

Oregon State Bar Program Review Policy
Revised February 7, 2020

I. Purpose. The purpose of this policy is to implement the Board's obligations to ensure that the limited resources of the Oregon State Bar are effectively used to support the Bar's mission and strategic goals.

II. Policy

A. All current programs, services and activities (PSA) of the Oregon State Bar shall undergo a review at least once every three years, or more frequently as appropriate, using the process and criteria outlined below.

B. All proposed new PSAs shall undergo the same review process before being approved by the Board of Governors (BOG), and shall be reviewed after the first year of the new program before being recommended for continuation to the BOG.

C. Scores are for informational purposes only and do not bind the BOG with respect to the particular program.

D. The Policy and Governance Committee (PGC) will be responsible for the review.

III. Process

A. Once every three years, staff shall provide to the PGC at the beginning of the year, the following information regarding all current PSAs of the Oregon State Bar:

1. Brief description of the existing PSA and how it supports the OSB statutory charge, mission, functions and goals.
2. Most recent annual budget for the PSA, including % of OSB overall operating budget;
3. Most recent program measures and program evaluation for the PSA;
4. Where applicable
 - a. Number or % of bar members served or impacted on an annual basis,
 - b. Number or % of bar members, and number of members of the public, from non-dominant cultures served or impacted on an annual basis, and
 - c. Number of members of the public served or be impacted on an annual basis;
5. Number of volunteers engaged in the PSA, number of hours of volunteer service and value of volunteer engagement;
6. Description of and comparison with competing internal and external PSAs, if any.

B. Upon review of the information provided, the PGC shall determine which PSA or PSAs to review in depth, considering the following factors:

1. BOG strategies and areas of focus for the year.
2. How recently an in-depth review was conducted for the PSA.
3. Resources available to conduct the review.
4. Whether the PSA is new. (See II.B.)

C. The PGC shall determine the information needed to conduct the in-depth review and develop a proposed action plan and schedule for completion of the review. In conducting its in-depth review, the PGC shall use the evaluation and scoring criteria set forth below as a foundation for its analysis.

IV. Evaluation and Scoring Criteria

A. Description of Existing/New Program, Service, Activity (PSA).

B. Member Impact. Number or % of bar members served or impacted on an annual basis; for new PSA include basis for projection; rate on a scale of 1 [low impact] to 3 [high impact].

C. Impact on Individuals from Non-Dominant Cultures. Number or % of bar members from non-dominant cultures served or impacted; number of members of the public from non-dominant cultures served or impacted on an annual basis; for new PSA include basis for projection; rate on a scale of 1 [low impact] to 3 [high impact].

D. Public Impact. Number of members of the public served or impacted on an annual basis; for new PSA include basis for projection; rate on a scale of 1 [low impact] to 3 [high impact].

E. Competition. Competing PSAs; describe and compare with OSB and outside entity parallel PSAs; rate on a scale of 1 [high competition] to 3 [low competition].

F. Volunteer Engagement. Number of volunteers engaged in the PSA; number of hours of volunteer service, and; value of volunteer engagement. Rate on a scale of 1 [low volunteer engagement] to 3 [high volunteer engagement].

G. Annual Cost/Revenue of PSA. Rate on a scale of 1 [net cost] to 2 [net neutral] to 3 [net revenue].

1. Direct Cost
2. Indirect Cost (includes personnel and related overhead expenses)
3. Capital Cost (if applicable)
4. Revenue Generated (if applicable)
5. Net

H. Percentage of Operating Budget. Rate on a scale of 1 [high percentage of budget] to 3 [low percentage of budget].

I. Alignment with Statutory Functions and Mission.

The Oregon State Bar (OSB) is a public corporation and an instrumentality of the Judicial Department of the State of Oregon. The OSB Board of Governors (BOG) governs the state bar and must “at all times direct its power to serve the public interest by:

- (a) Regulating the legal profession and improving the quality of legal services;
- (b) Supporting the judiciary and improving the administration of justice; and
- (c) Advancing a fair, inclusive and accessible justice system.”

As a unified bar, the OSB may use mandatory member fees only for activities that are germane to the purposes for which the bar was established.

The mission of the Oregon State Bar is to serve justice and the public interest by promoting respect for the rule of law, by improving the quality of legal services, and by increasing access to justice.

Rate each factor on a scale of 1 [low alignment] to 3 [high alignment]:

1. Ensure competence in the legal profession.
2. Ensure integrity in the legal profession.
3. Promote professionalism in the legal profession.
4. Support the judicial system. This includes ensuring that courts are adequately funded, impartial and have structural integrity. This also includes maintaining the Bar Act and rules pertaining to regulation of the legal profession.
5. Improve the administration of justice. This includes ensuring that laws and court rules are fair, efficient, and effective.
6. Promote the quality and integrity of the judiciary.
7. Advance diversity, equity and inclusion within the legal community and the provision of legal services.
8. Foster public understanding of the law and justice system.
9. Increase access to justice.

IV. PSA Review Matrix. The attached matrix shall be used to capture the evaluations of existing and proposed PSA's and shall be included as an attachment to a board reporting form for presentation to the Board of Governors to validate existing and approve proposed PSAs.

OSB Program/Service/Activity Scoresheet

Program/Service/Activity		
Description		
Considerations	Data	Score
Public Impact		
Impact on individuals from non-dominant cultures		
Member Impact		
Competition		
Volunteer Engagement		
Revenue/ Cost		
Percentage of Budget		
Total		

Mission Alignment		
Strategic Goals	Comments	Score
Ensure competence in the legal profession		
Ensure integrity in the legal profession		
Promote professionalism in the legal system		
Support judicial system		
Improve administration of justice		
Promote the quality and integrity of the judiciary		
Advance DEI in the bench and bar		
Foster public understanding of the law and justice system		
Increase access to justice		
Total		
Average		

Combined Total (Factors + Mission Alignment Average) _____