, the OLF raised its leadership rates to 1.25% and 1%. A full list of current Leadership Banks is at the end of this report.

Partnerships

The OLF works in partnership with the Campaign for Equal Justice and the Oregon State Bar to maximize support for civil legal aid programs. We also continue to serve as fiscal agent for the Oregon State Bar's Opportunities for Law in Oregon (OLIO) program.

Finally, we owe our continued success to our partnership with the lawyers and consumers who know that social responsibility is an important factor in choosing a bank. Choose a Leadership Banks to make a difference because **where you bank matters!**

How we focus our funding

\$1.05M

Annual grants made in 2017.

1982

The first year the Oregon Law Foundation made grants.

\$8,300

Annual grants made in 1982.

\$33M

Funds granted by the Oregon Law Foundation 1982–2017.

To meet our mission, we make grants in three categories. Our policies limit how much annual funding can go to each category.

Category A: full-service legal aid – 55% to 85% of grants

Organizations that were part of the Association of Oregon Legal Services Programs as of January 1, 2000, make up Category A. These organizations are part of Oregon’s efforts to address poverty by creating a statewide system of full-spectrum legal services centered on the needs of the low-income community.

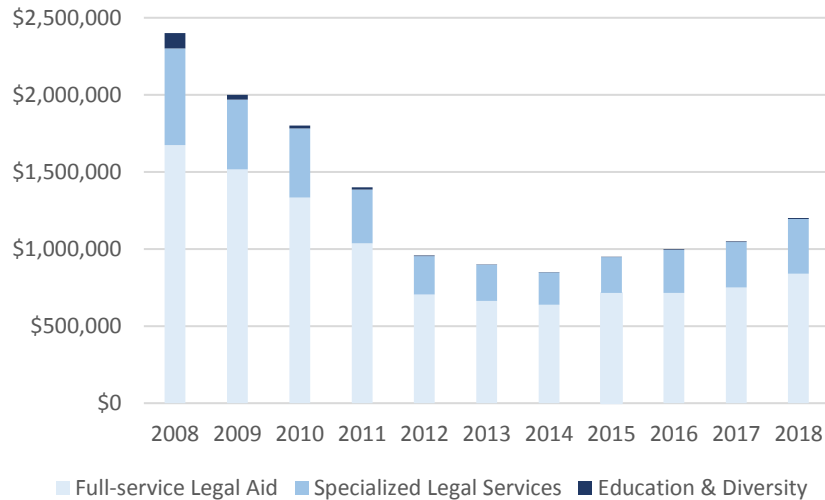
Category B: specialized legal services – 15% to 25% of grants

Other organizations that provide direct civil legal services fit into Category B. These organizations tend to focus on providing services in a particular area of the law or focus on providing services to a particular client community.

Category C: education & diversity – 0% to 10% of grants

Organizations that work in Oregon to educate the public about the law or promote diversity in the legal profession fit into Category C.

Annual grant funding over time



\$100K+

Emergency Grants awarded in 2017.

Emergency grants in 2017

For the first time in its history, the Oregon Law Foundation made emergency Grants in 2017. The OLF policies call for the foundation to make emergency grants to help organizations through immediate unforeseen situations.

The shift in US policy and rhetoric between 2016 and 2017 toward immigration and immigrants resulted in unprecedented fear in immigrant communities. Because of this fear, there was a significant change in demand for immigration information and a need for safety planning. The shift in immigration policy was so unexpected and dramatic that it could not have been anticipated in the 2017 annual grant cycle and the increased demand for services could not be absorbed into organization budgets. At the request of organizations, the foundation made two emergency grants.

Youth, Rights & Justice – \$3,084

Youth, Rights & Justice developed plans for the care of minor children whose parents lack legal status and worked with schools and other organizations to distribute information to assist parents of school-age children.

Immigration Counseling Service & Catholic Charities Legal Services with SOAR Immigration Legal Services – \$100,000

These three organizations provide immigration legal help that generates revenue by charging clients modest fees. When these organizations became flooded with calls for information, in order to meet community need attorneys were shifted from fee-generating work to outreach, legal information distribution, and non-fee generating legal services. In order to allow these organizations to continue to meet community need while maintaining financial viability, the foundation granted \$100,000 in emergency funding to be shared between the organizations to support a coordinated statewide response.

\$4.5M+

Funds granted by the Oregon Law Foundation in 2017 to be paid out over the next five years from Mortgage Settlement funds.

Mortgage Settlement Fund grants

The Oregon Law Foundation is the entity in Oregon designated by the 2014 settlement on mortgage-related litigation between the U.S. Department of Justice and Bank of America to distribute settlement funds for foreclosure prevention legal assistance and community redevelopment legal assistance.

In 2017, the foundation awarded Mortgage Settlement Fund grants totaling over \$4.5 Million to be paid over the next five years. Grant outcomes will be presented in a separate report when available.

How our grantees helped

Legal subject areas addressed

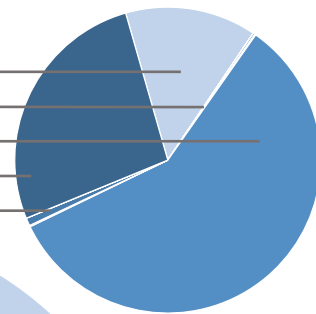
Our grantees who perform legal work keep track of the number of cases they close and the legal subject area into which their cases fall. These charts show the percentage of cases closed in different legal areas for our full-service legal aid grantees and our specialized legal services grantees. The ratio of the area of the two pie charts is equal to the ratio of funding between the two categories in 2017. Numbers reflect the percentage of cases closed in categories by both staff and pro bono volunteers during 2016 or 2017 depending on the most recent year grantee case numbers were available.

21,897

Total number of cases closed by OLF Grantees.

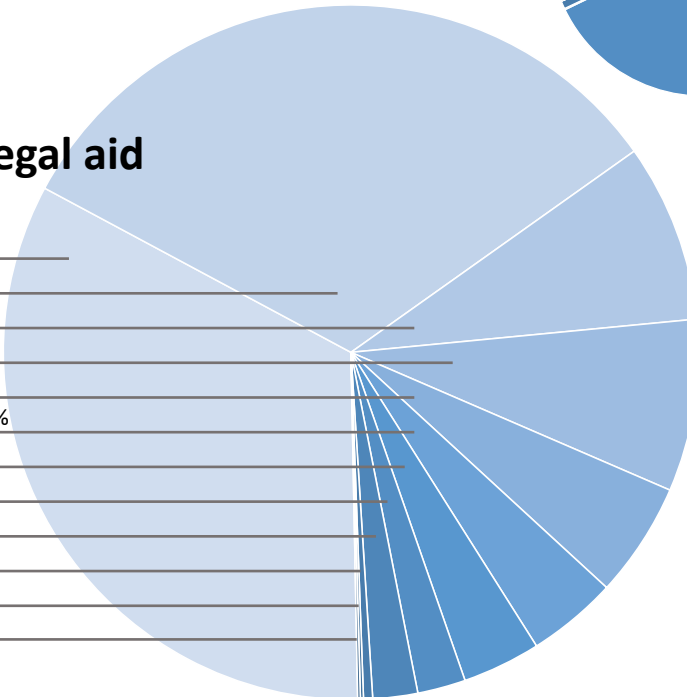
Specialized legal services

Family: 13.9%
Other: 0.4%
Immigration: 58.1%
Disability: 26.8%
Juvenile: 0.8%



Full-service legal aid

Housing: 33.1%
Family: 32.5%
Miscellaneous: 8.3%
Consumer/Finance: 8.0%
Employment: 5.3%
Income Maintenance: 4.2%
Health: 3.6%
Immigration: 2.2%
Other Rights: 2.1%
Juvenile: 0.4%
Education: 0.1%
Disability: 0.1%



Engaging *pro bono* attorneys

Involving private attorneys in the delivery of legal services to low-income Oregonians allows organizations to increase the number of people served in a cost-effective manner. OLF's Category A, full-service legal aid, grantees regularly involve private attorneys in as case workers. In 2017, Pro bono volunteers handled seventeen percent of cases closed by OLF's Category A, full-service legal aid, grantees.



Providing the right level of service

Legal service attorneys help clients in a number of different ways from meeting and providing advice to litigation from trial through appeals. Services are aggregated into two categories: brief service and extended service. Brief service includes the counsel and advice category and the limited action category like writing a letter, making a phone call, or preparing a simple document. Extended service includes negotiating settlements, filing and arguing cases in court or administrative hearings, and other activities like extensive document preparation.

Based on a number of factors including case priorities, client needs and abilities, and the chance that an individual case might affect many or change the system as a whole the right level of service is provided. Time also plays a factor in balancing brief and extended service cases; extended service cases take considerably more time per case than brief service cases. By offering a variety of levels of service, providers are able to help many more clients than they would be able to if only extended, full-representation, cases were accepted.

Sixteen percent of cases closed in 2017 by OLF grantees (counting staff and pro bono cases) were extended service cases.



Our grantees

Total 2017 Grants – \$1,050,000

Association of Oregon Legal Services Programs – \$750,645

The Association of Legal Services Programs is the primary source of civil legal assistance for low-income Oregonians. The Association provides services to all 36 Oregon counties through a network of offices in 17 communities delivering coordinated assistance centered on the needs of the client community.

St. Andrew Clinic – \$110,250

St. Andrew Legal Clinic provides low- and moderate-income people with legal representation in family law cases bridging the gap for families who do not qualify for Legal Aid and cannot afford to hire a private attorney.

Immigration Counseling Service (ICS) – \$99,750

ICS improves the lives of Oregon's immigrant communities, unaccompanied children, and survivors of human trafficking by providing affordable immigration legal services and free informational forums.

Disability Rights Oregon (DRO) – \$35,175

DRO promotes and defends the rights of individuals with disabilities by providing statewide legal services to Oregonians with disabilities who are victims of abuse or neglect or have problems obtaining health care, special education, housing, employment, public benefits, or access to services.

Catholic Charities Immigration Legal Services (CCILS) – \$17,850

CCILS provides low-cost consultations and legal representation to immigrants and refugees and educates the public focusing on family reunification and assistance to the most vulnerable immigrants and refugees, including survivors of domestic violence, sexual assault, and human trafficking.

Northwest Workers' Justice Project / Northwest Employment Education and Defense Fund – \$18,900

NWJP / NEED Fund provides community education and legal representation in employment matters to low wage, immigrant and contingent workers to protect workplace dignity and to improve wages and working conditions.

Multnomah Volunteer Lawyer Project – \$10,500

The Multnomah County Office of Legal Aid Services of Oregon has a specialized Pro Bono Unit with six projects. Annually, approximately 1,800 clients are matched with volunteer lawyers who provide free legal help.

Youth, Rights & Justice – \$1,575

Youth, Rights & Justice improves the lives of vulnerable children and families through legal representation and advocacy in the courts, legislature, schools, and community.

Classroom Law Project – \$3,150

Classroom Law Project promotes public understanding of the law and legal process for 15,000 elementary and secondary students by incorporating the lessons and principles of democracy into the school curriculum

OSB Opportunities for Law in Oregon – \$2,205

OLIO is the OSB's recruitment and retention program for law students who can contribute to the bar's historically or currently underrepresented membership; who have experienced economic, social, or other barriers; who have a demonstrated interest in increasing access to justice; or who have personally experienced discrimination or oppression.

People at our grantees

Part of the Oregon Law Foundation’s mission is supporting diversity in the legal profession. In support of these efforts, our grantees report demographic information about their workers. Here is how the diversity of our grantee’s workers compares to Multnomah County, Oregon, and the nation.

63%

Percentage of grantee lawyers who identify as female; compared to 50.5% of the Oregon population.

83%

Percentage of grantee staff who identify as female.

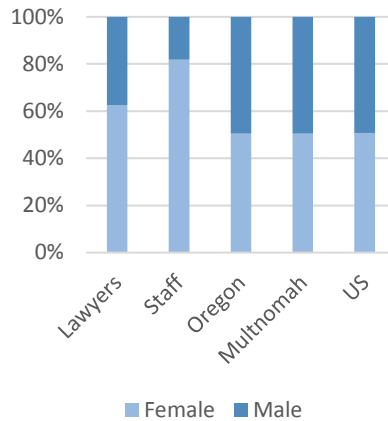
16%

Percentage of grantee lawyers who identify as a racial or ethnic minority; compared to 12.6% of the Oregon population.

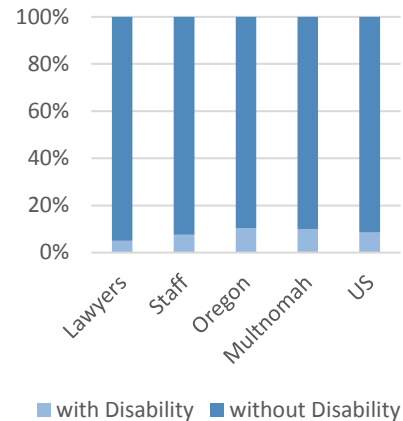
50%

Percentage of grantee staff who identify as a racial or ethnic minority.

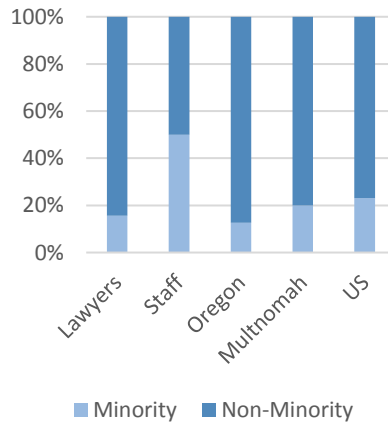
Worker Gender Identity



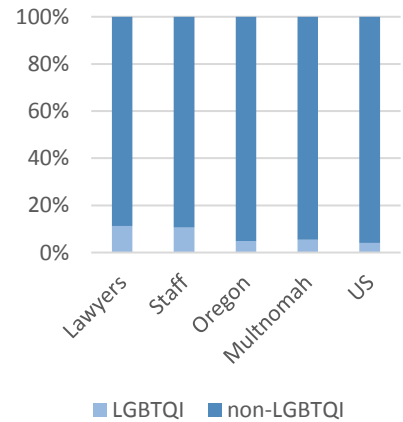
Workers who Identify as having Disabilities



Workers who Identify as an Ethnic Minority



Workers who Identify as LGBTQI



160 Attorneys

132 Staff

Gender, ethnicity, and disability statistics from <https://www.census.gov/quickfacts/fact/table/multnomahcountyoregon,OR,US/SEX205210#viewtop>

LGBTQI statistics from <http://news.gallup.com/poll/203513/vermont-leads-states-lgbt-identification.aspx> and http://news.gallup.com/poll/182051/san-francisco-metro-area-ranks-highest-lgbt-percentage.aspx?utm_source=Social%20Issues&utm_medium=newsfeed&utm_campaign=tiles

Our finances

December 31, 2017, unaudited financials. Once completed, audited financial statements will be available upon request.

Assets	
Cash & Cash Equivalents	\$30,415
Investments	\$5,945,900
Receivable, Accrued IOLTA Interest	\$134,248
Prepaid Expenses	-
Other Assets	\$20,000
Total Assets	\$6,130,563

Liabilities & Net Assets	
Liabilities	
Accounts Payable	\$237,757
Due to Oregon State Bar	\$50,893
Fiscal Sponsorship Payable	\$1,313
Total Liabilities	\$289,963
Net Assets	
Unrestricted	\$853,448
Temporarily Restricted	\$4,415,642
Permanently Restricted	\$571,511
Total Net Assets	\$5,840,601
Total Liabilities & Net Assets	\$6,130,564

Revenue	
IOLTA Income	\$1,157,057
Contributions	\$18,409
Fiscal Sponsorship Contributions	\$138,903
Unrealized Change in Investment Value	\$223,831
Investment Income	\$133,729
Other Income	\$1,026
Total Revenue	\$1,672,955

Expenses	
Grants	\$1,846,535
Civil Legal Needs Study	\$65,240
Fiscal Sponsorship Disbursements	\$142,523
IOLTA Service Charges	\$4,324
Salaries & Benefits	\$175,216
Administrative Charge - OSB	\$35,094
Professional Services	\$26,065
Other Expenses	\$19,806
Total Expenses	\$2,314,803

Change in Net Assets	(\$641,849)
Net Assets at Beginning of Year	\$6,482,450
Net Assets at End of Year	\$5,840,601

Get to know us

13

Total board members.

9

Lawyer board members.

4

Banker board members.

3

Positions appointed by the Oregon State Bar.

1

Position appointed by the Oregon Supreme Court.

1

Position nominated by the Association of Oregon Legal Services.

Board

Traci Ray (President '17)

Barran Liebman LLP
Portland, Oregon

Kamron L. Graham, J.D.

Portland, Oregon
Oregon Supreme Court Appointee

Bernie Thurber (President '18)

Portland, Oregon

Ethan Knight

US Attorney's Office
Portland, Oregon

Elisa Dozono (President-Elect '18)

Miller Nash Graham & Dunn LLP
Portland, Oregon

Brena Lopez

Department of Justice
Salem, Oregon

Kerry Tymchuk (Secretary '17)*

Oregon Historical Society
Portland, Oregon

David Rosen

High Desert Law, LLC
Bend, Oregon

Elise Bouneff (Secretary '18)

Columbia Bank
Portland, Oregon

Hon. David Schuman

University of Oregon School of Law
Eugene, Oregon

Randy Compton (Treasurer)

Pioneer Trust Bank
Salem, Oregon

Laura Shipley

Bank of America
Portland, Oregon

Valerie Colas*

Office of Public Defense Services
Salem, Oregon

Kathleen J. Rastetter

Portland, Oregon
OSB Board of Governors Liaison

Kristen Connor

Heritage Bank
Portland, Oregon

* Kerry Tymchuck's term ended in 2017 and Valarie Colas's term began in 2018.

Staff

Judith Baker

Executive Director

Annalisa Baskett

Administrative Assistant

Bill Penn

Assistant Director

Our Leadership List

Our work would not be possible without the generosity of the Oregon financial institutions that choose to pay a leadership rate and the lawyers who choose to bank with them. When lawyers use the leadership list, the OLF gets up to 125x more funding.

1.25%

Minimum interest rate paid by Visionary Banks.

Visionary Banks

Beneficial Bank

OnPoint Credit Union

Columbia Bank

Pioneer Trust Bank

Heritage Bank

Washington Trust Bank

Lewis & Clark Bank

Wells Fargo Bank

Northwest Bank

Willamette Valley Bank

1.00%

Minimum interest rate paid by Advocacy Banks.

Advocacy Banks

Bank of Eastern Oregon

Pacific West Bank

First Interstate Bank

Premier Community Bank

First Republic Bank

Umpqua Bank

0.01%

Lowest rate net of fees paid on IOLTA by an Oregon bank.

Where you bank matters!