



2018 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 president

Thirty years ago, Oregon lawyers voted 2 to 1 to implement mandatory IOLTA. That vote created sustained funding for the OLF. To date, since 1983, the OLF has delivered over \$35 million primarily to nonprofits providing civil legal help to low-income Oregonians. Our grantees help people protect their families, their homes, and their livelihoods. Those who receive civil legal help lead more stable lives allowing them to escape poverty and stabilize their families and their communities. Below are highlights from 2018:

Revenue & Grants

The OLF received approximately \$1.7 million in IOLTA revenue in 2018. This is an increase of \$600 thousand compared to 2017 and was \$300 thousand above budget projections. Increased revenue allowed the OLF to increase grants to \$1.2 million for 2018 and allowed the OLF to begin to rebuild its reserves. Reserves play an important role in smoothing out funding for grantees when IOLTA income declines. At the end of 2018, the board projected additional revenue increases for 2019 allowing the OLF to budget over \$1.5 million for 2019 grants.

Leadership Banks & Credit Unions

In 2018, the OLF succeeded in raising the interest rates for its Leadership Banks & Credit Unions for the first time since 2009. Nearly all existing Leadership Banks increased their rates, and new banks joined. 2018 also brought the first OLF Leadership Credit Union. During 2018, Visionary Banks & Credit Unions paid 1.25% and Advocacy Banks & Credit Unions paid 1%. For 2019, the OLF increased rates again to 1.75% for Visionaries and 1.50% for Advocates. Current Leadership Banks & Credit Unions appear at the end of this report.

Barriers to Justice

In 2018, the OLF wrapped up the research phase of its new Civil Legal Needs Study and released the *Barriers to Justice* report at the beginning of 2019. With the results of this study, our grantees will be better equipped to meet the goal of justice for all. Read the study at OLF.osbar.org/LNS

Where you bank matters!

We owe our continued success to our partnership with Oregon's Leadership Banks & Credit Unions who choose to pay above-market rates on IOLTA. We also owe our success to our partnership with Oregon's lawyers who insist their banks be committed to the OLF and justice for all. **Where you bank matters!**

How we focus our funding

\$1.20M

Annual grants made in 2018.

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.

\$35M

Funds granted by the Oregon Law Foundation 1982–2018.

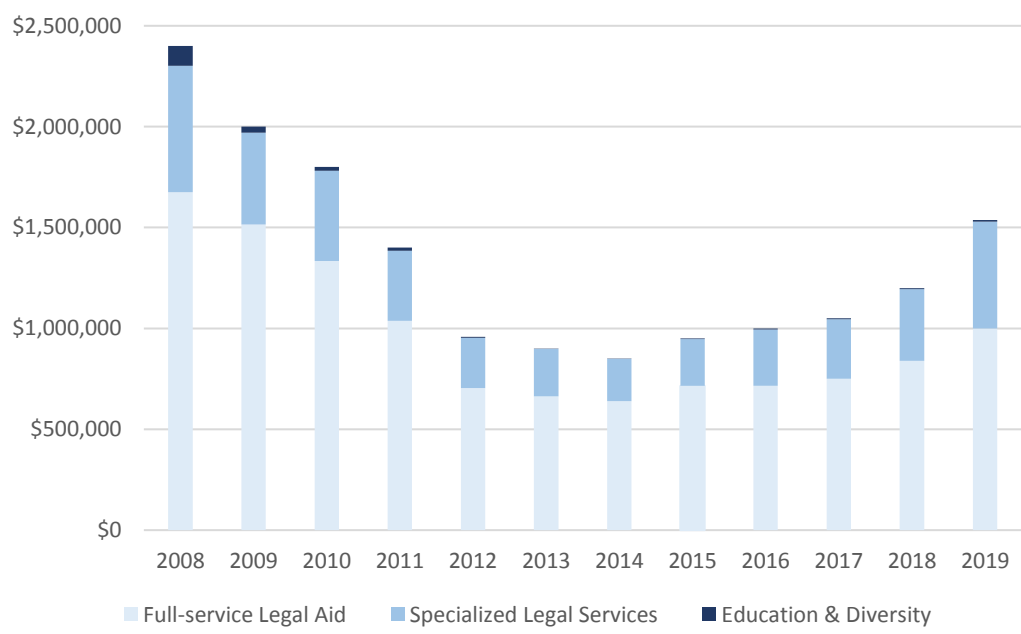
Category B: specialized legal services – 15% to 25% of grants

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



75%

Legal Problems are Widespread: 75% of survey participants live in a household that experienced a legal problem in the previous 12 months.

5.4

Legal Problems Multiply: 5.4 legal problems were suffered by the typical low-income household in Oregon in the last 12 months.

84%

The Need for Legal Aid Outpaces Resources: 84% of people with a legal problem did not receive legal help of any kind.

\$1.18M

Funds disbursed by the Oregon Law Foundation in 2018 from Mortgage Settlement funds to address foreclosure issues and community redevelopment legal services.

A new legal needs study for Oregon

With the support of the Oregon Department of Justice, the 2018 Civil Legal Needs Study was commissioned by the Oregon Law Foundation, Oregon State Bar, Oregon Judicial Department, Campaign for Equal Justice, Legal Aid Services of Oregon, and the Oregon Law Center to assess the current ability of low-income individuals to access the civil justice system. This process started at the beginning of 2017 and resulted in the *Barriers to Justice* report released at the beginning of 2019 and available from the Oregon Law Foundation website.

The study is the first statewide assessment of civil legal needs in Oregon conducted since 2000. In addition to gathering information from the broad population of low-income Oregonians, the study is also one of only a few statewide legal needs studies in the nation to have sought data specifically from migrant farmworkers.

This legal needs study will help the Oregon Law Foundation's grantees serve the legal needs of Oregon's most vulnerable residents.

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 2018, the foundation disbursed over \$1.18 million to organizations providing foreclosure legal help, housing legal help, small business legal help, immigration legal help, and employment legal help. Most grants are on track to complete by the end of 2019. A statewide foreclosure legal help grant is on track to continue through 2020, and a statewide housing legal help grant is on track to continue through mid-2022.

How our grantees helped

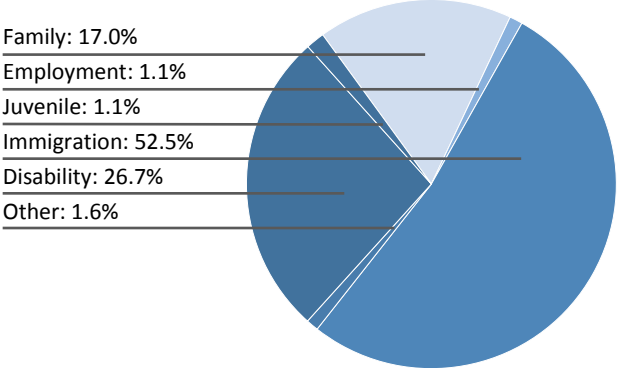
Legal subject areas addressed

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 2018. Numbers reflect the percentage of cases closed in categories by both staff and pro bono volunteers during 2018. More informal assistance like know your rights trainings and legal education materials that do not result in a case being opened are not captured in these charts.

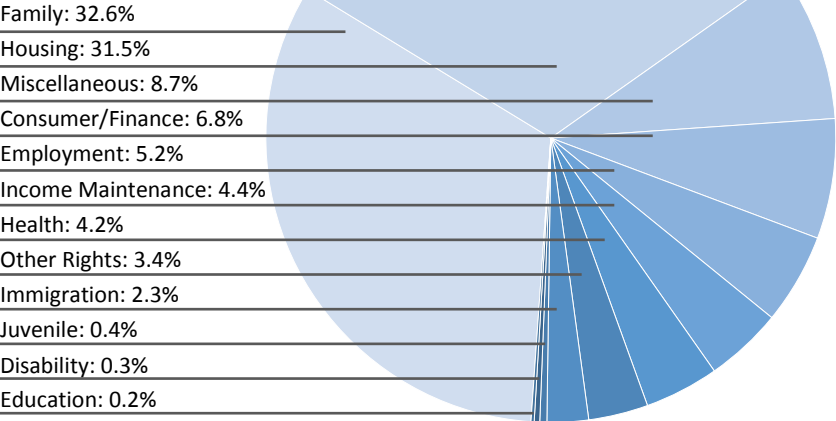
21,406

Total number of cases closed by OLF Grantees.

Specialized legal services



Full-service legal aid



Engaging pro bono attorneys: full-service legal aid

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 as case workers. In 2018, Pro bono volunteers handled twenty-four percent of cases closed by OLF's Category A, full-service legal aid, grantees.



Providing the right level of service: all grantees

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.

Twenty percent of cases closed in 2018 by OLF grantees (counting staff and pro bono cases) were extended service cases.



Our grantees

Total 2018 Grants – \$1,200,000

Association of Oregon Legal Services Programs – \$840,000

The Association provides civil legal assistance to low-income Oregonians statewide through a network of offices in 17 communities. Assistance is coordinated and centered on the needs of the client community. Legal Aid Services of Oregon, Oregon Law Center, and Center for NonProfit Legal Services make up the Association.

St. Andrew Clinic – \$110,000

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) – \$109,000

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) – \$40,000

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) – \$30,000

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 – \$20,000

NWJP / NEED Fund provide 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.

SOAR Immigration Legal Services – \$20,000

SOAR Immigration Legal Services provides culturally competent, immigration-related legal representation, and education to low-income refugees and immigrants in and around the Portland metro area.

Multnomah Volunteer Lawyer Project – \$11,000

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.

Homeless Youth Law Clinic – \$10,000

The Homeless Youth Law Clinic provides legal services and advocacy to Portland area youth experiencing homelessness. HYLC relies on a community lawyering model where clients are the experts.

Youth, Rights & Justice – \$5,000

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 – \$5,000

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.

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 and boards. Here is how the diversity of our grantee’s workers compares to Multnomah County, Oregon, and the nation.

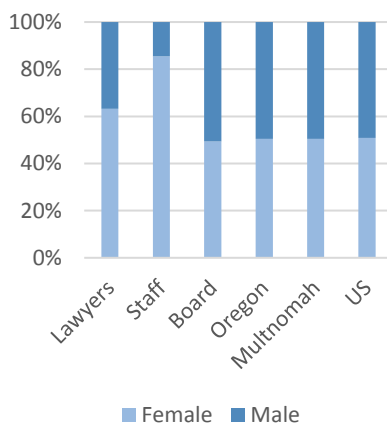
63%

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

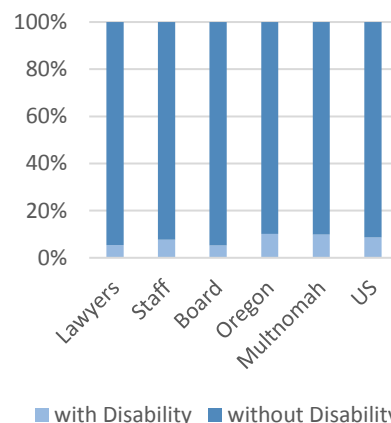
85%

Percentage of grantee staff who identify as female.

Gender Identity



Identifying as Having Disabilities



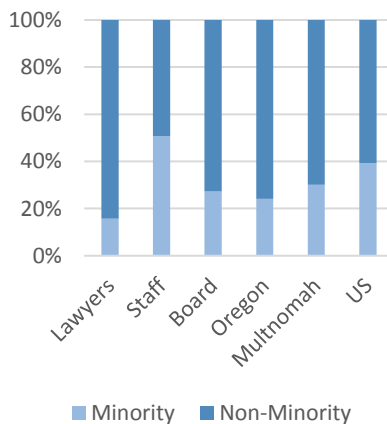
16%

Percentage of grantee lawyers who identify as a racial or ethnic minority; compared to 24.2% of the Oregon population.

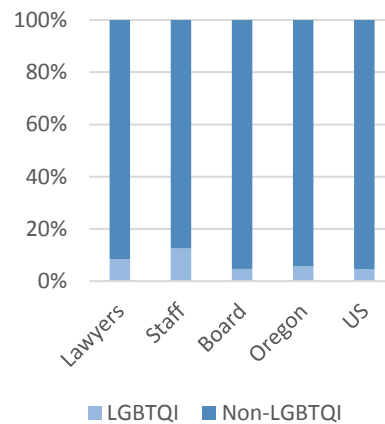
51%

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

Identifying as an Ethnic Minority



Identify as LGBTQI



166 Attorneys

144 Staff

Gender, ethnicity, and disability statistics from <https://www.census.gov/quickfacts/fact/table/or.multnomahcountyvoregon.US>

LGBTQI statistics from <https://williamsinstitute.law.ucla.edu/wp-content/uploads/LGBT-Population-Estimates-March-2019.pdf>

Our finances

December 31, 2018, unaudited financials. Audited financial statements will be available upon request.

Assets	
Cash & Cash Equivalents	\$10,020
Investments	\$4,775,346
Receivable, IOLTA Interest	\$189,397
Prepaid	-
Other Assets	\$20,000
Total Assets	\$4,994,763
Liabilities & Net Assets	
Liabilities	
Accounts Payable	\$87,970
Due to Oregon State Bar	\$33,051
Fiscal Sponsorship Payable	\$1,375
Total Liabilities	\$122,396
Net Assets	
Unrestricted	\$890,266
Temporarily Restricted	\$3,410,590
Permanently Restricted	\$571,511
Total Net Assets	\$4,872,367
Total Liabilities & Net Assets	\$4,994,763
Revenue	
IOLTA Income	\$1,712,906
Contributions	\$5,529
Fiscal Sponsorship Contributions	\$3,427
Unrealized Investment Change	(\$124,214)
Investment Income	\$120,700
Other Income	\$20
Total Revenue	\$1,718,368
Expenses	
Annual Grants & Contributions	\$1,222,500
Supplemental Grants	\$1,036,995
Civil Legal Needs Study	\$179,264
IOLTA Service Charges	\$3,216
Salaries & Benefits	\$169,000
Administrative Charge - OSB	\$27,817
Professional Services	\$26,051
Other Expenses	\$21,759
Total Expenses	\$2,686,602
Change in Net Assets	-\$968,234
Net Assets at Beginning of Year	\$5,840,601
Net Assets at End of Year	\$4,872,367

Get to know us

Board

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.

Bernie Thurber (President '18)

Portland, Oregon

Elisa Dozono (President '19)

Miller Nash Graham & Dunn LLP
Portland, Oregon

Ethan Knight (President-elect '19)

US Attorney's Office
Portland, Oregon

Elise Bouneff (Secretary)

Columbia Bank
Portland, Oregon

Randy Compton (Treasurer)

Pioneer Trust Bank
Salem, Oregon

Valerie Colas

Office of Public Defense Services
Salem, Oregon

Kristen Connor

Heritage Bank
Portland, Oregon

Kamron L. Graham, J.D.

Portland, Oregon
Oregon Supreme Court Appointee

* Brena Lopez's term ended in 2018 and Justin Thorp's term began in 2019.

Brena Lopez*

Department of Justice
Salem, Oregon

Traci Ray

Barran Liebman LLP
Portland, Oregon

David Rosen

High Desert Law, LLC
Bend, Oregon

Hon. David Schuman

University of Oregon School of Law
Eugene, Oregon

Laura Shipley

Bank of America
Portland, Oregon

Justin Thorp*

Sherman Sherman Johnnie & Hoyt LLP
Salem, Oregon

Kathleen J. Rastetter

Portland, Oregon
OSB Board of Governors Liaison

Staff

Judith Baker

Executive Director

Bill Penn

Assistant Director

Laura Greer

Administrative Assistant

Leadership Banks & Credit Unions

Our work would not be possible without the generosity of the Oregon Leadership Banks & Credit Unions that choose to pay above-market rates and the lawyers who choose to bank with them. When lawyers use Leadership Banks & Credit Unions, the OLF gets up to 175x more funding.

1.75%

Minimum interest rate paid by Visionary Banks.

Visionaries

Beneficial Bank

Pacific West Bank

Columbia Bank

Pioneer Trust Bank

Heritage Bank

Washington Trust Bank

Lewis & Clark Bank

Wells Fargo Bank*

Northwest Bank

Willamette Community Bank

OnPoint Credit Union

Willamette Valley Bank

1.25%

Minimum interest rate paid by Advocacy Banks.

Advocates

Bank of America†

Oregon Pacific Bank

Bank of Eastern Oregon

Summit Bank*

First Interstate Bank

Umpqua Bank†

First Republic Bank‡

* pays leadership rate on balances over \$50,000

† pays leadership rate on balances over \$100,000

‡ pays leadership rate on balances over \$250,000

0.01%

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

Where you bank matters!