

Certified Pro Bono Program Application

Oregon Pro Bono programs may become certified through a process authorized by the Oregon State Bar under the Board of Governors' Policies on Pro Bono contained in [OSB Policy 12.101](#). Programs that meet the certification requirements are eligible to receive free PLF coverage for PLF-exempt attorney volunteers.

To be eligible for certification, a pro bono program must:

- Be sponsored by a national, state or local bar association, a court with jurisdiction in Oregon or an incorporated, non-profit or governmental organization, and provide legal services without fee, or expectation of fee, or for a substantially reduced fee to one or more of the following:
 - 1) Persons of limited means,
 - 2) Underserved populations with special legal needs, or
 - 3) Charitable, religious, civic, community, governmental and educational organizations in matters which are designed primarily to address the needs of persons of limited means or underserved populations with special legal needs.
- Not provide any compensation to the participating lawyers, except to cover filing fees or other out-of-pocket expenses or to provide professional liability insurance for the pro bono activity.
- Deliver legal services to clients at no fee or for a substantially reduced fee. Nominal administrative fees are allowed. Donations from clients, whether encouraged or not, are not considered fees. The pro bono program should prohibit or limit the handling of cases that are clearly fee generating, and provide for the referral of such cases.
- Demonstrate that it has the necessary expertise and quality control to administer a program involving volunteer lawyers. This should include appropriate matching of pro bono lawyers to cases, an effective grievance procedure and adequate tracking and record keeping systems regarding pro bono involvement.
- Comply with Article 10 of the Bar's Bylaws (Diversity), both in regard to participating lawyers and clients.

The Executive Director of the Oregon State Bar, in consultation with the Professional Liability Fund, determines if a program is eligible for certification.

Return the completed application to:

Pro Bono Program
Oregon State Bar
P.O. Box 231935
Tigard, Oregon 97281-1935
probono@osbar.org

Direct questions about certified programs to:

503-431-6344
800-452-8260, ext. 344
probono@osbar.org

Direct questions about PLF coverage to:

Emilee Preble
503-639-6911
800-452-1639

Sponsor

Sponsor Name			
Mailing Address	City	State	Zip
Website	Office Phone		
Board Chair or Equivalent	EIN		
Sponsor is <input type="checkbox"/> Bar Association <input type="checkbox"/> Court <input type="checkbox"/> Incorporated Non-profit Organization <input type="checkbox"/> Governmental Agency			

If incorporated nonprofit, attach your IRS Letter & Articles of Incorporation.

Otherwise, attach documentation of authorization of the project.

Does the sponsor have a political purpose? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, explain:

Authorized Agent for Service of Process			
Authorized Agent Address	City	State	Zip

Indicate the current number of paid staff in each category including part-time staff _____ Attorneys who provide direct legal services to clients _____ Paralegals and Legal Assistants who work directly with clients for intake, etc. _____ Law Clerks _____ Management _____ Clerical / accounting / reception / other personnel _____ Total paid staff
If the sponsor provides legal services outside of pro bono projects, describe the services provided, the client base, and funding sources. You may answer this question by attaching materials made for other purposes like an Annual Report.

Pro Bono Program If you have multiple programs, please include multiple program sections

Pro Bono Program Name (if any)		Pro Bono Program Start Date
Pro Bono Program Contact	Title	
Email	Phone	
What is this pro bono program's geographic reach? <input type="checkbox"/> Statewide <input type="checkbox"/> Specific Counties (list):		

Are you requesting free PLF coverage for PLF-exempt attorneys who participate in this project? <input type="checkbox"/> Yes <input type="checkbox"/> No
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Purpose

What are this pro bono program's purpose and structure including legal services provided and client base? You may answer this question by attaching bylaws or other documentation showing how the program is structured.
What fee does this Pro Bono Program charge clients for legal services? (check all that apply) <input type="checkbox"/> No fee or expectation of fee (except for filing fees or other out-of-pocket expenses) <input type="checkbox"/> Nominal administrative fee <input type="checkbox"/> Substantially reduced fee <input type="checkbox"/> Full market-rate fees (full-fee programs do <i>not</i> meet the Certified Program requirements)
How does this Pro Bono Program handle cases that are clearly fee-generating, that is cases clearly likely to result in a fee for legal services from an award to a client, from public funds, or from the opposing party? <input type="checkbox"/> The kinds of cases taken are not fee-generating <input type="checkbox"/> Prohibits taking clearly fee-generating cases <input type="checkbox"/> Limits taking clearly fee-generating cases, explain how limits are applied:

Clients

What kinds of clients does this pro bono program serve? (check all that apply)

- ☐ Persons of limited means
- ☐ Underserved populations with special legal needs
- ☐ Charitable, religious, civic, community, governmental, and educational organizations in matters that are designed primarily to address the needs of persons of limited means or underserved populations with special legal needs

Does this pro bono program have a policy of nondiscrimination regarding clients?

☐ Yes ☐ No

What are the criteria for accepting clients into this pro bono program?

How does this pro bono program perform client intake?

Volunteers

Is this pro bono program open to all members of the Oregon State Bar in compliance with the OSB Bylaw Article 10 Diversity Policy?

☐ Yes ☐ No

Does this pro bono program prohibit compensating volunteer attorneys beyond reimbursement for filing fees or other out-of-pocket expenses?

☐ Yes ☐ No

How does this pro bono program use volunteer attorneys?

How does this pro bono program determine volunteer attorneys are in good standing with the Oregon State Bar?

Beyond good standing with the bar, what are this pro bono program's requirements, if any, for volunteer attorneys?

How does this pro bono program assure that volunteer attorneys are appropriately knowledgeable of the legal area the program is addressing?

How does this pro bono program track time spent by volunteer attorneys on pro bono cases? The OSB and PLF require Certified Programs to annually report the pro bono hours of volunteer attorneys.

Quality Control

What mechanism does this pro bono program use to match cases to volunteer attorneys?

How does this pro bono program track cases referred to volunteer attorneys and assure that volunteers diligently attended to cases?

How does this program handle client complaints and grievances? You may answer this question by attaching the program's written grievance policy.

What other steps does this pro bono program take to assure that clients receive the highest quality of service?

Professional Liability Insurance

Have professional liability claims been made by clients against the sponsor or pro bono program in the past five years?

☐ Yes ☐ No

- ❖ If Yes, for each claim not previously reported to the PLF, provide
- Name of claimant and name of attorney involved
 - Nature of claim, and whether malpractice claim went into litigation
 - Size of claim
 - Cost of defending claim
 - Indemnity (damages) paid on the claim
 - Whether the claim was covered by malpractice insurance
 - Whether responsible attorney was a staff attorney or volunteer
 - Any relevant special factors (including any changes or improvements made to your program's procedures)

Indicate your best estimate of the following for the upcoming year

_____ Number of volunteer attorneys this pro bono program will host

_____ Percent of volunteers in private practice carrying their own PLF coverage

_____ Percent of volunteers *not* carrying their own PLF coverage

What kinds of professional liability insurance, if any, does the host maintain?

☐ Coverage from the Professional Liability Fund

☐ Coverage from another provider: _____

☐ No coverage

- ❖ If the host has professional liability coverage from a provider other than the PLF, enclose a copy of the current malpractice policy, including declarations or cover sheet and all endorsements.

Applications seeking PLF Pro Bono Coverage will be forwarded to the PLF for underwriting. Once approved, the PLF will issue a special Pro Bono Claims Made Plan to cover all PLF-exempt lawyers who volunteer for your program. PLF Pro Bono coverage is underwritten and issued on an annual, calendar year basis.