



# 2021 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 Executive Director

## Change

2021 brought big changes to the Foundation. In September long-time Executive Directory Judith Baker retired. Under Judith's leadership, the Foundation massively increased revenue with the Leadership Bank and Credit Union Program, weathered the near decade interest doldrum that spilled out of the 2008 financial crisis, and shepherded Oregon's share of US Department of Justice mortgage lending settlement dollars to services that continue to help those dealing with housing issues. Judith's joyful leadership will be missed.

## Maintaining Grant Levels

The Oregon Law Foundation worked to keep funding as consistent as possible for grantees in 2021. Despite the fact that 2020 brought significantly lower interest rates that persisted through 2021, annual grants decreased by only 16%.

Reserves built during 2018 and 2019 made it possible to issue \$1.6 million in 2021 annual grants. Careful budgeting projected that on top of IOLTA revenue, reserves could likely maintain this grant level for several years. Stability of funding for grantees and stability of services for the public is important. I am proud that the careful financial stewardship of the Foundation helps make stable services possible.

## Getting to Consensus on Civil Legal Information – the Portal Project

In 2020, the Foundation allocated funding to build consensus in Oregon for a civil legal information portal. The consensus building process continued through 2021 with the Oregon State Bar emerging as the entity willing to house an improved legal information site for Oregon. In late 2021, Legal Aid Services of Oregon was awarded a Technology Initiative Grant from the Legal Services Corporation to begin website development.

Years of plain language information development lie ahead and long-term funding for the portal remains an item to resolve, but Oregon is now firmly on track to provide high-quality legal information when people need it, no matter where they are, and in a form they can understand and act on. The Foundation plays an important role in promoting research and resources that are larger than any single one of its grantees. Like our 2018 civil legal needs study and our 2019 economic impact study, I hope the portal project continues to deliver value to Oregon for a long time.

## 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 accounts. We also owe our success to our partnership with Oregon's lawyers who insist that their banks be committed to the OLF and committed to justice for all. For a list of Leadership Banks and Credit Unions please go to [www.oregonlawfoundation.org](http://www.oregonlawfoundation.org)



**William Penn**  
Executive Director

# How we focus our funding

\$1.63M

Annual grants made in 2021.

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 80% of grants

Organizations that were part of the Association of Oregon Legal Services Programs as of January 1, 2001, 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.

\$46M

Funds granted by the Oregon Law Foundation 1982–2021.

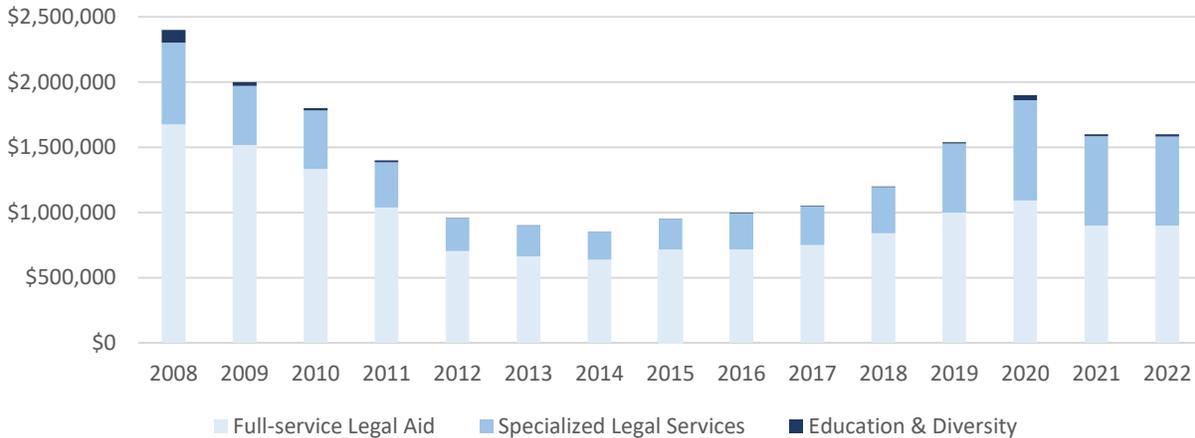
## Category B: specialized legal services – 15% to 35% of grants

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



\$567k

Funds disbursed by the Oregon Law Foundation in 2021 from Mortgage Settlement funds to address foreclosure issues and community redevelopment legal services.

# Mortgage Settlement 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 2021, the foundation disbursed just over \$567 thousand to organizations providing community development legal assistance related to housing.

# How our grantees helped

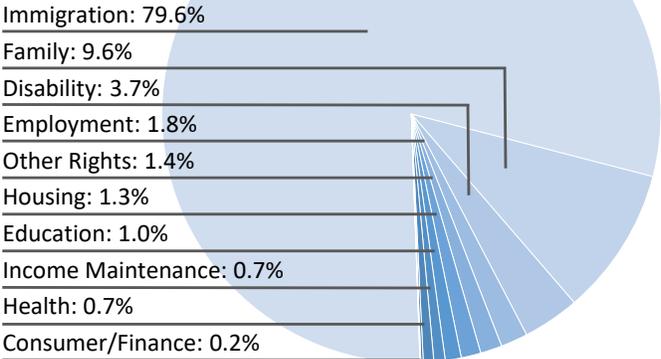
## Legal subject areas addressed

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 2021. Numbers reflect the percentage of cases closed in categories by both staff and pro bono volunteers during 2021. 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.

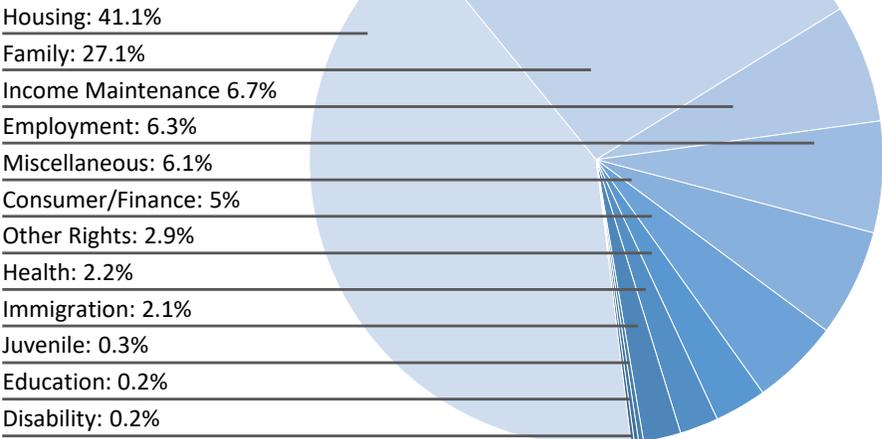
# 18,544

Total number of cases closed by OLF Grantees in 2021.

### 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 2021, pro bono volunteers handled sixteen 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.

Eighteen percent of cases closed in 2021 by OLF grantees (counting staff and pro bono cases) were extended service cases.



# Our grantees

Total 2021 Grants – \$1,600,000

## **Association of Oregon Legal Services Programs – \$900,000**

The Association provides civil legal assistance to Oregonians with low incomes 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.

## **Immigration Counseling Service (ICS) – \$165,000**

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.

## **St. Andrew Clinic – \$125,000**

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 but cannot afford to hire a private attorney.

## **Disability Rights Oregon (DRO) – \$80,000**

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) – \$75,000**

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.

## **New Avenues for Youth – \$50,000**

New Avenues for Youth Legal Clinic is a partnership with the Metropolitan Public Defender and Lewis & Clark Law School providing pro bono legal services to young people experiencing housing instability.

## **SOAR Immigration Legal Services – \$43,000**

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.

## **Immigrant & Refugee Community Organization (IRCO) – \$40,000**

IRCO’s Immigration Legal Services provides affirmative legal services, community education and navigation services, and community clinics.

## **Clackamas Women’s Services – \$32,000**

CWS and A Safe Place are developing the Legal Empowerment Accelerator Program to provide low- and no-cost legal services to victims of domestic and sexual violence and elder abuse and help new lawyers build practices.

## **Northwest Workers’ Justice Project / Northwest Employment Education and Defense Fund – \$30,000**

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.

**Lutheran Community Services NW – \$25,000**

Lutheran Community Services Northwest’s Immigration Counseling and Advocacy Program provides a safe harbor for immigrants and refugees to learn their rights, maximize their legal status, and empower them to make the United States their home.

**Youth, Rights & Justice – \$10,000**

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

**Multnomah Volunteer Lawyer Project – \$10,000**

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.

**Classroom Law Project – \$10,000**

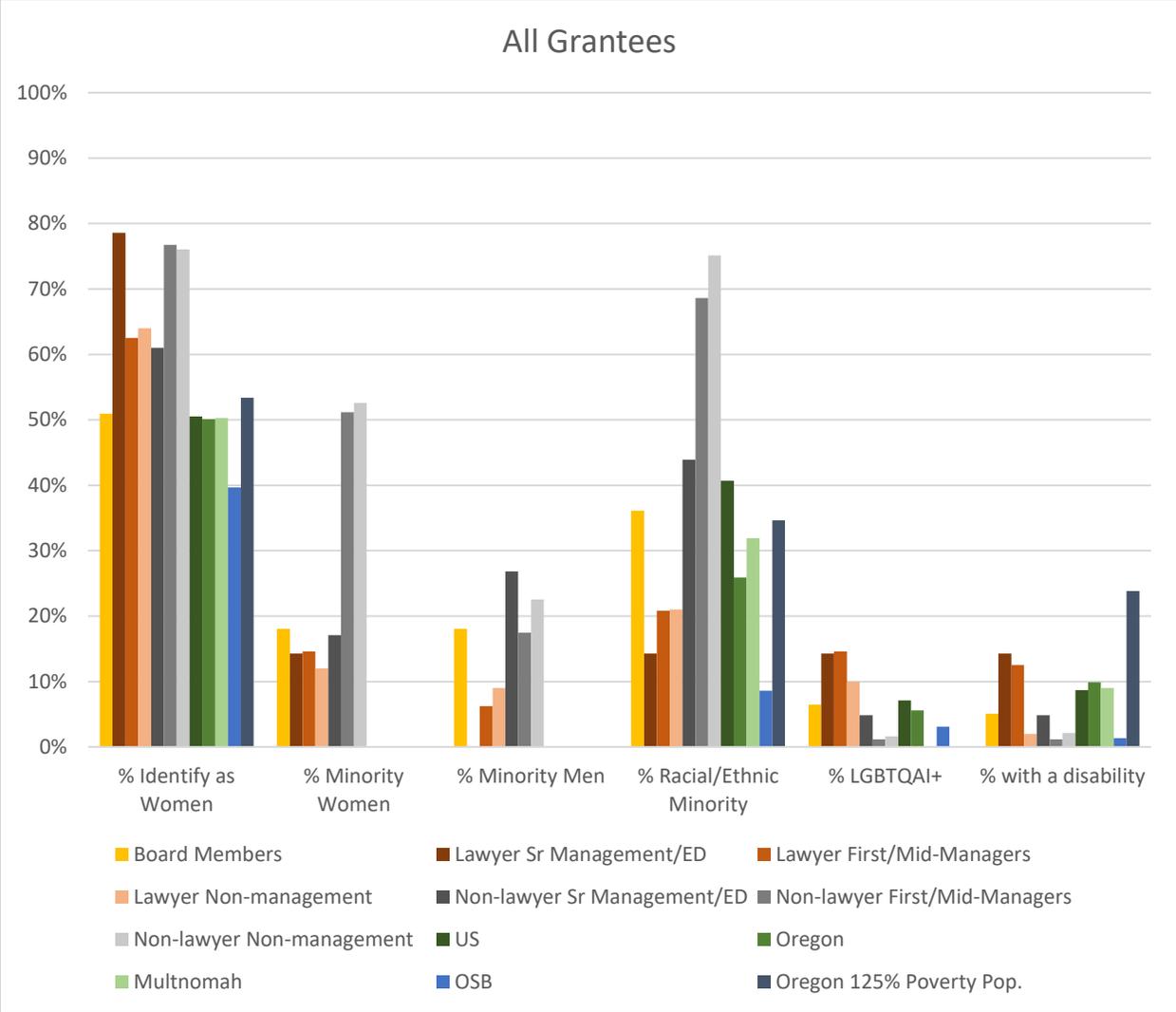
Classroom Law Project promotes public understanding of the law and legal process for 15,000 elementary and secondary students by incorporating the lessons and principles of democracy into the school curriculum.

**Opportunities for Law in Oregon (OLIO) – \$5,000**

OLIO is the Oregon State Bar’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 personally experienced discrimination or oppression; or who can otherwise demonstrate a commitment to advancing the D&I Department’s mission.

# 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 have long reported demographic information about their workers and boards. In 2020, the foundation began collecting additional information to better understand the interaction of staff seniority with gender identity, racial and ethnic background, sexual orientation, and disability status.



US, Oregon, and Multnomah gender, ethnicity, and disability statistics from <https://www.census.gov/quickfacts/fact/table/US,OR,multnomahcountyoregon>

US LGBTQAI statistics from <https://news.gallup.com/poll/389792/lgbt-identification-ticks-up.aspx>

Oregon LGBTQAI statistics from <https://williamsinstitute.law.ucla.edu/wp-content/uploads/LGBT-Adult-US-Pop-Jul-2020.pdf>

OR 125% of poverty guideline population statistics <https://data.census.gov/cedsci/table?q=Income%20and%20Poverty&g=0400000US41&tid=ACST1Y2021.S1703>

**181** Attorneys **560** Staff

# Our finances

December 31, 2021, unaudited financials.

<b>Assets</b>	
Cash Accounts	\$418,665
Investment Accounts	\$2,558,348
Receivable, IOLTA Interest	\$137,559
Prepaid	\$0
Other Assets	\$20,000
<b>Total Assets</b>	<b>\$3,134,572</b>

<b>Liabilities &amp; Net Assets</b>	
<b>Liabilities</b>	
Accounts Payable	\$170,874
Due to Oregon State Bar	\$14,350
<b>Total Liabilities</b>	<b>\$185,224</b>
<b>Net Assets</b>	
Unrestricted	\$1,691,568
Temporarily Restricted	\$686,270
Permanently Restricted	\$571,511
<b>Total Net Assets</b>	<b>\$2,949,349</b>
<b>Total Liabilities &amp; Net Assets</b>	<b>\$3,134,573</b>

<b>Revenue</b>	
IOLTA Income	\$1,514,821
Contributions	\$1,547
Fiscal Sponsorship Contributions	\$644
Unrealized Investment Change	\$204,893
Investment Income	\$43,391
Other Income	\$37,518
<b>Total Revenue</b>	<b>\$1,802,814</b>

<b>Expenses</b>	
Annual Grants & Contributions	\$1,630,000
Supplemental Grants	\$567,020
Fiscal Sponsorship Distributions	\$4,728
Salaries & Benefits	\$228,745
Administrative Charge - OSB	\$36,141
Professional Services	\$42,342
Other Expenses	\$9,095
<b>Total Expenses</b>	<b>\$2,518,071</b>

Change in Net Assets	-\$715,256
Net Assets at Beginning of Year	\$3,664,605
<b>Net Assets at End of Year</b>	<b>\$2,949,349</b>

# 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

### **David Rosen (President '21)**

High Desert Law, LLC  
Bend, Oregon

### **Valerie Colas (President '22)**

Oregon Judicial Department  
Salem, Oregon

### **Hon. Chanpone Sinlapasai (President-elect '22)**

Multnomah County Circuit Court  
Portland, Oregon

### **Elise Bouneff (Secretary)**

Columbia Bank  
Portland, Oregon

### **Randy Compton (Treasurer)**

Pioneer Trust Bank  
Salem, Oregon

### **Kristen Connor**

Heritage Bank  
Portland, Oregon

### **Rima Ghandour**

Ghandour Law  
Portland, Oregon

### **Brent Hall**

Hall Law, PLLC  
Walla Walla, Washington

\* Ethan Knight's and Traci Ray's terms ended in 2021 and Judge Velure and Magali Sosa-Tirado's terms began in 2022.

### **Ethan Knight\***

US Attorney's Office  
Portland, Oregon

### **Traci Ray\***

Barran Liebman LLP  
Portland, Oregon

### **Laura Shipley**

Bank of America  
Portland, Oregon

### **Magali Sosa-Tirado\***

Pamplin Corporation  
Portland, Oregon

### **Justin Thorp\***

Sherman Sherman Johnnie & Hoyt LLP  
Salem, Oregon

### **Bernie Thurber**

Portland, Oregon

### **Hon. Debra Velure\***

Lane County Circuit Court  
Eugene, Oregon

## Staff

### **Bill Penn**

Executive Director

### **Brooke Thacher**

Grants Strategist

### **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 100x more funding.

1.00%

Minimum interest rate paid by Visionary Banks.

## Visionaries

<b>Bank of Eastern Oregon</b>	<b>Oregon Community Credit Union</b>
<b>Beneficial Bank</b>	<b>Pacific West Bank</b>
<b>First Republic Bank<sup>†</sup></b>	<b>Pioneer Trust Bank</b>
<b>Heritage Bank</b>	<b>Washington Trust Bank</b>
<b>Northwest Bank</b>	<b>Wells Fargo Bank</b>
<b>OnPoint Credit Union</b>	<b>Willamette Valley Bank</b>

0.75%

Minimum interest rate paid by Advocacy Banks.

## Advocates

<b>Chase Bank</b>	<b>Oregon Pacific Bank</b>
<b>Columbia Bank</b>	<b>Summit Bank<sup>*</sup></b>
<b>Lewis &amp; Clark Bank</b>	

<sup>\*</sup> pays leadership rate on balances over \$50,000

<sup>†</sup> 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!