

Oregon
State
Bar

2018–2020 DIVERSITY ACTION PLAN

IMPLEMENTATION REPORT: YEAR TWO

MEMBERSHIP SPHERE

GOAL 1 Increase and sustain a diverse OSB and bench.

STRATEGY 1 Identify and gather information on experiences of lawyers from nondominant cultures.

ACTION 1.1.1 Conduct climate surveys.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Create climate surveys to identify the barriers and opportunities faced by lawyers from nondominant cultures in Oregon. COMMUNICATIONS	Complete
2018	Conduct climate surveys. COMMUNICATIONS	Complete
2018	Conduct exit surveys for lawyers from nondominant cultures who leave the state or withdraw from active practice. COMMUNICATIONS	Pending; 2020

Year 1 Summary: The Communications Department and Diversity & Inclusion (D&I) Department collaborated on this action item. The departments worked with community stakeholders, including the ACDI and Oregon affinity bar leaders, to develop questions for the survey. As stakeholder input was received and the survey developed, it was determined that the scope was too broad and the subject matter too personal to fit into a standard online survey. We concluded that it would be appropriate to 1) expand the approach by integrating the focus group and exit survey elements of this strategy (Membership Sphere 1.1.2) into the climate survey process, and 2) appoint a consultant experienced in both research and equity work to facilitate the process and to report on its findings. An RFP was released, and research firm KGR+C, in partnership with the Center for Equity & Inclusion, was retained. KGR+C’s proposed timeline indicates that the process will be complete in the first quarter of 2019.

Year 2 Summary: After further review and consultation with stakeholders, the quantitative survey was conducted from May through July 2019. The survey findings were used to frame focus group discussions with lawyers from five key cohorts: LatinX, Black, Asian/Pacific Islander, LGBTQAI2+, and people with disabilities. (Response rates for Veterans and American Indian/Alaska Native lawyers were too low for conventional significance testing.)

KGR+C Research used the focus group conversations to center the meaning and implication of findings for each group in their lived experiences. Their report combines quantitative highlights of the online survey with qualitative comments from the focus group to present a picture of the law practice climate for the five nondominant cohorts listed above. The report also includes suggestions for addressing specific diversity/equity/inclusion gaps and enhancing the overall climate for law practice in Oregon.

The key findings are contained in KGR+C’s report, which is posted on the OSB website. They are also developing a format for providing bar staff with data sets for further exploration that will not endanger respondent confidentiality. Staff will prepare, for comparison purposes, a baseline of answers for dominant culture correspondents and details on responses concerning bar programs.

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ACTION 1.1.2 Facilitate focus groups to gather feedback on member experiences.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2019	Create and conduct focus groups using the information gleaned from the climate surveys. COMMUNICATIONS	Complete
2020	Report to bar leadership on the focus group findings. COMMUNICATIONS	Complete

Year 1 Summary: Focus groups will be integrated into the climate survey process (see Membership Sphere 1.1.1). There is no change expected to the timing of this action item currently, although it may be completed before the 2020 target.

Year 2 Summary: Please see 1.1.1 above.

ACTION 1.1.3 Analyze lawyer fee rates and economic survey data to identify disparities for lawyers from nondominant cultures.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018–2019	Correlate information gleaned from Action 1.1.1 and Action 1.1.2. COMMUNICATIONS	Pending; 2020
2019–2020	Use the information gathered to identify issues that warrant addressing. MEMBER SERVICES	Pending; 2020

Year 1 Summary: An addendum to the 2017 OSB Economic Survey (https://www.osbar.org/_docs/resources/Econsurveys/17EconomicSurvey.pdf) that focused on women lawyers and lawyers of color was completed in 2018. The results will be analyzed in combination with the results of the climate survey (Membership Sphere 1.1.1), due to be completed early in the first quarter of 2019. Per the timing of these elements, we expect to correlate information on lawyer fee rates and disparities in late 2019.

Year 2 summary: Due to changes in the timeline for conducting and completing the climate survey (1.1.1), these items are pending for 2020.

STRATEGY 2 Ensure the effective retention of diverse bar members, including members from nondominant cultures.

ACTION 1.2.1 Develop D&I programs and other bar resources to support diverse lawyers who are new to Oregon (“lateral hires”), including lawyers from nondominant cultures.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2019	Use the results from the Goal 1, Strategy 1 surveys, and focus groups to identify new program needs. D&I	Pending; 2020
2020	Expand D&I programming to address lateral hire retention. D&I	Pending; 2020
2020	Expand D&I programming to address new member retention. D&I	Pending; 2020

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Year 1 Summary: Pending; expected to complete per original timeline.

Year 2 summary: See Membership Sphere 1.1.1: A draft of the climate survey and focus group results were released at the end of 2019. These will be reviewed to identify new program needs in 2020.

ACTION 1.2.2 Conduct outreach with legal employers to determine best practices for retaining lawyer employees from nondominant cultures.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Collect information from legal employers. D&I	In progress; 2019
2019	Provide revised best practices toolkit to legal employers. D&I	Pending; 2020
2020	Evaluate toolkit and outreach efforts. D&I	Deferred

Year 1 Summary: An initial meeting with managing partners of around 20 Portland firms was held in early 2018. Given the number of people involved, scheduling has been challenging, and information collection was, therefore, not completed in 2018. However, the next meeting is expected to take place in early 2019. The related subsequent action items have been pushed forward accordingly.

Year 2 Summary: The Director of D&I continued to meet individually with managing partners to discuss retention efforts in 2019. Broader meetings with law firms regarding retention efforts will continue in 2020.

Since the meetings with legal employers are ongoing, the OSB Diversity Section voted to put the toolkit on hold until the next steps from the sessions have been established.

ACTION 1.2.3 Develop resources to assist legal employers in creating a diverse workforce.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Create a business case identifying the benefits of employing lawyers from nondominant cultures. D&I	Pending; 2020
2019	Create resources to assist employers with lateral hire retention programs for lawyers from nondominant cultures. D&I	Pending; 2020
2020	Begin to assess the impact and reach of resources. D&I	Deferred

Year 1 Summary: Development of the business case is contingent on the dialogue with legal employers (Membership Sphere 1.2.2), which is ongoing, with a new target date of 2019. In the meantime, research on existing business cases has begun. As part of this work, the D&I Department is considering developing a CLE on the benefits of inclusive hiring practices.

Year 2 summary: See Membership Sphere 1.2.2.

STRATEGY 3 Encourage, support, and promote diverse bar members, including members from nondominant cultures, in seeking judicial positions.

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ACTION 1.3.1 Review the bar’s process for obtaining feedback on judicial candidates to ensure it is qualitative and supports the Diversity Action Council’s (DAC) mission.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Modify bar bylaws to eliminate bar polls for the judicial selection process. PUBLIC AFFAIRS	Complete
2018	Survey stakeholders regarding the judicial screening process. PUBLIC AFFAIRS	Complete

Year 1 Summary: A draft modifying bylaws is under review by the OSB Board of Governor’s (BOG) Policy & Governance and Public Affairs Committees. We plan to seek feedback from stakeholders regarding the judicial screening process in 2019.

Year 2 Summary: Public Affairs Department staff solicited feedback from stakeholders on the proposed bylaws throughout 2019. The BOG then adopted the bar bylaw, eliminating bar polls for the judicial selection process in June 2019.

ACTION 1.3.2 Increase outreach to bar members, including members from nondominant cultures, regarding judicial positions.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Assess notice-of-judicial-vacancy recipient list and webpage placement of notices. PUBLIC AFFAIRS	Complete
2018	Assess placement of judicial vacancy notice to affinity bars and publications. PUBLIC AFFAIRS	Complete
2018	Modify judicial appointment recommendations process to assess cultural competency. PUBLIC AFFAIRS	Complete

Year 1 Summary: The judicial-vacancy-notice recipient list was updated to include affinity bar leaders and other stakeholders. A review of website placement of notices was conducted, and updates were made to increase visibility. Candidate review questions were updated to elicit information on cultural competency.

Year 2 Summary: Completed in 2018.

STRATEGY 4 Engage and collaborate with specialty bars and other organizations to advance diversity, equity, and inclusion in the Oregon legal community.

ACTION 1.4.1 Participate in meetings between affinity bars and OSB leadership to learn about affinity bars’ experiences and perceptions of the OSB as an institution, and of the OSB leadership.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Work with affinity bars as requested to choose a facilitator and develop agendas. EXECUTIVE SERVICES	Complete.
2018	Provide OSB financial support for facilitating dialogue. D&I	Complete.

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2018	Attend the meetings and ensure OSB leadership participation and follow up as appropriate. EXECUTIVE SERVICES	Complete.
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Year 1 Summary: A facilitator was agreed on and retained, and an agenda for the first meeting, which took place in July 2018, was developed. An outcome of the July discussion was to provide equity training for the BOG. The first BOG training session took place in November 2018, and content was on structural racism. Additional BOG trainings will take place in 2019. A plan for continued dialogue meetings in 2019 is to be determined.

ACTION 1.4.2 Increase BOG awareness of and engagement in the work of affinity bars.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Organize a reception in conjunction with a BOG meeting, and invite affinity bars to attend and network with the BOG. EXECUTIVE SERVICES	Complete
2018–2020	Invite affinity bars to attend or submit reports to BOG meetings to report on their activities and events. EXECUTIVE SERVICES	Pending; 2019 – 2020
2018–2020	Ensure BOG representation at affinity bar events. EXECUTIVE SERVICES	Ongoing; 2019–2020 (2018 complete)
2019	Implement changes to the BOG’s participation in affinity bar work, as agreed on during the facilitated joint leadership meetings. CEO	Complete

Year 1 Summary: A joint Multnomah Bar Association (MBA)/OSB reception was held on January 4, 2018, in conjunction with the January BOG Committee meetings. Invitees included leaders from the BOG, OSB Oregon New Lawyers Division (ONLD), MBA, Multnomah Bar Foundation (MBF), MBA Young Lawyers Section (YLS), ACIDI, OSB Diversity Section, MBA Equity, Diversity & Inclusion Committee, OAPABA, OGALLA: the LGBT Bar Association of Oregon, Oregon Hispanic Bar Association (OHBA), OMLA, OC-NBA, OFALA, Oregon Chinese Lawyers Association (OCLA), OWLS, Queen's Bench, and Campaign for Equal Justice (CEJ). A similar reception took place in January 2019.

BOG members attended affinity bar events throughout the year, including the OHBA, OWLS, OAPABA, and OGALLA dinners. Affinity bar leaders were not explicitly invited to attend or submit reports at BOG meetings; however, the BOG president met one-on-one with the chairs of most of the affinity bar groups and attended the OMLA luncheon in the spring of 2018. The 2019 President and CEO are exploring the possibility of attending affinity bar board meetings in 2019 as an alternative method of connecting with affinity bar leaders.

Year 2 Summary: A joint Multnomah Bar Association (MBA)/OSB reception was held on January 10, 2019, in conjunction with the January BOG Committee meetings. Invitees included leaders from the BOG, OSB Oregon New Lawyers Division (ONLD), MBA, Multnomah Bar Foundation (MBF), MBA Young Lawyers Section (YLS), ACIDI, OSB Diversity Section, MBA Equity, Diversity & Inclusion Committee, OAPABA, OGALLA: the LGBT Bar Association of Oregon, Oregon Hispanic Bar Association (OHBA), OMLA, OC-NBA, OFALA, Oregon Chinese Lawyers Association (OCLA), OWLS, Queen's Bench, and Campaign for Equal Justice (CEJ).

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BOG members attended affinity bar events throughout the year, including the OHBA, OWLS, OAPABA, OFALA, OC-NBA, and OGALLA dinners. In addition, the BOG president and CEO attended one board meeting of each of the following affinity bars: OHBA, OAPABA, OFALA, OMLA, and OC-NBA. During these meetings, we provided updates from the OSB, shared services that the OSB has available for affinity and other volunteer bar associations, learned about the work of the affinity bars, and received feedback about the OSB.

ACTION 1.4.3 Assist affinity bars in promoting their activities and events to OSB leadership and OSB membership.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Conduct outreach with affinity bars on the services OSB can provide to the membership. MEMBER SERVICES	Complete
2018	Improve placement and accessibility of affinity bar information on the OSB website. MEMBER SERVICES	In progress; 2019
2018–2020	Invite affinity bars to have a table and to include promotional materials at OSB events to showcase their organizations with membership. MEMBER SERVICES	Ongoing; 2018–2020 (2018 complete)
2019–2020	Include affinity bar events on the OSB website calendar in accordance with OSB communication guidelines. MEMBER SERVICES	Ongoing; 2018–2020 (2018 complete)

Year 1 Summary: Our Director of Member Services met with affinity bar leaders at the end of 2018 to provide a summary of available services and to answer questions about how to access them. Additionally, a new service was implemented in 2018, whereby new membership lists were distributed to affinity bar leadership to support their recruitment efforts. Mission statements and leadership contact information for each of the affinity bars were added to the D&I website, and more visible placement of this information on the primary OSB website is in progress.

Affinity bars were invited to include membership materials in new member packets for the 2018 spring and fall swearing-in ceremonies, and affinity bar events were listed on the OSB website calendar, as requested; both processes are ongoing, and will continue into 2019–2020.

Year 2 Summary: Affinity bars were invited to include membership materials in new member packets for the 2019 spring and fall swearing-in ceremonies, and affinity bar events were listed on the OSB website calendar, as requested; notices to newly admitted bar members now include a link to the improved placement of affinity bar information on the website. All processes are ongoing and will continue into 2020.

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ACTION 1.4.4 Increase OSB technical coordination with specialty bars.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Enhance information sharing with affinity bars for continuing legal education and activities related to OSB functions. MEMBER SERVICES	In progress; 2019
2018	Update and enhance the resource list of OSB services available to membership and communicate to affinity bars. MEMBER SERVICES	In progress; 2019
2018–2020	Provide affinity bars access to OSB membership lists through the public records request process. MEMBER SERVICES	2019–2020: Pending (2018 Complete)

Year 1 Summary: A mechanism for allowing members to join sections at dues payment/renewal was implemented in December 2018. The bar is exploring ways to include general information about the existence of affinity bars and specialty bars to the membership during the dues payment/renewal process and will continue this work in 2019.

On December 10, 2018, OSB staff met with affinity bars to discuss services that the bar provides to its membership. The OSB sought feedback from affinity bars on proposed areas of coordination. OSB will continue exploring these ideas with a plan to have a complete factsheet available in early 2019.

New member mailing lists were provided to affinity bars after swearing-in ceremonies and periodically throughout the year, as part of the bar’s public records request process. The OSB will continue to share new membership lists with affinity bars as requested through 2020.

Year 2 Summary: There were three DEI trainings for the BOG in 2019 (*Impact vs. Intent; Intercultural Conflict; White Privilege; and Learning to Lead as Full Diversity Partners*). BOG training sessions will continue in 2020.

STRATEGY 5 Support an effective pipeline of diverse law students, including those from nondominant cultures, who feel sustained, welcomed, and encouraged to practice law in Oregon.

ACTION 1.5.1 Increase D&I program effectiveness.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Analyze current effectiveness based on data, current trends, and known issues. D&I	In progress; 2020
2019	Implement changes to D&I programming based on findings of the analysis, to provide opportunities for law and pre-law students, including professional connections, legal experience, and financial support. D&I	Pending; 2020
2019	Formalize D&I program applicant criteria and review the application process to ensure fairness, transparency, and applicant pool reach. D&I	Pending; 2020
2020	Review progress based on implemented changes. D&I	Pending; 2020

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Year 1 Summary: Data for D&I programs dating back to 1998 was collated, and participant surveys for 2018 D&I programs were released and analyzed. A process was developed to facilitate an effective and consistent means of tracking and recording program developments, updates, and findings, to support decision making for future program development. Completion of program analysis is expected in early 2019, contingent on the timing of new software being implemented.

The D&I Department introduced two new programs in 2018. The Collaboration and Partnership program was introduced to support community stakeholder work in retention and access to justice. Rebar is a holistic program designed to help JDs retaking the bar exam through a bar preparation course, in-person classes to develop testing skills and address known challenges, and mental health and personal support from the Oregon Attorney Assistance Program (OAAP).

Year 2 Summary: Program data collection continued for the year and is up to date through 2019.

Due to court decisions, D&I will review application criteria and processes in 2020.

ACTION 1.5.2 Support diverse law students in Oregon, including students from nondominant cultures, through mentorship and community building, to encourage them to practice in Oregon upon graduation.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Collaborate with Oregon law schools and other partners to create a robust and effective Opportunities for Law in Oregon (OLIO) orientation program. D&I	Ongoing; 2018–2020 (2018 and 2019 complete)
2019	Implement Oregon Council on Legal Education and Admissions to the Bar (OCLEAB) agenda item asking Oregon law schools to report on their diversity trends. ADMISSIONS	Complete
2020	Review progress based on implemented changes. D&I	Pending; 2020

Year 1 Summary: OLIO Orientation took place in August 2018 in Welches, Oregon. In addition to 49 students, we welcomed approximately 90 attorneys and other legal professionals, who presented on a wide range of content. The membership was invited to attend OLIO continuing education programming. Included in the event were also 11 judge participants, representatives from each of Oregon’s affinity bars, plus members of the ONLD, OAAP, ACDI, and BOG. Student feedback, both anecdotal and via completed surveys, was overwhelmingly positive. Eighty-seven percent of survey respondents strongly agreed or agreed to the following statement: “I am leaving OLIO feeling better prepared for law school and beyond.”

Diversity trend reporting was included as an agenda item at the October 2018 OCLEAB meeting; it was agreed that D&I reports would be a standing agenda item for all future OCLEAB meetings. (See also Membership Sphere 2.4.1.)

Year 2 Summary: OLIO Orientation took place in August 2019 in Welches, Oregon, with the theme of “*What Do You Wish You’d Have Known as an Incoming Law Student?*” In addition to the 48 student participants, 120 attorneys were presenting on a wide range of content. Judges, affinity bar leaders, members of the ONLD, OAAP, ACDI, and BOG also participated in the program. Student feedback, both anecdotal and via completed evaluations, was overwhelmingly positive. One hundred percent of survey

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respondents agreed or strongly agreed with the statement, “I am leaving OLIO feeling better prepared for law school and beyond.”

STRATEGY 6 Increase lawyer engagement in community organizations that encourage individuals from nondominant cultures to pursue a legal education.

ACTION 1.6.1 Create awareness in the legal community about existing programs, to encourage individuals from nondominant cultures to pursue a legal education.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Create a list of schools with pre-law programs, high schools with mock trial programs, and other educational organizations with school engagement initiatives. D&I	Replaced
2019	Work with affinity bars, sections, committees, and other bar members to encourage member participation in the programs. D&I	Replaced
2020	Obtain program feedback to evaluate effectiveness and reach. D&I	Replaced

Year 1 Summary: We will consider the value of the 2018 target measure and how it can best support our program goals in 2019.

Year 2 Summary: The D&I Department will redirect resources to focus on attorney retention efforts.

GOAL 2 Identify and work to eliminate barriers in the legal profession for members from nondominant cultures.

STRATEGY 1 Increase OSB efforts to educate members on the value of diversity, equity, and inclusion.

ACTION 2.1.1 Review the applicable minimum continuing legal education (MCLE) rules and regulations to determine whether programs approved for access-to-justice credit support the DAC’s mission.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Identify any changes needed to the MCLE rules and regulations. D&I	Complete
2019	Secure MCLE Committee and Supreme Court approval of changes to MCLE rules and regulations. GENERAL COUNSEL.	Redirect for 2020

Year 1 Summary: The D&I Department, MCLE Committee, and ACDI have been collaborating on proposed revisions to the MCLE Rules and Regulations, beginning with the statement of purpose. Work on the proposed revisions to the rules and regulations will continue into 2019, with a final recommendation from the D&I Department and ACDI anticipated by mid-2019. The timing for requesting approval from the MCLE Committee, BOG, and Supreme Court is therefore expected as planned in late 2019.

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Year 2 Summary: Proposed changes to the MCLE Rules and Regulations were submitted in December 2019 by the ACDI to the MCLE Committee for review. Some of the changes were approved for submission to the BOG. The proposed changes will be considered by the BOG in early 2020.

ACTION 2.1.2 Sponsor, promote, and encourage elimination-of-bias CLE programming, including implicit bias, equity, systemic racism, institutional racism, etc.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Deliver programming regarding Oregon Rule of Professional Conduct 8.4. CLE SEMINARS	Complete

Year 1 Summary: The following seminars were developed: *The ABCs of Oregon Legal Services: Accessibility, Barriers, and Challenges* (June 2018); *The State of the Union: Masterpiece Cakeshop and Other LGBT Law Developments* (September 2018), and *The Science of Implicit Bias* (November 2018).

Year 2 Summary: “Practicing Inclusion: How to Best Represent Clients with Disabilities” was approved for 2 access to justice credits out of 6 total CLE credits. The Litigation Institute planning committee developed a program in late fall 2019 for the 2020 Litigation Institute that focused on implicit bias in litigation practice. The program was approved for 3.5 access to justice credits out of 7 total CLE credits.

ACTION 2.1.3 Promote Legal Employers Toolkit to legal employers.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Work with the OSB Diversity Section to complete the toolkit. D&I	Pending; 2020
2019	Distribute the toolkit. D&I	Deferred; 2020
2020	Obtain feedback from toolkit recipients. D&I	Deferred

Year 1 Summary: An RFP for completing the toolkit was released, and a consultant retained. Since the toolkit will be informed by the climate survey (Membership Sphere 1.1.1) and information gathered from legal employers (Membership Sphere 1.2.2), the new target date for toolkit completion is 2019.

Year 2 Summary: The OSB Diversity Section voted to put the toolkit on hold while the meetings with legal employers are in progress (Membership Sphere 1.2.3). Related target measures have been deferred accordingly.

ACTION 2.1.4 Publish articles in the Bulletin related to diversity, equity, and inclusion.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Develop a plan for soliciting potential diverse contributors/subjects for articles COMMUNICATIONS	Complete
2018	Develop a process for inviting affinity bars to submit article ideas or written submissions for publication in the Bulletin. COMMUNICATIONS	Ongoing; 2019–2020
2018	Consider developing a regular column on diversity, equity, and inclusion. COMMUNICATIONS	Complete

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2019–2020	Publish articles supporting and promoting diversity, equity, and inclusion within the legal profession. COMMUNICATIONS	Ongoing; 2019–2020
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Year 1 Summary: The Bulletin planning process includes regular coverage of OSB priorities, including diversity, equity, and inclusion. New efforts at outreach were implemented in 2018, including meeting with the ACDI to help recruit members for possible pieces and to seek content suggestions. In 2019, a new Editorial Advisory Committee will assist with planning and oversight of the publication; one of the new committee’s charges is to “Ensure that multiple and diverse perspectives are considered in planning and publishing all editorial content.”

Year 2 Summary: Staff continue outreach to affinity bars and other stakeholders to ensure a diversity of voices in all sections of the Bulletin. In addition to the new editorial policies, staff have developed a checklist of items for contract writers to consider, which includes the importance of diverse voices in all feature articles. Topics covered in features and profiles during 2019 include OSB’s diversity commitments (President’s feature); the definition of “Indian” and Native identity; barriers to justice for low-income Oregonians, including populations facing additional challenges due to race, ethnicity, disability, immigration status, and other characteristics; and isolation as an issue for diverse lawyers in the workplace. A new column: “Diversity, Equity & Inclusion” debuted in the May edition, and will alternate with other regular columns on law practice management, legal history, etc.

STRATEGY 2 The BOG functions in a way that is open and inclusive of different perspectives and experiences.

ACTION 2.2.1 Task the Board Development Committee with assessing needs and with using the assessment to provide programming for the BOG on diversity, equity, and inclusion.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018–2020	BOG members conduct a self-assessment on bias (e.g., implicit bias test from the Harvard Project Implicit [https://implicit.harvard.edu/implicit/takeatest.html]). CEO	Ongoing; 2018–2020 (2018 complete)
2018–2020	Include at least one session on implicit bias, institutional racism, or equity principles for BOG members each year. CEO	Ongoing; 2018–2020 (2018 complete)

Year 1 Summary: The BOG’s Board Development Committee discussed strategies for self-assessments during its May and June meetings. The BOG continued this discussion during its June meeting. President Nordyke (OSB President 2018) strongly encouraged BOG members to take the Harvard Project Implicit online implicit bias tests. This action item continues into 2019 and 2020.

BOG members attended a half-day equity training session in November 2018 that focused on leading organizational change. The program was led by a facilitator with experience presenting to state bars. This action item continues into 2019 and 2020.

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Year 2 Summary: There were four DEI trainings for the BOG in 2019 (*Impact vs. Intent; Intercultural Conflict; White Privilege; and Learning to Lead as Full Diversity Partners*). BOG training sessions will continue in 2020.

ACTION 2.2.2 Adopt a BOG policy to review all bar programs, services, and activities with impact on lawyers from nondominant cultures as a factor for evaluation.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Policy is reviewed by BOG Policy & Governance Committee and BOG. CEO	Complete
2018	Implement the policy and incorporate it into BOG orientation materials and online resources. CEO	Complete

Year 1 Summary: At the June 2018 BOG meeting, the BOG’s Policy & Governance Committee recommended that the BOG adopt a program review policy that includes an impact on lawyers from nondominant cultures as a factor for evaluation. The new policy has been implemented and was used to evaluate a proposed new leadership academy, and is included in online resources.

Year 2 Summary: N/A

STRATEGY 3 Support an open and inclusive award selection process for all OSB groups.

ACTION 2.3.1 Encourage transparency in the award nomination and selection processes.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018-2019	Develop a policy and nomination form template for section awards. MEMBER SERVICES	In progress; 2020
2019–2020	Encourage and assist sections and the Oregon New Lawyers Division (ONLD) with promoting their award nomination process to affinity bars. MEMBER SERVICES	ONLD Complete; Sections Pending- 2020

Year 1 Summary: A nomination form template and suggested process has been drafted and is under review. Our target date for the final version is June 2019, just before most sections begin their award nomination process.

Year 2 Summary: The ONLD reviewed its process for recruitment and selection of award recipients, and in an effort to be more inclusive, the division expanded its notification seeking award nominations to all affinity and specialty bars in 2019. The division also utilized a committee to select award honorees rather than its prior method of allowing the chair to choose recipients unilaterally.

A template and revised process guiding sections on their award process is still underway.

STRATEGY 4 Review the admissions process to determine whether all applicants are treated equitably under the admission rules and procedures.

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ACTION 2.4.1 Create policies and procedures establishing the appropriate collection and use of demographic data from applicants.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Review current rules, policies, and procedures to determine best practices for collecting and using demographic data. ADMISSIONS	Complete
2019	Make changes to policies and procedures as needed to safeguard data collected from being used or made available for an admission decision related to any particular applicant. ADMISSIONS	Complete
2020	Make changes to policies and procedures, where necessary, to appropriately collect and use demographic data for statistical analysis. ADMISSIONS	Pending; 2020

Year 1 Summary: Research into data collection practices of other state bars was conducted. The October 2018 OCLEAB agenda included a request to hear from law schools about trends in law school applications, law school admissions processes, and standards, and overall job market data, including information on job placements for recent graduates. Oregon’s law schools reported on their incoming classes and the general job market for new lawyers, and they engaged in a productive discussion with the OSB’s D&I Director regarding ideas to keep applicants from nondominant cultures in Oregon. Each law school reported that it had its most diverse class yet. Each dean offered to share demographic data with the D&I Department. The Council agreed that D&I reports would be part of all future OCLEAB meetings.

Year 2 Summary: A review of Admissions Department policies and procedures showed that we immediately remove any voluntary demographic data in an applicant’s file. This policy will continue when we move to an online application and will happen automatically rather than relying on staff to remove the data. Therefore, our protections will be even more robust when we move to the online application.

ACTION 2.4.2 Collect data from the OSB Admissions Department, Oregon law schools, and applicants, to identify admissions trends of demographic groups.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2020	Ask OSB applicants to self-identify as part of the application process. ADMISSIONS	Pending; 2020
2020	Begin to review data with respect to identifying admissions trends by demographic. ADMISSIONS	Pending; 2020

Year 1 Summary: Implementation is expected in 2020 per the original target date.

Year 2 Summary: Implementation of this action item is expected in 2020 per the original target date.

GOAL 3 Enrich the OSB by increasing the diversity of member representation in volunteer and leadership roles.

STRATEGY 1 Educate OSB member groups on the value of diversity, equity, and inclusion.

ACTION 3.1.1 Create a benefit statement supporting the value of diversity.

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TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Seek input from affinity bars and other stakeholders in creating the benefit statement. MEMBER SERVICES	Complete; 2019
2018	Gather baseline data to determine current member involvement in OSB volunteer and leadership roles. MEMBER SERVICES	Complete
2019	Distribute the benefit statement to bar groups. MEMBER SERVICES	Complete; 2019
2020	Evaluate the effectiveness of these education efforts, based on changes identified in overall volunteer participation. MEMBER SERVICES	Pending; 2020

Year 1 Summary: Baseline data for 2018 volunteers was gathered and evaluated based on four broad categories of OSB involvement: committees, discipline boards, member-elected groups (i.e., BOG and HOD), and self-elected groups (i.e., ONLD and OSB sections). In looking at the four self-reported demographic areas, data indicated committee members are significantly more likely than the other OSB volunteer types to report their demographic information. In turn, the data showed higher participation of historically underrepresented groups in all four demographic categories compared to OSB membership data. Please refer to the report appendix (pages 44-46) for a summary of this baseline data.

Year 2 Summary: In 2019, volunteer data was again gathered and reviewed. No significant changes were noted from the 2018 data. Because most volunteer terms are more than one year in length, the makeup of a volunteer board or committee does not change drastically from year to year. However, one issue that affects the results of the data tracking is the number of members who self-report continues to increase as new bar members are admitted to practice. This issue has been flagged, and it is under consideration of how and when to begin requesting member input on demographic questions again.

STRATEGY 2 Increase diversity on all OSB self-electing boards and in membership elected positions.

ACTION 3.2.1 Encourage a diverse pool of candidates for BOG and House of Delegates (HOD) elections.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018–2020	BOG members actively encourage diverse members, including members from nondominant cultures, to run for vacant positions on the BOG and HOD (annually). MEMBER SERVICES	Ongoing; 2020 (2018 and 2019 complete)
2018–2020	Encourage affinity and local bars to inform their members of BOG and HOD vacancies, including listserv and website postings. MEMBER SERVICES	Ongoing; 2020 (2018 and 2019 complete)
2018–2020	Encourage affinity and local bars to promote the importance of voting in HOD and BOG elections to their membership. MEMBER SERVICES	Ongoing; 2020 (2018 and 2019 complete)

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Year 1 Summary: The BOG Board Development Committee conducted outreach with each of the affinity bars regarding the BOG and HOD elections. Additional members of the BOG and staff engaged with members from nondominant cultures when encouraging members to run for election. When voting opened for the BOG election, affinity bars were asked to encourage their members to participate in the election. See Membership Sphere 3.1.1 regarding baseline data gathered for member-elected volunteers.

Year 2 Summary: The BOG Board Development Committee continued to build relationships with affinity and specialty bar leaders throughout 2018 and 2019. During recruitment for the BOG and HOD elections, Board members engaged leaders from affinity bars and encouraged candidates from nondominant cultures to run for election. When voting opened for the BOG and HOD election, affinity bar leaders were again asked to encourage their members to vote in the election.

ACTION 3.2.2 Increase diversity of member representation on self-electing boards to reflect the diversity of the OSB membership.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	BOG review of ONLD bylaws and policies to ensure the election process is transparent and supports equity and inclusion. CEO	Complete
2018	Meet with sections during the annual meeting process to share the benefit statement (Action 3.1.1). MEMBER SERVICES	Ongoing through 2020
2019–2020	Include demographic data on membership lists and rosters. MEMBER SERVICES	Ongoing; 2020 (2018 and 2019 complete)
2019	BOG review of section bylaws and policies to ensure the election process is transparent and supports equity and inclusion. CEO	Expected for 2020

Year 1 Summary: Proposed changes to the ONLD bylaws relating to the election process were drafted and submitted to the ONLD and ACDI for input. Changes were then submitted to the BOG’s Policy & Governance Committee for approval. The BOG adopted the proposed ONLD bylaws changes at its meeting on November 21, 2018. Changes to the section bylaws will be considered in 2019. The review of section bylaws has been separated out from the ONLD bylaws, and a new target date of 2019 has been added.

OSB’s Director of Member Services met with several sections to discuss the Diversity Action Plan (DAP) in 2018. To support sections in considering diversity as a factor when selecting volunteers for the nominating committee and executive committee slate, the OSB shared members’ self-reported data with select section leaders. See Membership Sphere 3.1.1 regarding baseline data gathered for self-elected board volunteers.

Year 2 Summary: Staff continues to share demographic membership information with section leaders when they are developing annual meeting slates. During this selection period, leaders are reminded of the benefits and suggested methods for ensuring a balanced slate of nominees future executive committee rosters. The Board of Governors is expected to review section bylaws during the summer of 2020.

STRATEGY 3 Encourage diversity of volunteer speakers and planners for CLE events.

MEMBERSHIP SPHERE

ACTION 3.3.1 Provide a resource list of affinity bars to bar groups planning CLE events.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Develop a list of affinity bars and include a description of the affinity bars' mission statements. CLE SEMINARS	Complete
2019	Incorporate the DAC's mission and affinity bars list in CLE co-sponsorship guidelines. CLE SEMINARS	Pending; 2020

Year 1 Summary: The list, which will include mental health and substance use resources in addition to affinity bar information, has been finalized.

Year 2 Summary: Due to changes with respect to court decisions, this action item will be reviewed for possible modifications.

ACTION 3.3.2 Look for opportunities to collaborate with affinity bars for CLE events.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Conduct an inventory of existing bar CLE events that would be suitable for collaboration with affinity bars; evaluate areas for further coordination for affinity bar CLEs. CLE SEMINARS	In progress; 2019
2019	Create a bar CLE resource guide for affinity bars. CLE SEMINARS	Pending; 2020
2020	Distribute the guide and begin CLE event collaboration with affinity bars. CLE SEMINARS	Pending; 2020

Year 1 Summary: An inventory of existing bar CLE events for possible collaboration is being conducted and is expected to be available by the end of June 2019.

Year 2 Summary: Due to changes with respect to court decisions, this action item will be reviewed for possible modifications.

ACTION 3.3.3 Look for opportunities to diversify the pool of CLE speakers.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018-2020	Distribute the Leadership and Volunteer Opportunities CLE Speaker reports to section executive committees annually, with a reminder that the CLE planning committees have this resource and should consider diversity when selecting CLE subject-matter experts. MEMBER SERVICES	Ongoing; 2020 (2018 and 2019 complete)

Year 1 Summary: The Director of Member Services met with section executive committees and shared volunteer lists throughout 2018.

Year 2 Summary: Staff continued to share the speaker volunteer list with sections in 2019 as requested. Further consideration of the effectiveness of this target measure is needed since only a few sections utilize this resource, instead opting to identify speakers they have seen present to other audiences. Additional

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consideration should also be given to developing presentation skills for members who do not have such experience with the goal of widening the pool of potential subject matter expertise who are willing to present at a CLE program.

STRATEGY 4 Collaborate with the BOG and Board Development Committee to increase the diversity of lawyers and public member-volunteers appointed by the BOG.

ACTION 3.4.1 Increase outreach to a diverse group of lawyers and nonlawyers, including individuals from nondominant cultures, for OSB volunteer positions.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Organize an event co-sponsored by the OSB's D&I Department, the BOG, and affinity bars, to explain OSB leadership opportunities, selection processes for OSB volunteer appointments, and application processes for the BOG and HOD. D&I	2019 Complete
2018	Request that affinity and local bars include a link to the OSB Volunteer Survey on their websites. MEMBER SERVICES	Ongoing; 2019–2020 (2018 Complete)
2018-2020	Provide notices of volunteer and leadership opportunities to affinity and local bar organizations for distribution to their members and through their respective newsletters, including to community organizations that support individuals from nondominant cultures. MEMBER SERVICES	Ongoing; 2019–2020 (2018 Complete)

Year 1 Summary: We are reconsidering this event, and will request feedback from affinity bars on whether other approaches would be more valuable.

Recruitment for lawyers and public members was completed in 2018.

Year 2 Summary: The OSB President and CEO met with affinity bar leaders to discuss OSB leadership opportunities.

ACTION 3.4.2 Educate the Board Development Committee members on the need to review appointment recommendations and decisions through an equity lens.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018-2020	Conduct an annual review of appointments with a focus on demographic and geographic factors. MEMBER SERVICES	Ongoing; 2019–2020

Year 1 Summary: The BOG completes its annual appointments cycle in November during its final meeting of the year. A review of the appointments made in 2018 was conducted in January 2019 with the BOG's Board Development Committee.

Year 2 Summary: The BOG completed its annual appointments cycle in November during its last meeting of the year. A review of the appointments made in 2019 was conducted in February 2020 with the BOG's

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Board Development Committee. Further detail on this target is outlined in action item 3.1.1 and is supported by an exhibit in the appendix (pages 58-60).

ACTION 3.4.3 Ensure the appointment process is efficient and effective and that the BOG has enough member information.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Board Development Committee reviews and refines internal processes. MEMBER SERVICES	Complete

Year 1 Summary: The review was conducted. Revisions to processes for appointment were initially implemented during the September 2018 Board Development Committee meeting. The committee will continue to discuss and refine its appointment process as necessary based on results from the annual review of appointments described in Membership Sphere 3.4.2.

STRATEGY 5 Develop a leadership institute for Oregon lawyers who support the mission of the D&I Department, including lawyers from nondominant cultures.

ACTION 3.5.1 Address gaps and barriers to leadership positions within the BOG and affinity bars for underrepresented members of the bar.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Identify gaps and barriers. D&I	In progress; 2020
2019	Craft a proposed course curriculum. D&I	In progress; 2020
2020	Implement the course. D&I	Pending; 2020

Year 1 Summary: The 2018 action item to identify gaps and barriers has been pushed forward to allow for our approach to be informed by stakeholder feedback from the climate survey (Membership Sphere 1.1.1) and the affinity bar dialogue (Membership Sphere 1.4.1.)

As a precursor to the curriculum development process, a cohort of affinity bar leaders and other stakeholders attended the State Bar of Arizona’s Leadership Institute in April 2018, to learn from its approach. The BOG has approved an ad hoc committee to craft a course curriculum, and this work will begin in 2019 in tandem with the preceding target measure to identify gaps and barriers.

Year 2 Summary: The ad hoc Leadership Institute Committee met throughout the second half of 2019 and successfully drafted a Leadership Institute program proposal. The proposed program included a mission statement, goals, advisory board charge, curriculum themes, application criteria, and application questions. This program was approved by the BOG at its November meeting. The Leadership Institute Advisory Board had their first meeting in December 2019 in anticipation of a September 2020 Institute launch.

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STRATEGY 6 Encourage diversity of volunteer editorial review boards and authors for Legal Publications books.

ACTION 3.6.1 Increase representation of diverse members, including members from nondominant cultures, on Legal Publications editorial review boards, and as authors.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Contact local and affinity bars when recruiting new editorial board members and authors. LEGAL PUBLICATIONS	Pending; 2019
2019	Revise Editorial Review Board Guidelines to strongly encourage editorial review boards to consider diversity in identifying potential authors. LEGAL PUBLICATIONS	Pending; 2020
2020	Evaluate the effectiveness of efforts to increase the diversity of editorial boards and author pool. LEGAL PUBLICATIONS	Pending; 2020

Year 1 Summary: Affinity bars were contacted for inclusion in the author recruitment survey for a recent publication. In 2019, we plan to brainstorm additional methods of making editorial boards and author pools more inclusive and to collaborate with the D&I Department on recruitment outreach.

Year 2 Summary: In 2019, the focus for new editorial review boards turned to the issue of professionalism, and including professionalism tips in our publications. As a result, changes to the editorial board guidelines related to the diversity of the author pool have not yet been developed.

ACTION 3.6.2 Include more detailed biographical information and pictures of authors in the front matter of books, to showcase diversity involvement.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Select two publications to include more detailed biographical information. LEGAL PUBLICATIONS	Complete
2019	Increase the number of publications that include detailed biographical information. LEGAL PUBLICATIONS	Ongoing; 2020

Year 1 Summary: The first publication with an extended bio was published in 2018 (*Veterans, Military Service Members, and the Law*). Three more publications are planned for a 2019 release with expanded bios: *ADR in Oregon*, *Construction Law*, and *Insurance Law*.

Year 2 Summary: In 2019, we released two books with extended author bios, including photos, in the front of the books: *Construction Law* and *ADR in Oregon*. Other books released in 2019 did not include extended bios, to maintain consistency with prior books in a series. *Insurance Law*, which has been delayed to 2020, will include extended bios. Going forward, the department plans to include extended bios for all publications.

STRATEGY 7 Evaluate the effectiveness of the New Lawyer Mentoring Program (NLMP) with respect to lawyers from nondominant cultures.

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ACTION 3.7.1 Survey new lawyer participants to determine their level of satisfaction with the NLMP.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Review the existing new lawyer survey and determine whether additional information needs to be gathered. MEMBER SERVICES	In progress; 2019
2018	Modify the survey as necessary and implement it for all new lawyers upon program completion. MEMBER SERVICES	Completed in 2018
2019	Use the information gathered to identify issues that warrant addressing. MEMBER SERVICES	Annually

Year 1 Summary: Staff has reviewed the NLMP Completion Survey and identified several necessary changes to make the data gathered more useful in evaluating the experiences of new lawyer program participants.

Year 2 Summary: After revising the NLMP completion survey in 2018, staff slowly began gathering data to evaluate further the experience participants had through their mentoring relationship. In 2019 alone, 320 new lawyers completed the program, far fewer provided feedback through the NLMP survey, and less than a dozen members from a nondominant culture participated in the survey. Of those who did respond, responses indicated that members had a more favorable feeling toward the mentor with whom they were matched but overall were less satisfied with the program. Additional monitoring and further evaluation of the feedback will be conducted in 2020 to see if it was a sample size issue or a systemic issue.

ACTION 3.7.2 Increase the pool of diverse mentors participating in the NLMP, including mentors from nondominant cultures.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018–2020	Evaluate mentor availability and areas of underrepresentation. MEMBER SERVICES	Annually; 2018–2020 (2018 and 2019 complete)
2018–2020	Conduct targeted outreach to ensure adequate availability of mentors from diverse member groups, including nondominant cultures. MEMBER SERVICES	Annually; 2018 and 2019 complete

Year 1 Summary: Program staff reviewed the pool of mentors and determined that additional recruitment of mentors outside the dominant culture would benefit the program. In early 2019, staff will conduct targeted outreach to affinity bars, specialty bars, and other stakeholders in an effort to increase the availability of mentors from outside the dominant culture.

Year 2 Summary: In 2019, the program saw a decrease in the rate of new mentors volunteering, with only about 50 new volunteers signing up throughout the year. The total number of mentors participating in the program is just shy of 1,800 members, with the demographics of these mentors mirroring those of the OSB membership as a whole. Staff will continue to monitor this, to determine whether new recruitment measures should be taken.

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ACTION 3.7.3 Review NLMP database fields to ensure adequate information is available when matches are made.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Revise NLMP forms as needed. MEMBER SERVICES	Ongoing; 2020 (2018 and 2019 complete)

Year 1 Summary: Current database questions elicit sufficient new lawyer and mentor information to make effective mentor matches. Ongoing consideration is required to determine how to best use mentor information during the matching process.

Year 2 Summary: Feedback from the completion survey suggests sufficient information is obtained from new lawyers and mentors to make effective program matches. See measure 3.7.1 for further detail.

PUBLIC OUTREACH SPHERE

GOAL 1 Increase representation and legal services to underserved and hard-to-reach communities in Oregon.

STRATEGY 1 Assess the civil legal needs of low-income Oregonians statewide, including hard-to-reach populations.

ACTION 1.1.1 Conduct planned Civil Legal Needs Study (CLNS) that provides comprehensive information about the legal needs of low-income Oregonians, including hard-to-reach populations.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Gather and analyze CLNS data. OLF	Complete
2018	Publish and share CLNS data with a wide range of stakeholders. OLF	Ongoing; 2019
2018	Conduct a media campaign to share the results of the CLNS. COMMUNICATIONS	Complete

Year 1 Summary: The CLNS report is complete, and a one-page legislative advocacy piece has been completed using the CLNS data to be used in the 2019 Legislative Session to advocate for increased legal aid funding.

The CLNS will be published and shared with a wide range of stakeholders in 2019, and there will be a media campaign to share the results.

Year 2 Summary: The OSB conducted a media campaign through February and March to share the results of the CLNS, and to supplement legal services advocacy work with the legislature. The study was covered in the Oregonian, Bend Bulletin, Register Guard, Salem Reporter, and Willowa Chieftain. The Oregonian coverage also included editorial support for adequate funding for legal services. Staff also worked with LASO leadership on preparation for additional follow-up interviews in the spring. A key objective for 2020 will be to increase the use of the OSB’s social media platforms to raise awareness with both members and the public of legal services programs and needs.

The CLNS was published in 2019 and has already been used in a number of contexts. At the beginning of the year, results were used to advocate in the Oregon Legislature for increased funding for legal aid. The result is the first increase in legal aid funding since 2011. Beyond the legislature, the LSP worked with communications to attract statewide news coverage of the report’s findings. Legal aid providers have used the CLNS in their most recent strategic planning, and the CEJ is using the CLNS in their fundraising appeals. Additionally, Immigration legal providers have used parts of the CLNS in their fundraising and advocacy. Efforts continue to engage the philanthropic community with the results of the CLNS.

ACTION 1.1.2 Use the results of the CLNS to inform the legal services provided by the integrated statewide legal aid programs in accordance with the OSB Legal Services Program (LSP) Standards and Guidelines.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
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2019	Legal aid providers review the results and use these results on an ongoing basis as a factor when setting priorities for legal services and developing access strategies for low-income Oregonians, including hard-to-reach populations. LSP	Ongoing; 2020 (2019 complete)
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Year 1 Summary: As described in Public Outreach Sphere 1.1.1, preliminary analysis has been completed. The legal aid providers are aware of the results and were involved in preparing the final CLNS report in addition to assisting in the preparation of the one-page legislative advocacy piece. The legal aid providers will use the results of the CLNS coupled with information gathered from local/regional client needs assessments when setting priorities for legal service. This will begin in 2019 and will be an ongoing process.

Information about how the legal aid providers have incorporated the results of the CLNS when setting priorities for legal services will be included in the periodic accountability review of the legal aid providers conducted by the Legal Services Program.

Year 2 Summary: In 2019, the civil legal aid providers engaged in statewide strategic planning. This planning process was initiated to contemplate the use of a large cy pres award, but the timing also allowed for immediate use of information from the CLNS in the strategic planning process. The next accountability review in 2021 will consider the implementation of this new strategic plan based in part on the CLNS.

ACTION 1.1.3 Use the results of the CLNS to inform the access strategies for low-income and hard-to-reach populations by the Oregon State Bar.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2019	Review the results of the CLNS for possible OSB program changes. LSP	Pending; 2020
2020	Develop a plan for implementing access strategies. LSP	Pending; 2020

Year 1 Summary: These target measures are anticipated to be completed as planned. As a stakeholder, the OSB received the final CLNS report early in 2019. A review process will be set up to assess possible OSB program changes with a view to implementing access strategies.

Year 2 Summary: Although the CLNS was received by the OSB in early 2019, a process has not been set up to assess possible program changes. It is anticipated that it will be accomplished in 2020.

STRATEGY 2 Ensure that the integrated statewide legal aid programs are targeting their services based on the most compelling needs of the client community, including hard-to-reach and diverse populations, including nondominant cultures, in accordance with the OSB LSP Standards and Guidelines.

ACTION 1.2.1 LSP staff conduct the accountability process outlined in the Standards and Guidelines.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
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2018	Staff, legal aid providers, and the LSP Committee review the current accountability process and make changes as necessary, including incorporating a review of effective technology. LSP	Complete
2018	Complete the accountability process and submit a report to the BOG. LSP	Complete
2019	Legal aid providers implement recommendations from the 2018 review process. LSP	Ongoing; 2020

Year 1 Summary: The LSP Committee and staff conducted an accountability review of the legal aid providers, and a draft report is complete. Staff and the LSP Committee reviewed the findings with all three legal aid providers in December 2018. The report is scheduled to be submitted to the BOG in early 2019. It is anticipated that providers will address the findings outlined in the report by the end of 2019.

Year 2 Summary: The LSP finalized the 2018 accountability report and presented the results to the BOG in April 2019. Providers have begun to implement the recommendations contained in the report, but some recommendations will take time to implement. The LSP will continue to monitor the progress made by the legal aid providers in 2020. Changes made based on the 2018 report will play a significant role in the next planned accountability review in 2021.

STRATEGY 3 Increase pro bono representation of low-income Oregonians and hard-to-reach populations.

ACTION 1.3.1 Establish a baseline of current pro bono hours.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Using the American Bar Association (ABA) survey results and hours reported by OSB Certified Pro Bono Programs, establish a baseline of pro bono hours. LSP	Complete

Year 1 Summary: The data needed to establish a baseline of pro bono hours has been gathered, including results of the ABA pro bono survey and voluntary reporting data from Oregon attorneys. Analysis needs to be performed in order to use the ABA survey to determine a scaling factor to move from self-reported pro bono hours to an estimate of pro bono hours performed. Analysis of the CLNS performed by the Oregon Law Foundation (OLF) may allow for an additional assessment of the number of individuals under 125 percent of the poverty level helped by pro bono attorneys.

Year 2 Summary: Efforts were made to compile pro bono statistics from the three information sources available to the bar: the ABA Survey information regarding pro bono completed in 2016, the Civil Legal Needs Study estimate of pro bono cases completed in 2017 and OSB member self-reported pro bono hours from the 2017 Pro Bono Roll Call.

In the ABA survey, 60% of respondents reported doing some pro bono work in 2016, and for those reporting some time, the average number of hours completed was 74.4. Extrapolating from the report that 14.3% of respondents to the Civil Legal Needs Study who received legal help got that help from a volunteer or unpaid attorney suggests that around 18,000 households below 125% of the poverty level

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received support from a pro bono attorney in 2017. The Pro Bono Roll Call for 2017 saw 9.7% of active attorneys, 1,481, report doing a total of 45,210 hours of direct representation pro bono work. Further attorneys reported in the 2017 Roll Call that they performed an average of 30.5 hours of direct representation pro bono.

Because all three of these data sources have their own limitations and peculiarities, comparing the three to each other is nearly impossible. Instead of there being a single baseline number for pro bono, there is a collection of baseline numbers related to pro bono. Each set of numbers is valuable in its realm and may be compared over time with other figures gathered in a similar way.

Next Steps: The Roll Call occurs annually, and there is a fifteen-year data set related to the roll call. For the other statistics to be updated, the Bar will have to decide to the membership or the public.

ACTION 1.3.2 Use the results of the ABA pro bono survey to develop strategies that are focused on nondominant cultures and hard-to-reach populations.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Identify barriers to lawyers doing pro bono work and develop a plan for addressing them. LSP	Pending; 2020
2019	Implement the plan to address barriers to lawyers doing pro bono work. LSP	Pending; 2020
2020	Survey OSB membership on pro bono work. LSP	Pending; 2020

Year 1 Summary: Of the top barriers to doing pro bono work identified by the ABA Pro Bono Survey, seven are related to time: fears of not having enough time to do pro bono work and worries that pro bono work would take more time than expected. These time concerns show the need to have discrete pro bono opportunities. These opportunities might be carefully defined unbundled services, implementing ABA Free Legal Answers, or encouraging more providers to conduct drop-in or “advise and refer” clinics.

Also, present in the top ten barriers reported were concerns related to the subject area of pro bono work: fears of not having sufficient knowledge of practice areas and of not having an interest in the subject areas in which pro bono cases are available. Rounding out the top ten was a preference to do nonlegal volunteering.

An approach to addressing some of these barriers might be through marketing—communicating that pro bono is doable, even if you are not a subject expert, pro bono is satisfying no matter the subject area, and pro bono makes an important difference in people’s lives.

The ABA survey also identified features that could encourage Oregon attorneys to volunteer. Of the top ten, three elements are already provided by the Oregon State Bar: malpractice insurance, CLE credit for pro bono work, and free or reduced-cost CLEs—indicating a need for more publicity about the availability of these features (the Certified Pro Bono Program, credit provided for volunteering, and the free CLEs offered through the Pro Bono Fair and Celebration). Another takeaway from the ABA survey was that asking judges and prominent attorneys to help encourage volunteering might be an effective tactic to increase pro bono participation.

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Other features lawyers thought would encourage pro bono work were offering limited-scope cases or allowing attorneys to select cases. These features seem to relate to the time concerns survey participants brought up in the barrier section. Some attorneys indicated a desire to pair with another attorney or mentor through pro bono, and a few mentioned administrative or research support as elements that would be helpful.

The work to identify a plan for addressing these barriers and identifying further barriers will be conducted in 2019. Depending on the details of the plan, it will begin in 2019 or 2020.

Year 2 Summary: Although a central plan to address the identified pro bono barriers was not developed in 2019, steps were taken based on the identified barriers. First, the pro bono website was updated to draw attention to the regulations already in place to encourage pro bono: CLE credit, softened conflict rules, and Liability coverage for Certified Programs. Second, the Pro Bono Committee has been exploring developing advise and refer “lawyer in the library” clinics. The library model, exemplified by the Deschutes County “Lawyer in the Library” program, provides a pro bono model where lawyers encounter fixed times to volunteer, fixed duration to providing legal help, and with a focus on issue spotting and identifying next steps requires only limited knowledge and ability.

Next Steps: with the help of the Pro Bono Committee, a lawyer in the library program will be assessed, and a plan for eliminating barriers will be implemented in 2020. Consideration will also be given to whether repeating a survey similar to the 2020 ABA pro bono survey would be helpful.

ACTION 1.3.3 Continue to monitor the use of the ABA Free Legal Answers resource.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Determine whether ABA Free Legal Answers will work as a resource for the OSB. LSP	Pending; 2020
2019	Implement, if identified as an appropriate resource. LSP	Pending; 2020

Year 1 Summary: We are waiting on IT resources and software implementation before this target measure can be tackled. The new target year is, therefore, 2019.

Year 2 Summary: We continued to wait for the capacity to tackle ABA free legal answers. Work was done to address staff concerns about the quality of work provided through ABA Free Legal Answers and adequate consumer protection. The LSP is presently working with legal aid and the courts to assess opportunities to improve online pro se resources. Further action on ABA free legal answers has been put on hold until that resource assessment is completed. The new target year is, therefore, 2020.

STRATEGY 4 Increase representation through increased funding for the integrated statewide legal aid programs to increase access for low-income Oregonians, including underserved and hard-to-reach communities in Oregon.

ACTION 1.4.1 Use the CLNS to inform banks about the scope of the unmet legal needs of low-income Oregonians to support increased legal aid funding in Oregon.

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TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Increase Leadership Bank Program interest rate tiers to coincide with the Federal Reserve Bank increases. OLF	Complete
2018	Incorporate CLNS results into talking points to work with the Oregon Bankers Association and the banking community, to increase interest rates on Interest on Lawyer Trust Accounts (IOLTA) held in Oregon. OLF	Complete
2019	Continue to monitor interest rate increases and adjust Leadership Bank Program interest rates as needed.	Complete

Year 1 Summary: In 2018, the OLF Revenue Enhancement Committee developed a strategy, based on an increasing federal funds interest rate, to work with banks to increase the interest rate they pay on IOLTA deposits. The strategy included making an adjustment to the OLF’s Leadership Bank interest tiers for IOLTA deposits. All but one of the Leadership Banks committed to increase rates beginning January 1, 2019.

Once the CLNS report is complete, it will be shared with the banking community, along with talking points that underscore the importance of paying an above-market interest rate on IOLTA deposits to impact legal aid services to low-income Oregonians. This target measure will take place in 2019.

Although the OLF will continue to monitor interest rates throughout 2019, the OLF has made the decision that the January 1 increase is the only adjustment the OLF plans to make to its Leadership Banks interest rate tiers in 2019.

Year 2 Summary: In 2019, The OLF continued to monitor interest rates and work with banks to maximize IOLTA interest revenue. Because the Federal Reserve Board reduced interest rates three times in 2019, the OLF lowered the interest rate that banks needed to pay to be part of the Leadership Bank Program. The OLF did this on December 1, 2019. Even though the FRB lowered interest rates three times, the OLF Leadership Banks continued to pay at the leadership rate through the end of November. During a year of continuing falling interest rates, the OLF had only one bank opt-out of being in the Leadership Bank Program.

ACTION 1.4.2 Use the CLNS to inform the legislature about the scope of the unmet legal needs of low-income Oregonians to support increased legal aid funding in Oregon.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Establish a diverse network of leaders to support relevant issues and trends. PUBLIC AFFAIRS	Complete
2018	Meet with justice system partners during the interim period to discuss legislative concepts and funding priorities. PUBLIC AFFAIRS	Complete
2019	Present information on access to justice to lawyer-legislators and bar members, to ensure message consistency. PUBLIC AFFAIRS	Complete

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Year 1 Summary: Meetings with leaders and coalition partners have been ongoing in 2018, including an initial meeting with coalition partners using the CLNS data to ensure message consistency.

Year 2 Summary: Meetings with legislative leaders and coalition partners took place throughout 2019, including sponsored events with the Citizens’ Campaign for Court Funding and Day at the Capitol. Legal aid funding was successfully increased by \$300,000, with future biannual increases expected. The CLNS was completed at the beginning of the year. Results were used to inform the legislature about the scope of the unmet legal needs of low-income Oregonians and to advocate for increased funding for legal aid. The result is the first increase in legal aid funding since 2011.

ACTION 1.4.3 Conduct media outreach campaign to support funding efforts.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Develop and execute a CLNS media outreach campaign. COMMUNICATIONS	Complete

Year 1 Summary: The CLNS report is complete. OSB Media Relations staff has begun meeting with the OLF and our partners in the legal services community to craft a strategic outreach campaign. We expect this to be a key focus of work in early 2019, followed by additional effort throughout 2019 to capitalize on news hooks and other emerging opportunities.

Year 2 Summary: See year two summary. (1.1.1)

ACTION 1.4.4 Explore partnering with the philanthropic community on the importance of funding legal aid to alleviate poverty.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Work with The Lawyers’ Campaign for Equal Justice (CEJ) and legal aid providers to develop a plan to partner with the philanthropic community. OLF	In progress; 2019-2020
2019	Implement the plan. OLF	Pending; 2019-2020

Year 1 Summary: The OLF Executive Director has taken steps to become more familiar with Grantmakers of Oregon and Southwest Washington (GOSW) and received permission from the OLF board to join in December 2018. This allows the OLF to interact and connect with the broader philanthropic community, which will enhance the ability of the OLF, the CEJ, and legal aid to partner with the philanthropic community. This target measure’s timeline was not met due to lack of time and the impact of the OLF department being understaffed.

Year 2 Summary: The OLF has become a member of GOSW, and the executive director has connected with members of the philanthropic community. So far, individual contact with other members of the philanthropic community at events has been more successful than efforts to provide information and panel discussions to large groups.

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GOAL 2 Ensure all Oregonians are able to access the bar’s public protection programs.

STRATEGY 1 Engage in outreach to marginalized communities regarding the availability and purpose of the bar’s public protection programs.

ACTION 2.1.1 Develop relationships with community organizations working in the public protection arena.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Identify and create a list of potential community partners. GENERAL COUNSEL	Complete
2019	Have a discussion with a representative from each identified group. GENERAL COUNSEL	Pending; 2020

Year 1 Summary: The OSB General Counsel’s Office, in partnership with the Lawyer Referral Service has developed a list of community partners. We are in the process of reviewing the list to determine our upcoming outreach strategy. In September 2018, bar staff presented at the Immigration Nonprofit Working Group’s 2018 Immigration Forum for Service Providers, to outline bar public protection programs and services available to Oregonians. The forum was attended by approximately 200 representatives from local nonprofits who work directly with underserved populations. In 2019, we will continue discussions with community partners.

Year 2 Summary: In early 2019, General Counsel’s Office conducted outreach to nonprofit service organizations to share materials regarding the bar’s public protection programs. The target date for one-on-one discussions has been moved to 2020.

ACTION 2.1.2 Design and utilize a toolkit for member and public outreach on public protection programs.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Create program descriptions for public protection programs and collect related application and complaint forms to form a public protection programs toolkit. GENERAL COUNSEL	Completed
2019	Discuss and review the toolkit with representatives from community organizations and member representatives. GENERAL COUNSEL	Pending; 2019
2020	Share the toolkit with targeted audiences. GENERAL COUNSEL	Pending; 2020

Year 1 Summary: A description of public protection programs has been developed for use in the toolkit. Translations of all complaint/claim forms in six languages (Arabic, Russian, Simplified Chinese, Somali, Spanish, and Vietnamese) have been completed. A process for receiving and responding to complaints received in these languages is being developed in preparation for these complaint forms being released.

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Year 2 Summary: In October 2019, bar staff from the General Counsel’s Office and the Lawyer Referral Service presented at the 2019 Immigration Service Providers Forum at Portland State University. Staff prepared and provided an OSB Resource Guide that summarized the available public protection programs, which was also available in Spanish. Staff also distributed materials related to the bar’s *notario* fraud prevention program and bar protection programs, including the Client Security Fund, Client Assistance Office, Unlawful Practice of Law Program, and Fee Dispute Resolution program.

STRATEGY 2 Develop a comprehensive approach for providing English-language learners access to the bar’s public protection programs.

ACTION 2.2.1 Develop policy to enable access to programs for persons who speak, read, or write languages other than English.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Evaluate staffing and other resources in relation to language needs. GENERAL COUNSEL	In progress; 2019
2019	Write and adopt a policy providing that individuals who file complaints in languages other than English have full access to programs. GENERAL COUNSEL	In progress; 2019
2020	Develop multilingual complaint/application forms and informational materials for public protection programs. COMMUNICATIONS	In progress; 2020

Year 1 Summary: The Client Assistance Office (CAO) is exploring the use of live interpreter services to enable communication with members of the public concerned about a lawyer’s conduct in Oregon when we are unable to effectively communicate in English or Spanish (for which sufficient resources already exist). We are developing a pilot program in which the bar will utilize interpreting and translation services to respond to written complaints received in a language for which we lack in-house language resources.

The OSB website currently includes a translation tool option, allowing a user to translate information about the complaint process, and complaint forms may be submitted online; however, we recognize that these translation tools may not provide high-quality translation. Because of this, we will continue to explore options to improve the user experience of English-language learners on the OSB website. For instance, in 2018, we released a Spanish language video regarding the CAO complaint process on the OSB website. See also Public Outreach Sphere 2.1.2.

Year 2 Summary: In early 2019, General Counsel’s Office updated a staff member’s job description to require bilingual English/Spanish skills as a vital component of the position. This staff member regularly translates CAO bar complaints, Client Security Fund and Fee Dispute Resolution inquiries, and answers questions from Spanish-speaking callers. Other languages are addressed on a case-by-case basis; for instance, in 2019, CAO was able to obtain translation services for a bar complaint received in Vietnamese.

STRATEGY 3 Ensure that the operation of the bar’s public protection programs is fair, safe, and welcoming to all.

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ACTION 2.3.1 Collect demographic data and feedback from users who access the bar’s public protection programs.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Explore methods to collect data. COMMUNICATIONS	Complete.
2019	Collect user demographic data and seek feedback on user experience. COMMUNICATIONS	Pending; 2020

Year 1 Summary: Regulatory and Communications staff developed an online survey to assess user experiences based on the framework of procedural fairness. The survey includes a demographics section, allowing staff to compare the experiences of users from differing backgrounds. A link to the new survey will be included in notifications that a CAO or Disciplinary Counsel’s Office (DCO) matter has been closed.

Year 2 Summary: Implementation was first delayed by competing priorities and staffing changes. Returning to the project later in the year, staff decided on a new approach that would focus more keenly on DEI issues in a format that multiple bar programs could use to get consistent and actionable feedback. Data collection will begin in the first quarter of 2020.

ACTION 2.3.2 Analyze demographic data and feedback from users who access the bar’s public protection programs.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Analyze the data collected. GENERAL COUNSEL	Pending; –2020
2019–2020	Meet with members, stakeholders, and possible community partners identified in Action 2.1.1, to discuss data and seek additional feedback. CEO	Pending; 2020
2020	Identify approaches for creating a safer and more welcoming public protection program process. GENERAL COUNSEL	In progress; 2020
2020	Develop a plan to implement approaches. GENERAL COUNSEL	Pending; 2020

Year 1 Summary: Feedback from users is not scheduled until 2019; the timing of this item has been updated accordingly.

The OSB’s General Counsel is working with Oregon judges on approaches for creating a safe and more welcoming public protection program process based on principles of procedural fairness. In April 2018, Multnomah County Circuit Court judges made a presentation to bar staff and disciplinary board on implementing a procedural fairness program, as developed by the National Center for State Courts, at OSB.

We are developing a survey tool to benchmark procedural fairness goals to share with people who interact with the bar’s public protection programs.

Year 2 Summary: We have increased procedural fairness in the disciplinary process by providing procedural uniformity in all proceedings, stemming from the adoption of the Adjudicator model. We have

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also improved transparency in the process by making all Disciplinary Board decisions immediately available for public review.

ACTION 2.3.3 Coordinate with the work of the Oregon Supreme Court Council on Inclusion and Fairness (OSCCIF).

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018-2020	Participate in and support the work of the OSCCIF. CEO	Ongoing; 2019–2020 (2018 complete)

Year 1 Summary: Chief Justice Balmer established the OSCCIF in 2016 to monitor and assist in the implementation of the Oregon Judicial Department’s (OJD) Strategic Plan related to access, inclusion, and fairness and to identify and coordinate efforts to integrate inclusion and fairness principles in all OJD practices and procedures. The OSB’s CEO was appointed to the OSCCIF as the OSB representative. In 2018, the CEO requested that the Chief Justice appoint the OSB Director of D&I to the OSCCIF in her stead. The OSCCIF met in March, June, September, and December of 2018. The OSCCIF worked with the OSB and legal aid to collect and coordinate online resources for self-representing litigants. They identified the resources each organization had shared and looked for gaps.

Year 2 Summary: The Director of D&I continued participation in the OSCCIF meetings throughout 2019. One exciting development for OSCCIF was the Court’s hiring of Valerie Colas to provide staff support to the group. During 2019, the Court also developed a strategic plan to address systemic access to justice issues within the judicial system. The OSCCIF has been tasked with the implementation of several elements of that plan in 2020-2021. With the departure of the D&I Director at the end of 2019, the CEO asked that she be reappointed to the group for 2020.

GOAL 3 Expand availability of public education, outreach, and self-navigation materials for underserved Oregon communities.

STRATEGY 1 Develop public legal information materials that are accessible to all Oregonians.

ACTION 3.1.1 Improve the readability of all OSB public legal information materials.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Determine the readability/grade level of existing content, and set a target standard (e.g., “Plain English” 8th-grade reading level). COMMUNICATIONS	Complete
2019	Edit the 30 most accessed topics to meet the new standard. COMMUNICATIONS	In progress; 2019
2020	Edit the next 30 most accessed topics to meet the new standard. COMMUNICATIONS	Pending; 2020

Year 1 Summary: We reviewed 97 legal information topics for readability on the Flesch-Kincaid scale. For reading grade level, our materials ranged from 7.6 to 18.6, with an average grade level of 12.7. Given the

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nature of the material, our target for revisions is 8.0 (8th grade) or lower. Members of the BOG's Public Service Advisory Committee have begun editing selected topics.

Year 2 Summary: We completed only seven revisions in 2019, although others have been assigned to volunteers. With progress so slow, we entered into a partnership with students at Portland State University's Linguistics program to revise additional topics and reformat our web-based materials. Completion of 10-15 per year would be a more realistic goal.

ACTION 3.1.2 Improve access to legal information materials for English-language-learners.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Present all public information materials online in formats that are compatible with the Google Translate app; post professionally translated materials available to the OSB online. COMMUNICATIONS	Complete
2019	Produce professional translation of the 20 most accessed topics in high-demand languages. COMMUNICATIONS	Pending 2020
2020	Produce professional translation of the next 20 most accessed topics in high-demand languages. COMMUNICATIONS	Pending 2020

Year 1 Summary: *Legal Issues for Older Adults 2017 Edition* was professionally translated into Russian, Spanish, Simplified Chinese, and Vietnamese, and it is available for free download from the OSB website. To date, a total of 430 non-English versions have been downloaded: 177 in Simplified Chinese, 123 in Russian, 85 in Vietnamese, and 45 in Spanish. All other materials posted to the public pages are compatible with the Google translate app posted on our public information home page.

Year 2 summary: As the result of a grant opportunity and major legislative changes, we shifted our focus in 2019 to developing Landlord/Tenant materials, our highest-demand legal topic area. We produced a new pamphlet, "New Rules for Landlords," and had it professionally translated into Spanish, Russian, Vietnamese, and Simplified Chinese. We also produced three new landlord/tenant videos: "Landlord/Tenant Overview and Resources," "Oregon's New Rent Control Law," and "Termination Notices." All three videos were presented in English, Spanish, Russian, Vietnamese, and Mandarin Chinese. A fourth video was produced in English, but we did not have funds available for a professional translation for recording in other languages. Instead, we placed a transcript next to the video so visitors can use the Google Translate app (available on all of our public pages) for a workable translation. Without additional funding, professional translation of print materials is likely to prove challenging, and we may continue to focus on video production as a more affordable option that is also more accessible for many people.

ACTION 3.1.3 Increase availability of legal information provided in video and other nontext formats, featuring diverse presenters, including presenters from non-dominant cultures.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Continue the production of Legal Q&A videos in English, Spanish, and other high-demand languages; produce video introductions for OSB public protection programs in English and Spanish. COMMUNICATIONS	Ongoing; 2019–2020

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		(2018 complete)
2019	Produce and promote an instructional video for statewide dissolution forms (petitioner) in English and Spanish, in collaboration with justice system partners. COMMUNICATIONS	Pending; 2020
2020	Produce and promote instructional videos for other statewide family law forms. COMMUNICATIONS	Pending; 2020

Year 1 Summary: Input on video topics was solicited from the BOG’s Public Service Advisory Committee, ACDI, and other groups through outreach by the OSB’s Referral and Information Services (RIS) Manager promoting Lawyer Referral Services (LRS) and Modest Means. This work is ongoing, and attention to diversity in recruiting on-camera presenters as part of our recruitment efforts. To date, we have completed 13 videos in Spanish, including three on the bar’s Client Assistance Office, Lawyer Referral Service, and Modest Means Program, respectively. An additional three videos are available in Vietnamese. The Vietnamese videos and several of the Spanish videos are related to immigration law and were produced in partnership with legal community partner organizations.

Year 2 Summary: Staff worked with the Futures Committee of the Statewide Family Law Advisory Committee on scripting self-help videos for divorce litigants. Progress has been slow, but an introductory video has been completed, and the script for a step-by-step video on filling out petitioner forms has been completed. This project will continue into 2020. The production of Legal Q&A continues, including as discussed in Public Outreach Sphere Action 3.1.2. We currently have 152 videos available on our website, 29 of which are presented in languages other than English.

ACTION 3.1.4 Increase the availability of legal information materials to people with disabilities and special needs.

TARGET DAE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Review online materials for compatibility with screen readers; add captioning for public information videos. IT	In progress; 2019
2019–2020	Continue updating and monitoring of materials. IT	Pending; 2019–2020

Year 1 Summary: This work is being completed on an ongoing basis as the website is updated. The goal is to ensure that all public-facing files and forms are compatible with screen readers. Members of the Bar Accessibility Review Team (BART) are working with each department on creating accessible PDF documents, and the IT Department is assigned with the development of compatible online forms. Communications and CLE staff are working on adding subtitles to already-produced videos and will be testing live captioning for CLE seminars in 2019. This action item, originally under the ownership of the Communications Department, has been reassigned to the IT Department.

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Year 2 Summary: We continue to update webpages and documents and ensure we respond as quickly as possible. Compatibility with screen readers is an ongoing priority. As previously discussed, the cost is the biggest hurdle for the prioritization and success of the overall quality of the OSB website.

STRATEGY 2 Enhance outreach to underserved communities regarding the Modest Means Program and Lawyer Referral Service.

ACTION 3.2.1 Assess current service levels and legal needs of underserved communities.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Compile internal statistics on the Lawyer Referral Service and Modest Means Program, including calls from English-language learners, languages offered by panelists, and website translations. COMMUNICATIONS	Complete
2019	Compare services provided with results of the CLNS to identify underserved communities, and prioritize how the Lawyer Referral Service is meeting their legal needs. LSP	Pending, 2020

Summary: Communications staff gathered data on language use through all the OSB's RIS Department programs, including the LRS and Modest Means Program. Using 2017 as a baseline, we collected data on calls through our Spanish line, panelists who indicate they speak another language and the number of referrals made with an additional language selected (including what the other language was). We can use this data to track subsequent years and whether the numbers increase due to our outreach efforts. Although we are unable to track usage of the online Google Translate app, we do know that the non-English versions of *Legal Issues for Older Adults* have been downloaded 430 times since posting early in 2018.

See Public Outreach Sphere 3.1.3 for website information.

Year 2 Summary: The CLNS was completed in 2019. A comparison of services is planned for 2020.

ACTION 3.2.2 Implement outreach plan to underserved communities, including marketing and coordination with community partners.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Begin outreach to already identified underserved communities. COMMUNICATIONS	Complete
2019–2020	Continue outreach methods and monitor effectiveness. COMMUNICATIONS	Pending; 2020

Year 1 Summary: Outreach efforts in 2018 included the development of a list of community partners and meetings with Disability Rights Oregon, Catholic Charities, Proyecto UNICA, the American Civil Liberties Union (ACLU), the American Immigration Lawyers Association (AILA), and the OAAP. These meetings have already led to partnerships on Legal Q&A videos and volunteer recruitment efforts. The ACDI was asked for additional recommendations. This work is ongoing, in combination with outreach on the LRS and

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Modest Means Program, and will be completed in conjunction with the work outlined in the Public Outreach Sphere Goal 2.1.1.

Year 2 Summary: Outreach efforts in 2019 included development of a list of community partners and meetings with the State Family Law Advisory Committee (SFLAC), the Immigrant Refugee Community Organization, the Asian Family Center, SOAR Immigration Center, Central Latino Americano, the American Immigration Lawyers Association (AILA), and the OAAP. These meetings have already led to partnerships on Legal Q&A videos and volunteer recruitment efforts. The ACDI was asked for additional recommendations. This work is ongoing, in combination with outreach on the LRS and Modest Means Program, and will be completed in conjunction with the work outlined in the Public Outreach Sphere Goal 2.1.1.

STRATEGY 3 Increase issue-based public education, targeting media outlets with legal trends and issues that affect underserved communities.

ACTION 3.3.1 Establish a diverse network of lawyers and bar groups who are leaders in relevant areas of practice.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Work with select committees, sections, and affinity bars to support justice system issues. PUBLIC AFFAIRS	Ongoing; 2019–2020 (2018 complete)
2019	Develop a framework to continue the discussion and coordinate ongoing efforts. PUBLIC AFFAIRS	Complete

Year 1 Summary: Bills that the bar supported in the 2018 legislative session included:

- HB 4008: Prohibits fact finder from determining plaintiff's damages for civil cause of action using calculation for projected future earning potential of plaintiff that takes into account race or ethnicity of plaintiff.
- HB 4095: Establishes privilege for communications with lawyer referral service.
- HB 4097: Modifies provisions relating to law libraries and law library services provided by counties.
- HB 4010: Establishes Task Force on Addressing Racial Disparities in Home Ownership.

Year 2 Summary: Bills that the bar supported in the 2019 legislative session included:

- SB 357: Increase the statutory allocation to legal aid services while establishing an annual increase based on the consumer price index (CPI). Amended into SB 5513.
- SB 358: Expand ORS 9.565 to allow for disclosure of an attorney taxpayer's tax information by the Department of Revenue to the Oregon State Bar for the purpose of disciplinary proceedings. Eliminate the statutory prohibition on charging the membership fee to 50-year members. Modifies provisions regarding submission of certification and disclosures for lawyer trust accounts. Acknowledges the bar's responsibility to regulate the legal profession, support the judiciary, and advance access to

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justice. Acknowledges the inherent authority of the Oregon Supreme Court over the Oregon State Bar and regulation of the profession.

- SB 359: Update the Oregon Business Corporation Act, which is modeled after the Model Business Corporation Act, to provide for ratification of defective shareholder or director corporate action, and a process for affected parties to contest the ratification. Substantially similar changes are proposed for the Oregon Nonprofit Corporation Act.
- HB 2459: Establish a statutory provision under which a person who is an “authorized requester” may send a request in a statutory form to the person who holds an encumbrance against real property for a “lien information statement” to obtain pertinent payoff information.
- HB 2460: Clarify that a transferee is not liable for the purposes of the deferred property tax program if the transferee does not receive an interest in real or personal property from the estate.
- HB 2461: Expands resources available to active service members, including creating a referral list of programs that assist low-income veterans with housing stability. Includes data collection provisions through Oregon Criminal Justice Commission. Amended into HB 2530.
- HB 2462: Establish outreach to service members who have experienced combat injuries. Includes data collection and court outreach in navigating the legal system.
- SB 360: Comprehensive update to ORS Chapter 65. The proposal has been updated from HB 2609 (2017) to address issues raised by outside stakeholder groups.
- SB 361: Amend the prudent investor rule in the UPIA to clarify that fiduciaries may take into account Environmental, Social, and Governance factors when making investment decisions and developing investment strategies.

ACTION 3.3.2 Adopt a plan for responding to breaking legal news when it offers an opportunity to educate and enhance awareness of issues affecting underserved communities.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Work with bar leaders on a media response policy. COMMUNICATIONS	Complete
2019	Develop and implement the policy. COMMUNICATIONS	Pending; 2020

Year 1 Summary: Communications and media staff will conduct outreach with bar leaders, affinity bars, specialty bars, and external partners to raise awareness and increase opportunities for outreach, including in more rapid-response circumstances. Implementation and revision of the plan will continue throughout 2019.

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Year 2 Summary: Communications and media staff worked with BOG to adopt a Social Media Policy for board members. Work will continue in 2020 to enhance the internal policies and continue to expand presence and visibility on social media platforms.

GOAL 4 Improve the administration of justice to better serve under-represented and marginalized communities.

STRATEGY 1 Support OSB justice system funding priorities.

ACTION 4.1.1 Develop coalitions and collaborate with justice system partners and bar members to achieve OSB legislative priorities.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Meet with justice system partners during the interim to discuss legislative concepts and funding priorities. PUBLIC AFFAIRS	Complete
2019	Host a Day at the Capitol to motivate members and educate legislative leadership. PUBLIC AFFAIRS	Complete
2019	Present information on access to justice to lawyer-legislators and bar members to ensure message consistency. PUBLIC AFFAIRS	Complete

Year 1 Summary: The OSB’s Director of Public Affairs met with legislators and other justice system partners during the interim to discuss legislative concepts and funding priorities.

Year 2 Summary: Same as year one.

STRATEGY 2 Collaborate with the courts and support the Procedural Fairness in Courts Initiative.

ACTION 4.2.1 Develop lunchtime CLE series (Lunch and Learn) at the Capitol for staff and public on implicit bias and procedural justice.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018–2019	Conduct a lunchtime CLE on procedural justice (annually). PUBLIC AFFAIRS.	Ongoing;2020 (2018 and 2019 complete)

Year 1 Summary: CLEs coordinated during the 2018 Legislative Days included content on Procedural Justice, Elder Abuse, and Statutory Interpretation. Planning for the 2019 CLE series is underway.

Year 2 Summary: 2019 CLEs included content on mental health in the workplace, mandatory abuse reporting, and legislative ethics. A CLE on procedural justice CLE is scheduled for 2020.

ACTION 4.2.2 Determine goals of the OSCCIF regarding data identification and collection.

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TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Develop a plan on how to assist best. PUBLIC AFFAIRS	Complete

Year 1 Summary: The OSB’s Director of Public Affairs met with the Criminal Justice Commission regarding justice reinvestment data and coordinated with the OSCCIF regarding report recommendations and proposed changes to the Uniform Trial Court Rules (UTCs).

Year 2 Summary: This item was completed in 2018 when the OSB’s Director of Public Affairs met with the Criminal Justice Commission regarding justice reinvestment data and coordinated with the OSCCIF regarding report recommendations and proposed changes to the Uniform Trial Court Rules (UTCs).

STRATEGY 3 Support access to justice in the legislative arena.

ACTION 4.3.1 Collaborate with other organizations to support procedural fairness and justice system reinvestment.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2019	Host a Day at the Capitol; invite representatives from legal aid, indigent defense services, and coalition partners to participate in events. PUBLIC AFFAIRS	In progress; 2019

Year 1 Summary: This work is planned to take place in 2019. Day at the Capitol is an opportunity for lawyers to meet with their representatives and senators to talk about justice system issues directly related to the bar’s mission. The OSB’s Public Affairs Department arranges meetings for bar members with as many legislators as possible. The day is a chance to discuss the bar’s priorities for the 2019 legislative session.

Year 2 Summary: Meetings with legislative leaders and coalition partners took place throughout 2019, including the Citizens’ Campaign for Court Funding and Day at the Capitol.

ACTION 4.3.2 Develop coalitions to support access-to-justice initiatives.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Meet with coalition partners during the interim to discuss legislative concepts and funding priorities. PUBLIC AFFAIRS	Complete

Year 1 Summary: During the 2018 legislative interim, Public Affairs Department staff regularly met with stakeholders on a variety of topics, including topics related to access to justice and criminal justice reform. This included meetings with legislators, staff, and advocates who sought to update Oregon law to address frequently unintended collateral immigration consequences resulting from convictions of minor offenses.

Year 2 Summary: The Public Affairs Department continued to work with legislative staff on proposed legislation in 2019.

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ACTION 4.3.3 Educate lawyer-legislators, bar members, and coalition partners about the need for legal aid services and indigent defense.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018–2020	Host an access-to-justice event with coalition partners (annually). PUBLIC AFFAIRS	Ongoing; 2020 (2018 and 2019 complete)

Year 1 Summary: Public Affairs Department staff worked with outside groups to facilitate several events focused on access to justice and court funding. In December of 2018, the department hosted a Citizens Campaign for Court Funding breakfast that brought together attorneys representing business groups to advocate for the justice system. During the 2019 session, the Public Affairs Department will host a Day at the Capitol event that will focus largely on funding for legal aid and other justice system priorities.

Year 2 Summary: In 2019, the Public Affairs Department facilitated several Citizens' Campaign for Court funding events, including four breakfasts with the Chief Justice. These events included outreach to business and nonprofit groups, as well as events in Bend, Lane, Multnomah, and Jackson counties. Additionally, the department hosted a Day at the Capitol event that focused largely on funding for legal aid, indigent defense, and the courts.

ACTION 4.3.4 Pursue consumer protection initiatives

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Pursue consumer protection initiatives related to the Futures Task Force Report (www.osbar.org/docs/resources/taskforces/futures/FuturesTF_Summary.pdf) PUBLIC AFFAIRS	Complete
2019	Achieve progress in consumer protection initiatives in the 2019 legislative session. PUBLIC AFFAIRS	Pending; 2019

Year 1 Summary: HB 4095 (lawyer referral service attorney-client privilege legislation) and HB 4097 (law library resources bill) were passed in 2018.

Year 2 Summary: SB 358 was passed in 2019, addressing several consumer protection issues related to bar governance.

ACTION 4.3.5 Improve resources for self-navigators.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018–2019	Support court initiatives of the Futures Task Force. PUBLIC AFFAIRS	Complete
2019	Hold a successful legislative session. PUBLIC AFFAIRS	Complete

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Year 1 Summary: This action item, originally under the ownership of General Counsel, has been reassigned to the Public Affairs Department. Implementation is pending.

Year 2 Summary: In 2019, the Public Affairs Department continued to work with courts on funding for additional resources for self-navigators as part of the overall judicial budget.

ACTION 4.3.6 Use the CLNS to update legislators about the unmet legal needs of low-income Oregonians to support increased legal aid funding.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Establish a diverse network of leaders, including leaders from nondominant cultures, to support relevant issues and trends. PUBLIC AFFAIRS	Complete
2019	Hold a successful legislative session. PUBLIC AFFAIRS	Complete

Year 1 Summary: Throughout the 2019 session, the Public Affairs Department will work with other advocates for legal services, such as the Campaign for Court Funding, to advocate for increased funding for legal aid. The bar has already introduced one piece of legislation to this end and will be meeting with key legislators throughout session to discuss this issue. Legal Aid funding will also be a key focus at the OSB Day at the Capitol event in May 2019.

Year 2 Summary: Worked throughout the legislative session to educate legislators about unmet legal needs, and to encourage additional legal aid funding. Additional funding was added in the final OJD budget.

BAR OPERATIONS SPHERE

GOAL 1 Bar employees have a high level of diversity and inclusion competence and ownership.

STRATEGY 1 Provide educational opportunities for OSB employees.

ACTION 1.1.1 Provide one annual mandatory session focused on inclusion, equity, or cultural competence for all staff.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018–2020	Identify topic and schedule presenter (annually). HUMAN RESOURCES	Ongoing; 2020 (2018 complete)

Year 1 Summary: The 2018 mandatory session was on The Science of Implicit Bias, delivered by the Director of the National Diversity Council. Staff attendance was around 85 percent; staff who did not attend are being scheduled to view a recording of the presentation. Staff was surveyed for feedback on the presentation, and that information will be evaluated. Input from staff on the 2019 topic will be requested.

Year 2 Summary: In June 2019, staff were surveyed for DEI training topics. A presenter was contacted, and preliminary work began. The estimated fee was beyond budgetary resources, and this project was therefore put on hold for 2019. However, conversations are being held that may lead to the project resuming for a 2020 training.

ACTION 1.1.2 Provide one annual mandatory session focused on diversity, inclusion, equity, or cultural competence for managers and directors (in addition to the annual all-staff training).

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018–2020	Identify topic and schedule presenter (annually). HUMAN RESOURCES	Pending;2020

Year 1 Summary: The timing of this action is contingent on the results of the pending cultural assessment survey (Bar Operations Sphere 2.1.1), which will inform the subject matter for this training. This action item is postponed accordingly, with implementation expected to begin in 2019.

Year 2 Summary: The cultural assessment survey was postponed. The results of this survey were to inform the training for managers and directors. In the absence of these results, we planned to have the presenters from the staff training (Bar Operations 1.1.1) make a separate presentation to managers and directors; again, due to estimated fees being beyond budgetary resources, the training did not occur.

ACTION 1.1.3 Provide at least one annual cultural awareness day for all employees.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018–2020	Identify culture to highlight; hold activity (annually). D&I	Ongoing; 2019–2020

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Year 1 Summary: After brainstorming potential content and format for this action item, we concluded that this action item provided a good opportunity to develop an employee education session, as opposed to a “cultural awareness” activity, and we adjusted the approach accordingly. We identified transgender and nonbinary inclusivity as a topic that should be addressed with all employees, as a primer for the plan to install gender-neutral restroom facilities (Bar Operations Sphere 2.3.1). The training was conducted in February 2019 by a leader in LGBTQ advocacy and policy work.

Year 2 Summary: The first session was held in early 2019. Another session will be identified and held in 2020.

ACTION 1.1.4 Develop a “tip of the month” feature on the intranet that focuses on information and topics relating to diversity, inclusion, equity, or cultural competence.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018–2020	Source information and post monthly on the intranet. D&I	Ongoing; 2019–2020 (2018 and 2019 complete)

Year 1 Summary: Our “D&I Monthly” intranet feature was introduced in January 2018 and included the following: “Introducing D&I Monthly” (January); Lunar New Year—a brief description of the holiday and its traditions, plus a link to Portland Lunar New Year events (February); the nuances of sign language—video excerpt from a TED Talk by Christine Sun Kim (March); background on and link to the Harvard Implicit Bias Test (April); a history of LGBTQ Pride and the Stonewall uprising (May); the 28th anniversary of the Americans with Disabilities Act (June); OLIO Orientation—video from OLIO alumni about OLIO’s impact (July); video excerpt from *Cracking the Codes* by Shakti Butler, a film about the causes and consequences of systemic inequity, and a reminder that D&I has the full movie for employees to borrow (August); Mental Health Awareness Week and mental health resources (September); short documentary on the challenges faced by trans people serving in the military (October); Oregon’s affinity bars—link to mission statements and where to find information about affinity bars (November); valuing neurodiversity—a video by psychologist Dr. Devon MacEachron (December).

Year 2 Summary: The D&I Monthly intranet feature that was introduced in 2018 continued throughout 2019. The following topics were included: Black History Month and a link to the 2016 documentary *Stay Woke: The Black Lives Matter Movement* (January); LGBT+ terminology resource - as a follow-up to the trans and nonbinary inclusivity training (Bar Operations 1.1.3), (February); Women's History Month and a brief history of Mary Leonard, the first woman to be admitted to practice law in Oregon (March); release of Diversity Action Plan Year One Implementation Report (April); invitation to the D&I Department CLE for diverse lateral attorneys (May); Juneteenth and the commemoration of the freedom of the last remaining enslaved African and African American people in the US (June); invitation to the 2019 OLIO Orientation Judges' Reception (July); support Black-Owned Restaurants Week (August); Hispanic Heritage Month - a brief history and links to Hispanic/Latinx businesses in Oregon (September); a brief history and context around Indigenous People's Day (October); TEDx talk, *I am Not Your Inspiration, Thank You Very Much*, on ableism and the social model of disability by journalist and disability rights advocate Stella Young, plus a link to the City of Portland’s Disability Language Guide (November); OAPABA’s Adopt-A-Family program – sponsorship drive for holiday gifts for families in need (December).

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STRATEGY 2 Ensure managers and directors are held accountable for professional development in relation to diversity, inclusion, equity, and cultural competence.

ACTION 1.2.1 Update managers’ and directors’ performance evaluation templates to ensure that diversity and inclusion ownership and competence are included as leadership attributes to be evaluated.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018–2020	Review templates, change as necessary and implement for the year (annually). HUMAN RESOURCES	Ongoing; 2020 (2018 and 2019 complete)

Year 1 Summary: 2018 performance evaluation templates were updated and distributed to managers and directors.

Year 2 Summary: 2019 performance evaluation templates were updated and distributed to managers and directors.

ACTION 1.2.2 Encourage managers and directors to identify and participate in external educational opportunities that focus on professional development around diversity and inclusion.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018–2020	Discuss diversity and inclusion in professional development during performance evaluation (annually). CEO	Ongoing; 2019–2020 (2018 complete)

Year 1 Summary: A demonstrated commitment to and support of diversity and inclusion are attributes of leadership and professionalism outlined in the director performance evaluations. These items were highlighted in the written evaluations conducted in 2018. In addition, during regular meetings with individual reports throughout the year, the CEO discussed equity and inclusion learning opportunities, both in moments of everyday life and through professional trainings.

Year 2 Summary: The CEO continues to discuss with her direct reports throughout the year, equity, and inclusion learning opportunities, both in moments of everyday life and through professional trainings. All direct reports attended at least one of the three BOG DEI trainings conducted during 2019, and several attended more than one.

STRATEGY 3 Review current OSB language used in relation to diversity and inclusion and make updates according to current best practices.

ACTION 1.3.1 Research best practices around diversity and inclusion language.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Collate findings into a best-practices report. D&I	In progress; 2020

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Year 1 Summary: Initial work has begun and will continue into 2019. Input from stakeholders will be solicited.

Year 2 Summary: We plan to complete this item in 2020.

ACTION 1.3.2 Conduct an assessment of OSB language, including pronouns, used on all internal and external materials.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Identify language and all language locations for updating, using the best-practices report. D&I	In progress; 2020
2019	Develop a language update implementation plan. D&I	Pending; 2020
2019	Implement consistent language updates per the implementation plan. D&I	Pending; 2020

Year 1 Summary: Initial work has begun and will continue into 2019. A first draft of recommendations to update the demographic categories used by the OSB was developed; further work will continue in collaboration with a leader in LGBTQ advocacy and policy and other stakeholders.

Year 2 Summary: This work will continue into 2020.

ACTION 1.3.3 Update OSB staff regarding changes to best-practices terminology and language.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2019	Include best-practices language updates within the annual staff education session. HUMAN RESOURCES	Pending; 2020

Year 1 Summary: Implementation is on schedule for 2019.

Year 2 Summary: The D&I Department will share their languages best practices report and implementation plan in 2020 (Bar Operations 1.3.2). Training on best practices language was to be included in the training provided to staff in 2019. Presenters for what will now be 2020 training are aware this should be included in the training.

STRATEGY 4 Ensure the OSB bylaws are consistent with the OSB and DAC mission and goals around diversity and inclusion.

ACTION 1.4.1 Review bylaws and identify bylaws that need to be amended.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2019	Identify bylaws. GENERAL COUNSEL	In progress; 2019
2020	Draft and present amendments to the BOG for approval. GENERAL COUNSEL	Pending; 2020

Year 1 Summary: General Counsel has completed an initial review of OSB bylaws to present to the BOG for further consideration.

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Year 2 Summary: General Counsel continues to review OSB bylaws to present to the BOG for further consideration.

GOAL 2 Foster a welcoming and inclusive workplace and accessible programs, services, and Bar Center.

STRATEGY 1 Acquire an understanding of the bar’s workplace culture.

ACTION 2.1.1 Devise and conduct a workplace culture assessment.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Conduct a workplace culture assessment and analyze data. HUMAN RESOURCES	In progress; 2019.

Year 1 Summary: We found that previously engaged consultants in 2018 provided disappointing survey drafts. In an effort to get the most useful results, it was decided to take a step back and start over. We are in the process of reviewing RFPs, utilizing the D&I Department’s recommendations following their search for a consultant on other projects. Work will continue into 2019.

Year 2 Summary: The cultural assessment survey was postponed after work was halted with the initial consultants. After an RFP process led by DI, a consultant was hired to survey the membership. DI suggested this consultant be used for the internal cultural assessment survey and after the membership survey was complete. Additionally, needed budgetary resources exceeded the 2019 budget. The 2020 budget includes funds for this project. The consultants will be contacted.

ACTION 2.1.2 Evaluate employees’ reasons for leaving the organization.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Review exit interview process and implement changes. HUMAN RESOURCES	Pending; 2020
2019	Develop a method for reviewing and analyzing data. HUMAN RESOURCES	Complete
2020	Analyze and evaluate current and historic data. HUMAN RESOURCES	2020

Year 1 Summary: Work on this action item has not yet started.

Year 2 Summary: Exit interview data for 2015-2019 was collected, and methods for reviewing the data was created.

ACTION 2.1.3 Conduct an internal salary equity assessment.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2019	Conduct an assessment by a third-party contractor and analyze data. HUMAN RESOURCES	Ongoing; 2020 (2019 complete)

Year 1 Summary: This project is conducted by Human Resources at the direction of the OSB’s General Counsel.

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Year 2 Summary: As part of Oregon's Pay Equity Act, and evaluation of all salaries was conducted in 2019. This assessment will be executed each year to ensure salaries are equitable.

STRATEGY 2 Use the results of data collection to identify areas for improvement.

ACTION 2.2.1 Develop a plan to address areas that need improvement.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2020	Develop and implement the plan. HUMAN RESOURCES	Pending; 2020

Year 1 Summary: Implementation is on schedule for 2020.

Year 2 Summary: Implementation is on schedule for 2020.

STRATEGY 3 Identify and resolve barriers to the OSB being a welcoming environment for all.

ACTION 2.3.1 Develop and implement a plan to ensure inclusive restroom access for all employees and visitors.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Develop the plan and identify needed resources. D&I	Complete
2019	Implement the plan. FINANCE AND OPERATIONS	Pending; 2020

Year 1 Summary: We are in the process of quoting the cost to convert an area on the first floor into a single-use bathroom. Cost will determine if the construction portion of this project can be executed within the 2019 budget or if it will need to be deferred until 2020. Education as part of this plan took place in February 2019 (see Bar Operations Sphere 1.1.3).

Year 2 Summary: The bar has committed, with BOG approval, to construct a gender-neutral, single-use restroom on the first floor and will place signage throughout the building calling out its location on the first floor. Construction is currently scheduled to begin and be completed in January 2020.

ACTION 2.3.2 Develop and implement a policy and procedure to create an inclusive environment for nonbinary and transgender employees.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2019	Develop a plan and identify needed resources. HUMAN RESOURCES	Pending; 2020
2020	Implement the plan. HUMAN RESOURCES	Pending; 2020

Year 1 Summary: On track for 2019 implementation.

Year 2 Summary: A plan was developed in 2016 and placed on hold. In 2019, there was no additional work done on this item, pending for 2020.

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STRATEGY 4 Continue to identify and resolve barriers to accessibility for persons with disabilities to OSB programs, services, and Bar Center.

ACTION 2.4.1 Develop and implement a plan to identify and resolve barriers to OSB Center facility.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Review building user feedback to identify ways to improve building accessibility. GENERAL COUNSEL	In progress; 2020
2019	Create a plan and identify needed resources to improve building accessibility. GENERAL COUNSEL	In progress; 2020
2020	Implement the accessibility plan. GENERAL COUNSEL	Pending; 2020

Year 1 Summary: A survey of members with disabilities taken in 2016 showed about 15 percent of respondents had feedback regarding access to the OSB Center. The comments did not identify any physical barriers with particularity. The BART has identified a list of discretionary capital improvement projects to improve building accessibility, with a priority list, and has submitted it to the OSB's CFO for use in the budgeting process.

Year 2 Summary: In 2019, BART increased the frequency of its meetings. The bar is focusing on improving the accessibility of the bar's website for users with visual disabilities. The BOG also approved the creation of a gender-neutral, all-user accessible bathroom on the first floor in January 2020.

For follow-up: Refinance ADA survey.

ACTION 2.4.2 Ensure OSB websites are compatible with screen readers.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Create a plan to continue identifying and updating portions of the website that are not accessible to persons utilizing screen readers. IT	Complete
2019	Implement the website accessibility plan. IT	Ongoing; 2019–2020

Year 1 Summary: The current website is fully updated except for PDF downloads (see Public Outreach Sphere 3.1.4). An ongoing process is in place for tracking and resolving the remaining problems as they arise while the website is rewritten. The Information Technology Department is assuming responsibility for this action item, which was previously assigned to General Counsel.

Year 2 Summary: We continue to update webpages and documents and ensure we respond as quickly as possible. Compatibility with screen readers is an ongoing priority. As previously discussed, the cost is the biggest hurdle for the prioritization and success of the overall quality of the OSB website.

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ACTION 2.4.3 Continue to educate bar staff and bar leaders about accessibility.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Gather feedback and identify areas where bar staff and bar leaders may require additional assistance or education on accessibility issues. GENERAL COUNSEL	In progress; 2020
2019	Hold bar staff training on accessibility. GENERAL COUNSEL	Pending; 2020
2019	Develop accessibility guides and recommendations that respond to bar staff and bar leaders' needs. GENERAL COUNSEL	Pending; 2020
2020	Distribute accessibility guidelines and recommendations to bar staff and bar leaders. GENERAL COUNSEL	Pending; 2020

Year 1 Summary: The primary efforts here for this work have been in outreach to OSB sections. Section websites are mostly compliant at this point, and all of their CLE activities are transferring to our CLE Seminars Department in 2019, a step that will facilitate improved oversight and consistency in respect to the way reasonable accommodations requests and prioritizing accessibility for events are handled. Work on this action item will continue into 2019.

Year 2 Summary: The D&I Department circulated a list of accessibility-related preferred terminology through the intranet for bar staff. The Member Services group has continued to work with Sections to improve accessibility of section events.

GOAL 3 Build a workforce that is diverse and inclusive at every level.

STRATEGY 1 Collect demographic data as one benchmark for measuring the diversity of applicants and the workforce.

ACTION 3.1.1 Evaluate the categories currently used by the OSB for measuring staff diversity.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Assess categories and expand as necessary. HUMAN RESOURCES	Complete
2019	Implement revised data collection. HUMAN RESOURCES	Complete
2020	Develop and implement a system for ongoing review and analysis of data. HUMAN RESOURCES	Complete

Year 1 Summary: The first month of analysis using the new categories was August 2018. The D&I Department will be providing updated categories for gender identity once their work on this item is complete, expected in 2019 (Bar Operations Sphere 1.3.2).

Year 2 Summary: The data is collected on a monthly basis, with reports created and shared with the CEO. An annual review is presented in the department's program measures.

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ACTION 3.1.2 Investigate options for assessing the diversity of applicants.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2019	Evaluate electronic application systems. HUMAN RESOURCES	Pending; 2020
2020	Update application process. HUMAN RESOURCES	Pending; 2020

Year 1 Summary: On track for 2019–2020 implementation, per the target dates.

Year 2 Summary: Due to budgetary constraints, this project is postponed until 2020.

STRATEGY 2 Ensure that the OSB recruitment process is inclusive and equitable.

ACTION 3.2.1 Assess the current OSB recruitment process.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Develop a method for assessment. D&I	In progress; 2020
2019	Conduct the assessment and analyze data. D&I	Pending; 2020

Year 1 Summary: The D&I Department is continuing to work with the Human Resources (HR) Department on assessing best practices for recruitment. It is not expected that there will be a delay in the assessment and data analysis target measure.

Year 2 Summary: This action is pending for 2020.

ACTION 3.2.2 Identify areas for improvement and develop a plan for improvement.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2019	Develop a plan. HUMAN RESOURCES	Pending; 2020
2020	Implement the plan. HUMAN RESOURCES	Pending; 2020

Year 1 Summary: On track, per target dates.

Year 2 Summary: This project is contingent on the workplace culture assessment (Bar Operations Sphere 2.1.1), and is therefore on hold until the assessment results are available.

STRATEGY 3 Increase the diversity of applicants for vacant positions at the OSB.

ACTION 3.3.1 Build relationships with external groups and organizations that are focused on diversity.

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TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Identify external groups and organizations. D&I	Pending; 2020
2018	Develop a plan for building relationships with identified organizations that is appropriate to each organization. D&I	Pending; 2020
2019	Implement the plan. D&I	Pending; 2020

Year 1 Summary: Work to identify external groups and organizations will proceed in 2019.

Year 2 Summary: This action is pending for 2020.

ACTION 3.3.2 Expand outreach to a more diverse pool of potential applicants.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Evaluate current outreach for job openings to identify gaps. HUMAN RESOURCES	Complete
2019	Identify potential resources for additional outreach and their job posting requirements and needs. HUMAN RESOURCES	Complete
2019	Incorporate new resources into current advertising plans. HUMAN RESOURCES	Complete

Year 1 Summary: Through a variety of resources, the HR Department’s advertising plan was updated with additional job advertising partners. Resources included the D&I Department, colleagues, current advertising partners, and research. As a result, the advertising plan was updated, and job announcement advertising was expanded. Though these target measures are complete, applicant outreach will be reviewed on an ongoing basis.

Year 2 Summary: The evaluation of resources is ongoing, with new or out-of-date information added or removed as necessary.

STRATEGY 4 Explore and use bias interrupters in the hiring process.

ACTION 3.4.1 Incorporate hiring committees into the hiring process.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Identify opportunities for the use of hiring committees. HUMAN RESOURCES	Complete
2018	Investigate and experiment with alternative hiring models that incorporate hiring committees. HUMAN RESOURCES	Complete
2019	Develop training for hiring committee participants. HUMAN RESOURCES	Complete
2019	Identify staff interested in participating in hiring committees and provide training. HUMAN RESOURCES	Pending; 2020

Year 1 Summary: Hiring committees were used for four open positions in 2018. The process is being refined and altered after each hire to be efficient and effective.

Year 2 Summary: Hiring committees were used for eight positions filled in 2019. With each use, more is learned, and adjustments are made to improve the system. At the beginning of each committee, training

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is held to review the process and how the different steps help to reduce bias in the hiring process. A pool of interested participants has not yet been developed.

ACTION 3.4.2 Create accountability for hiring process decisions.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Implement a step within the hiring process that requires decision-makers to state a reason why they did not choose to take applicants to the next stage. HUMAN RESOURCES	Complete
2018	Provide training for managers and directors on bias interrupters. HUMAN RESOURCES	Pending; 2019

Year 1 Summary: Hiring committee members for recruitment in 2018 were required to state a reason why they chose not to take each applicant to the next stage. A template was created and attached to each resume, to be completed by each committee member. Committee members were also required to indicate on each template their decision and why it was made, and to complete, as much as possible, the checklist of job requirements.

Bias interrupter training will be scheduled after the cultural assessment survey (Bar Operations Sphere 2.1.1) is complete.

Year 2 Summary: Bias interrupter training was to be the focus of training provided by the consultants. Reduced fees are being negotiated for a 2020 training.

GOAL 4 Engage a diverse and inclusive group of contractors, suppliers, vendors, and consultants.

STRATEGY 1 Develop and implement a process for ensuring consideration of a diverse list of third-party vendors.

ACTION 4.1.1 Review the current processes used organization-wide for selecting contractors, suppliers, vendors, and consultants.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2018	Review and document the process. FINANCE AND OPERATIONS	Complete

Year 1 Summary: A process, including a template for RFPs and a decision matrix that includes price; time to completion; quality; and Office of Minority, Women and Emerging Small Business (OMWESB) registration (or similar) as factors was created, and went live in October 2018. See also Bar Operations Sphere 4.1.2.

ACTION 4.1.2 Create and implement a policy or policies for contracting with third-party vendors that account for the various needs of the organization and consider a diverse vendor pool.

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TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2019	Develop a policy. FINANCE AND OPERATIONS	Complete
2020	Implement the policy. FINANCE AND OPERATIONS	Complete
2020	Continue to operate per the purchasing quotation procedure, and report 2020 quotation activity.	Ongoing; 2020

Year 1 Summary: Data on supplier diversity is not currently collected; however, a draft policy involving voluntary vendor self-identification is in place, which will allow us to draw on this data going forward.

A procedure that encourages consideration of a diverse vendor pool went live in October 2018.

Year 2 Summary: Per the procedure implemented in 2018, the bar identified seven projects that were quoted utilizing the standard quotation form, requesting voluntary diversity disclosure data. The total value of goods and services quoted through November 30, 2019, using this process is \$281,500.

ACTION 4.1.3 Review annual diversity spending before the next year budget is finalized.

TARGET DATE	TARGET MEASURE	STATUS & NEW TARGET DATE
2019	Hold a review meeting with the CEO, General Counsel, the Director of Finance and Operations, and the Director of Diversity & Inclusion. FINANCE AND OPERATIONS	In progress; 2019

Year 1 Summary: N/A. This was a new item.

Year 2 Summary: A review meeting was held in December of 2019 with the CEO, GC, CFO, and Director of D&I. The group affirmed the continued practice of using the RFQ forms with voluntary diversity disclosures. To date (between enactment in A4 2018 through December of 2019), eight projects had been submitted for a quote with a total dollar value in excess of \$200K.

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GLOSSARY

ACRONYMS

ABA	American Bar Association
ACLU	American Civil Liberties Union
AILA	American Immigration Lawyers Association
BART	Bar Accessibility Review Team
BOG	Board of Governors (Oregon State Bar)
CAO	Client Assistance Office (Oregon State Bar)
CEJ	Campaign for Equal Justice
CLNS	Civil Legal Needs Study
DAC	Diversity Advisory Council
D&I	Diversity & Inclusion
DCO	Disciplinary Counsel's Office (Oregon State Bar)
GOSW	Grantmakers of Oregon and Southwest Washington
HOD	House of Delegates (Oregon State Bar)
IOLTA	Interest on Lawyer Trust Accounts
LRS	Lawyer Referral Services (Oregon State Bar)
LSP	Legal Services Program (Oregon State Bar)
MBA	Multnomah Bar Association
MBF	Multnomah Bar Foundation
MCLE	Minimum Continuing Legal Education
NLMP	New Lawyer Mentoring Program
OAAP	Oregon Attorney Assistance Program
OAPABA	Oregon Asian Pacific American Bar Association
OCLA	Oregon Chinese Lawyers Association
OCLEAB	Oregon Council on Legal Education and Admissions to the Bar
OC-NBA	Oregon Chapter of the National Bar Association
OFALA	Oregon Filipino American Lawyers Association
OGALLA	The LGBT Bar Association of Oregon
OHBA	Oregon Hispanic Bar Association
OLIO	Opportunities for Law in Oregon (Oregon State Bar)
OMLA	Oregon Minority Lawyers Association
OMWESB	Office of Minority, Women and Emerging Small Business
ONLD	Oregon New Lawyers Division (Oregon State Bar)
OSB	Oregon State Bar
OSCCIF	Oregon Supreme Court Council on Inclusion and Fairness
OWLS	Oregon Women Lawyers
RIS	Referral and Information Services (Oregon State Bar)
UCTRs	Uniform Trial Court Rules
YLS	Young Lawyers Section (MBA)

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2019 Volunteer Recruitment and Appointment Data

2019 Volunteers		
Applicants	225	
Appointed	71	32%

Volunteers by Race & Ethnicity					
	Total volunteers	Members appointed	Appointed %	Leadership membership*	OSB membership
American Indian or Alaska Native	-	-	-	1%	0.5%
Asian or Pacific Islander	9	3	33%	7%	3%
Black or African American	7	3	43%	2%	1%
Hispanic or Latino	5	3	60%	6%	2%
Self-Identified	3	2	67%	2%	3%
White or Caucasian	156	52	33%	66%	63%
Declined to state	48	8	17%	16%	29%
Total	225	71			

Volunteers by Sexual Orientation					
	Total volunteers	Members appointed	Appointed %	Leadership membership*	OSB membership
Heterosexual	129	44	34%	66%	49%
Lesbian, Gay, Bisexual	10	5	50%	5%	2.7%
Self-Identification	-	-	-	-	.2%
Declined to state	86	22	26%	30%	49%
Total	225	71			

Volunteers by Gender Identity					
	Total volunteers	Members appointed	Appointed %	Leadership membership*	OSB membership
Male	63	22	35%	34%	32%
Female	91	31	34%	41%	24%
Transgender	-	-	-	-	.1%
Declined to State	71	18	25%	17%	45%

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Total	225	71			
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Volunteers by Disability Status					
	Total volunteers	Members appointed	Appointed %	Leadership membership*	OSB membership
Yes	6	2	33%	3%	1.4%
No	144	50	35%	70%	53%
Declined to State	75	19	25%	28%	45%
Total	225	71			

Volunteers by Years of Practice					
	Total volunteers	Members appointed	Appointed %	Leadership membership*	OSB membership
5 years or less	64	19	17%	17%	18%
6-15 years	77	24	31%	34%	32%
16-25 years	40	12	30%	22%	21%
26-35 years	24	10	42%	17%	15%
36+ years	20	6	30%	10%	14%
Total	225	71			

Public v. Private				
	Total volunteers	Members appointed	Appointed %	Leadership membership*
Public	51	23	45%	32%
Private	174	48	28%	67%