

## Lawyer Referral Service General Information

Oregon State Bar, Lawyer Referral Service, PO Box 231935, Tigard, OR 97281-1935  
Voice: (503) 431-6408 or (800) 452-8260 ext. 408 Fax: (503) 598-6946

Thank you very much for your interest in the Lawyer Referral Service! We look forward to providing you and your future clients with extraordinary service, delivered with the utmost respect and professionalism. Please do not hesitate to contact us if we can be of further assistance and answer any questions you may have.

### Policies and Procedures

All attorneys participating in the Lawyer Referral Service (LRS) program must agree to abide by the Lawyer Referral Service Policies and Procedures that follow this information sheet.

### Program Notes

The LRS operates on a 12-month program year, beginning July 1 and ending June 30. Although registrations are accepted at any time, fees are not prorated for late registrants.

Participating attorneys agree to charge no more than \$35 for an initial consultation. It is up to the attorney to control the length of the consultation. LRS clients are told to expect an in-office consultation. The \$35 consultation fee is a maximum, not a minimum.

Registration for certain Subject Matter Panels requires a separate form and affirmation showing that the panelist meets basic competency standards. The Subject Matter Panels are: 1) felony defense, 2) interstate/independent adoption, and 3) deportation.

Additional information and forms are available online at [www.osbar.org/forms](http://www.osbar.org/forms) and from the RIS staff.

LRS panelists agree to abide by the client service standards contained in the Joint Bench/Bar Statement on Professionalism (reproduced at right) and to use written fee agreements for any services performed on behalf of LRS clients beyond the initial consultation.

The LRS also administers an informal program for adolescents called Problem Solvers. By checking the appropriate box on the LRS registration form, attorneys agree to provide a free half-hour informational conference to people between the ages of 11 and 17.

### Statement of Professionalism:

LRS Panelists agree to abide by the Statement of Professionalism:

1. We will represent you responsibly, and with enthusiasm and dedication. We will vigorously protect your interests, including your right to confidentiality.
2. We will be trustworthy and honest in our dealings with you and others.
3. Your legitimate needs will determine the goals we pursue.
4. We will advise you against and will not pursue a course of conduct which is improper, unreasonable, without merit, or intended only to create delay or harass another.
5. We will conduct your legal affairs as efficiently and inexpensively as possible, and where appropriate, will advise you of alternative ways to resolve disputes. We will discuss available settlement opportunities promptly.
6. We will treat you and all others involved in your legal affairs, including other lawyers, with courtesy, respect and consideration.
7. We will represent you only in matters we can competently handle.
8. We will discuss our fee arrangement with you at the beginning of our relationship.
9. We will keep you informed about your legal affairs. We will provide you with copies of important papers and letters.
10. We will ensure your phone calls are returned promptly. We will be on time for meetings and court proceedings.

# Lawyer Referral Service Policies and Procedures

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## I. Program

### A. Goal

The goal of the Lawyer Referral Service (LRS) is to serve lawyers and the public by referring people who can afford to pay for legal services and need legal assistance to lawyers who have indicated an interest in or willingness to accept such referrals, and by providing ancillary information and alternative referral services.

### B. Program Year

The LRS shall operate on a 12-month program year beginning on July 1 and ending on June 30.

### C. Funding

Lawyers registering as LRS Panelists shall be charged a registration fee. The amount of the registration fee for each program year shall be determined by the Oregon State Bar Board of Governors. Additional funding plans may be implemented upon approval by the Board of Governors.

1. Payment of the registration fee shall entitle the panelist to participation only for the remainder of the program year to which the fee is applicable.
2. Refunds shall be paid only if requested prior to the commencement of the applicable program year.

### D. Eligibility

Lawyers satisfying the following requirements shall be eligible for participation in the program.

The attorney must:

1. be in private practice; and
2. be an active member of the Oregon State Bar who is in good standing; and
3. maintain malpractice coverage with the Professional Liability Fund or American Patent Law Association; and
4. have no disciplinary proceedings pending.

Lawyers satisfying the following additional requirements shall be eligible for participation in special subject matter panels. The lawyer must: a) meet standards for eligibility in the LRS; and b) meet the standards set for the specific subject matter panel.

### E. Registration

1. Qualifying lawyers shall be accepted as LRS Panelists upon payment of the registration fee and submission of the signed registration form which includes an agreement to abide by LRS Policies and Procedures.

2. Applications for special subject matter panels shall be reviewed by LRS staff in accordance with eligibility guidelines set by the Board of Governors. Challenges to an LRS staff decision on eligibility shall be reviewed by the Public Service Advisory (PSA) Committee, whose decision is final.

3. The LRS staff shall exercise its discretion in determining whether additional or duplicate registrations will be accepted. Duplicate registrations shall require additional fees. No duplicate registrations shall be made outside of the city where the attorney maintains his or her practice unless: a) the attorney maintains a second physical location where attorney-client meetings may take place; or b) the attorney's office is located within two (2) miles of the border between two locations.

### F. Operation

LRS staff shall develop and revise referral procedures and shall be responsible for the operation of the program. Procedures and rules of operation shall be consistent with the program goal and the following guidelines:

1. LRS staff may not comment on the qualifications of a Panelist and may not guarantee the quality or value of legal services.
2. LRS staff shall not make referrals on the basis of race, sex, age, religion, sexual orientation or national origin.
3. No more than three referrals may be made to a client for the same legal problem.
4. LRS staff may provide legal information and alternative referrals to social service agencies for those callers for whom a referral would not be appropriate, and may develop resource lists to assist in providing such information.

## II. Panelists

### A. Rules for Panelists

In order to remain eligible to receive referrals, each Panelist shall:

1. Continuously be an active member of the Oregon State Bar who is in good standing with malpractice coverage from the Professional Liability Fund or the American Patent Law Association and have no pending disciplinary proceedings.
2. Charge no more than \$35 for the initial consultation with a client referred by the LRS, except that no consultation fee shall be charged where: a) such charge would conflict with a statute or rule regarding attorney's fees in a particular type of case (e.g., workers' compensation cases), or b) the attorney customarily offers or advertises a free consultation to new or potential clients in a particular type of case.
3. Use written fee agreements for all services undertaken on behalf of LRS-referred clients beyond the initial office consultation.
4. Abide by the client service standards contained in the Joint Bench/Bar Statement of Professionalism.
5. Refer back to the LRS any client with whom the Panelist may not personally conduct the initial interview.
6. Participate only on those panels reasonably within the Panelist's competence or where the Panelist has been qualified to join a subject matter panel.
7. Cooperate with LRS staff by responding promptly to requests for information regarding the disposition of referrals.
8. Immediately notify the LRS if the Panelist is unable to accept referrals for a period of time due to vacation, leave of absence, heavy caseload, or any other reason.
9. Fill out and return all LRS Referral Notices within two weeks of the referral date.
10. Submit any fee disputes with clients referred by the LRS to the Oregon State Bar Fee Arbitration program.

### B. Enforcement

1. Panelists against whom disciplinary proceedings have been approved for filing shall be removed from the LRS until those charges have been resolved. Disciplinary proceedings shall include those authorized to be filed pursuant to Rule 3.4 of the Rules of Procedure. A matter shall not be deemed to be resolved until all matters relating to the disciplinary proceedings, including appeals, have been concluded and the matter is no longer pending in any form.

2. A Panelist whose status changes from "active member of the Oregon State Bar who is in good standing" shall be automatically removed from the LRS.

3. A Panelist may be removed from the program or any LRS panel if the Panelist fails to continue to maintain eligibility or otherwise violates the Rules for Panelists. Staff may temporarily remove a Panelist pending review by the PSA Committee at its next regularly scheduled meeting. Decisions of the PSA Committee regarding Panelist eligibility may be reviewed by the OSB Board of Governors, who shall determine whether the Committee's decision was reasonable.

4. Callers complaining about possible ethical violations by Panelists shall be referred to the Oregon State Bar Client Assistance Office.

5. A removed Panelist shall be entitled to a full fee refund if the removal occurred prior to the commencement of the program year to which the fee applies. A removed Panelist shall be entitled to a pro-rated refund if the removal occurs during a program year for which the Panelist has paid a registration fee. The amount of the refund shall be based on the number of full months remaining in the program year.

6. A removed Panelist who again meets all of the eligibility and registration requirements prior to the expiration of the program year during which the removal occurred may be reinstated for the remainder of that program year upon payment of the amount refunded under paragraph 5.