# Gus J. Solomon Inn of Court

Dedicated to improving the skills, professionalism, ethics and collegiality of the Portland legal community.

#### MEMBER HANDBOOK

2023-2024

"I LOOK UPON THE PRACTICE OF LAW AS AN OPPORTUNITY TO PARTICIPATE IN GREAT SOCIAL MOVEMENTS."

~ GUS J. SOLOMON, C. 1951



# Gus J. Solomon Inn of Court Key Information

#### **Websites**

http://www.gusjsolomoninnofcourt.org (Historical records; Written Materials for CLEs.)
http://www.innsofcourt.org/inns/gjsolomoninn (Meeting Info / Current Written Materials; Pupilage Group Rosters / Inn Directory)

Please keep your membership data up to date on the national website!

#### **Meeting Information**

#### Sept. 19, 2023 October 24, 2023 November 14, 2023 Jan. 16, 2024 February 20, 2024 March 19, 2024 April 16, 2024 May 21, 2024

#### **Meetings**

Sentinel Hotel\* 2<sup>nd</sup> Floor Library 614 SW 11<sup>th</sup> Ave.

5:00 p.m. – Social 5:45 p.m. – CLE

\*All in-person meetings budget permitting. Will announce any necessary changes via email on national website.

### etings

Joint Inn Meeting (TBD) EOY Dinner (TBD) Community Service (TBD)

#### **Executive Committee & Officers**

President: Tyler Volm <tvolm@sussmanshank.com>

Counselor (President-Elect)/Community Service: Margie Schroeder <margie@millerinsurancelaw.com>

Immediate Past-President: **Kendra Matthews** <a href="mailto:kendra@boisematthews.com">kendra@boisematthews.com</a> Treasurer/Membership: **Samuel Zeigler** <a href="mailto:samuel.b.zeigler@doj.state.or.us">samuel.b.zeigler@doj.state.or.us</a>

Secretary/Program: David Sorek <sorek@pdx.edu>

Membership: Kristen Tranetzki < kristen@angelilaw.com>

CLE Accreditation Coordinator/Web Guru: Lake Perriguey < lake@law-works.com>

Social/Facilities: Erling Hanna < EHanna@sbhlegal.com>

At Large Executive Committee Members:

Hon. Stacie Beckerman <stacie beckerman@ord.uscourts.gov>

Sonia Montalbano <sonia@mckeansmithlaw.com>

#### **Platinum Distinction**

In 2023-24, our Inn once again earned the "Platinum" distinction, which is the highest that can be achieved by an Inn. Kudos to us! Criteria include community outreach, mentoring, social events, membership handbooks, and program development.

### **Pupilage Groups**

A pupilage group is a team of 7-15 members with a mix of Students, Associates, Barristers, Masters, and Judges. During the Inn season, each group should:

- Meet regularly. (Ideally, Pupilage Groups should be meeting at least once a month, even after they present their CLE.)
- Plan and present 1-hour CLE
- Complete a Community Service Project of some sort together.

#### **Individual Member Responsibilities**

- Register/Attend CLEs (List is sent to Bar for CLE credit.)
- Assist in the preparation of a CLE presentation.
- Actively participate in pupilage group and Inn meetings and communicate with your group when you cannot!!
- Keep contact information up to date at American Inns of Court website. https://home.innsofcourt.org/

#### **Pupilage Group: Leaders**

The **Group Coordinator** will schedule group meetings and communicate the dates, times and locations (or method) of meeting.

The **Service Coordinator** will help the group coordinate a community service project.

The Written Materials Coordinator:

- 1 week before CLE: Submit written CLE materials to Lake Perriguey < lake@law-works.com >. Be sure to mention to Lake if the group believes the CLE qualifies for a special category CLE credit (e.g., Ethics or Access to Justice).
- 1 week before CLE: Submit a brief description of CLE program and the written materials to Tyler Volm < <a href="mailto:tvolm@sussmanshank.com">tvolm@sussmanshank.com</a>>.
- No later than 1 week after CLE: Submit AIC Program Submission form to Lake. The form is included in the Appendix and is also available on the national website:
   <a href="https://inns.innsofcourt.org/for-members/inns/the-gus-j-solomon-american-inn-of-court/inns-program-submission-form/">https://inns.innsofcourt.org/for-members/inns/the-gus-j-solomon-american-inn-of-court/inns-program-submission-form/</a>.

Pupilage group members should gather to share stories, build mentoring and networking relationships, learn about different practice areas, discuss ways to advance professionalism and ethical practices, and develop presentation skills.

### **Pupilage Group Rosters**

Pupilage group rosters will be maintained on the national AIC website. <a href="http://www.innsofcourt.org/inns/gjsolomoninn">http://www.innsofcourt.org/inns/gjsolomoninn</a>

### **CLE Presentations**

The primary mission of the Inn is to "foster excellence in professionalism, ethics, civility, and legal skills." One practical way we advance our mission is to ensure that seven of our meetings qualify for 1-hour of CLE credit each. Groups are welcome to use their "topic" as a springboard to any legal subject that interests them, so long as they check-in on the other group presentations to minimize overlap in content. There is no obligation to stage a full-blown production whether your presentation is in person or over Zoom production, etc. (Though groups that want to put on a real show are welcome to give it their best shot!) The point is that each group should determine the tone and content of their own presentation based upon what works best for them.

Guest speakers are welcome, but please remain cognizant of the dual purpose of our small groups: to forge connections among members and to provide members public speaking opportunities.

Each group is required to submit a Program Submission Form (included in the Appendix) documenting the details of your presentation. These are submitted to the American Inns of Court. If you would like your CLE submitted for a national award, consider polishing your materials and recording it. This year's topic:



Pupilage groups will be presenting on important topics that impact both our professional and personal lives in these turbulent times.

The specific topics for the presentations will be maintained on the National AIC website http://www.innsofcourt.org/inns/gjsolomoninn.

#### Don't Forget:

- Please submit your written materials and a brief description of the CLE to Lake Perriguey
   <a href="mailto:lake@law-works.com">lake@law-works.com</a> and Tyler Volm <a href="mailto:tvolm@sussmanshank.com">tvolm@sussmanshank.com</a> ONE WEEK before the CLE presentation.
- No later than a week after your presentation, please submit a completed program submission form to Lake Perriguey < <a href="mailto:lake@law-works.com">lake@law-works.com</a>>. The form is in the Appendix and is also available on the national website: <a href="https://inns.innsofcourt.org/for-members/inns/the-gus-j-solomon-american-inn-of-court/inns-program-submission-form/">https://inns.innsofcourt.org/for-members/inns/the-gus-j-solomon-american-inn-of-court/inns-program-submission-form/</a>.

### **CLE Key Rules**

It is each pupilage groups' responsibility to ensure that their presentation meets the requirements to secure CLE credit. If you have any questions, please consult the OSB rules: <a href="https://www.osbar.org/">https://www.osbar.org/</a> docs/rulesregs/mclerules.pdf Here, however are a few key reminders: A program must "include the use of thorough, high-quality written materials[.]" OSB MCLE 5.1(c).

#### OSB MCLE Rule 5.13 provides:

- (a) The activity must have significant intellectual or practical content with the primary objective of increasing the participant's professional competence as a lawyer; and
- (b) The activity must deal primarily with substantive legal issues, legal skills, practice issues, or legal ethics and professionalism, or access to justice.

If you want to present a program that will qualify for Ethics, Child and Elder Abuse Reporting, Mental Health and Substance Use Education or Access to Justice credit, please pay particular attention to OSB MCLE Rule 5.14.

### OSB MCLE Rule 5.14 (Ethics, Child and Elder Abuse Reporting, Mental Health and Substance Use Education, and Access to Justice) provides:

- (a) In order to be accredited as an activity in legal ethics under Rule 3.2(b), an activity shall be devoted to the study of judicial or legal ethics or professionalism, and shall include discussion of applicable judicial conduct codes, rules of professional conduct, or statements of professionalism.
- (b) Child and elder abuse reporting programs must be devoted to the lawyer's statutory duty to report child abuse and elder abuse (see ORS 9.114).
- (c) In order to be accredited as a mental health and substance use education credit under Rule 3.2 (d), and activity shall educate attorneys about causes, detection, response, treatment, or problem prevention related to mental health or substance use.
- (d) In order to be accredited as an activity pertaining to access to justice for purposes of Rule 3.2(e), an activity shall be directly related to the practice of law and designed to educate attorneys to identify and eliminate from the legal profession, from the provision of legal services, and from the practice of law barriers to access to justice arising from biases against persons because of age, culture, disability, ethnicity, gender and gender identity or expression,

- geographic location, national origin, race, religion, sex, sexual orientation, veteran status, immigration status, and socioeconomic status.
- (e) Portions of activities may be accredited for purposes of satisfying the ethics and access to justice requirements of Rule 3.2, if the applicable content of the activity is clearly defined.

### **Community Service**

Community outreach coordinator, Margie Schroeder < margie@millerinsurancelaw.com >, will be working to schedule service projects for the entire Inn. She will communicate with each group's Service Coordinator but reach out to her if you have thoughts or want to help.

We appreciate that it is ambitious, but each group should try to "get out there," in some way too. If you do, please let the rest of the Inn know at a meeting and send our president, **Tyler Volm** < tvolm@sussmanshank.com >, a few photos that he can share with the Inn and, possibly, the national organization.

### Membership

#### Roster

A full copy of our membership roster is available on the AIC version of the Solomon Website: <a href="https://inns.innsofcourt.org/inns/members.aspx?innid=30049">https://inns.innsofcourt.org/inns/members.aspx?innid=30049</a>. You *must* be signed in to be directed to the page. To get the entire list, make sure the "Chapter Status" lists "Active" as its criteria (and that no other box has an entry) and click search.

Member names for each pupilage group are also available on the "Teams" drop down on the National Website. (Each month's program is listed as a hyperlink; if you click on the link, it will take you to a roster. The tab is updated for the year after the September meeting.)

#### **Membership Categories**

**Judges** 

Masters of the Bench: At least 15 years practice

Barristers: 5+ years

Associates: 0 to 5 years

Pupils: Law students

Emeritus & Honorary Members: Retired practitioners or otherwise designated by EC

The Inn is a great place to make new professional connections and friends. In addition to connecting to the friends within the Inn, we encourage you to reach out to new and different people, particularly across membership categories.

#### **Applications for Membership**

Applications for membership (whether new or for renewal) are, ideally, submitted by early June, along with payment of dues in full. We do not want finances to be an impediment to membership, but we can only accommodate a limited number of people paying on a delayed schedule, so people are encouraged to reach out to the Treasurer if making a payment in full will be an issue. (See also Marc D. Blackman Grant section below.)

Applications (whether new or renewal) are considered on a rolling basis. Traditionally, we have been able to accommodate qualified applicants who submit applications late in the process. However, you should anticipate that the Executive Committee is working to finalize the roster as early as possible and that if you delay submitting your renewal application, you might find yourself on the outside looking in.

We also ask that before you submit a renewal application you take a moment to reflect on whether you were a "good" Inn member during the past year. Did you show up? Did you stay in touch with your pupilage group? (Could they pick you out of a line-up?) If you were not a good Inn-mate, was it a fluke or are the disruptions likely to continue into the next year? We all know that our profession, and our lives, can be unpredictable. Our Inn functions best, however, when people who know—heading into the year—that their schedule is not going to permit meaningful participation self-identify and take off a year.

#### **Increasing the Diversity of our Inn**

As noted on the page that follows, the Inn is committed to the goals of inclusiveness. In 2024, we started a "pilot" program in which we asked members of the Inn to consider donating the cost of an Associate Membership (currently \$258) so that we could offer a free membership to an attorney who is a member of an affinity bar association (<a href="http://www.osbar.org/members/localbars.asp">http://www.osbar.org/members/localbars.asp</a>). We were able to secure donations for three memberships. We hope to continue to develop this program in the coming years.

If you are interested in the development of this program or in making a donation to support it, please reach out to a member of the executive committee. (See page 1 for a list.) The American Inn of Court is a 501(c)(3) organization and, thus, the non-meal portions of donations are tax deductible. (Of course, members should always consult their tax advisor before taking any deduction.)

#### Marc D. Blackman Membership Discount

Our Inn has a membership discount to honor founding member and former Inn President Marc D. Blackman (1947-2014). Following a clerkship with Chief Justice Kenneth O'Connell of the Oregon Supreme Court, Marc became an Assistant United States Attorney for the District of Oregon. In 1977, Marc founded what would become known as Ransom Blackman LLP. He specialized in criminal defense for the next 36 years. Marc devoted his professional life to seeking justice and assuring access to

justice for everyone. He was known for his public service work, for his dedication to his clients, and for his genuine modesty. Marc cared deeply about advancing the goals of the Gus J. Solomon Inn of Court.

The so-called Blackman Discount is something we have tried to work into our budget to offer a discount to members of the Bar who have demonstrated commitment to public service in the practice of law (e.g. public defender, legal services, civil rights law) and whose means are such that paying regular dues would be difficult. Depending on the qualified applicants, the discount may vary in amount as the Executive Committee may elect to offer multiple qualified applicants a reduced membership, rather than one applicant a free membership. Even if you do not qualify for the discount, please consider whether you know someone you'd like to encourage to apply. Applications for future grants will generally be due no later than August of each year. We do NOT publicize who receives this discount.

### **AIC Diversity Policy**

The American Inns of Court Embraces and Encourages Diversity and Inclusiveness.

More than just an organization, the American Inns of Court is the embodiment of an ideal. We are dedicated to upholding the standards of the legal profession, to practicing law with dignity and respect, and to encouraging respect for our system of justice. Achieving a higher level of excellence and developing a deeper sense of professionalism occur only with an abiding commitment to the goals of diversity and inclusiveness.

The American Inns of Court firmly believes that personal diversity in all its aspects is essential to our ability to accomplish our mission. Diversity embodies all those differences that make us unique individuals and includes people of different race, ethnicity, culture, sexual orientation, gender, religion, age, personal style, appearance, physical ability as well as people of diverse opinions, perspectives, lifestyles, ideas and thinking. We value the differences in views and perspectives and the varied experiences that are part of a diverse membership. Diversity enriches and broadens our membership, which in turn leads to more creative and meaningful programs.

For the same reasons, the American Inns of Court values professional diversity. Legal professionals and law school faculty, administrators, and students, from all disciplines, from all practice types, from both the public and private sectors, from all economic strata, and from the least experienced to the most seasoned are vital to maximizing the Inn experience. Only by drawing and retaining a diverse membership will we guarantee the success of our unique organization as well as our respective professional pursuits. Therefore, the American Inns of Court are committed to creating and maintaining a culture that promotes and supports diversity not only throughout our organization, but in our profession as well.

### Hon. Gus J. Solomon

United States District Court Judge for the District of Oregon Appt. 1950 ~ Chief Judge 1958-71 ~ Sen. Judge 1971-87

In 1929, anti-Semitism & the Depression drove Solomon into a struggling legal practice for small businesses & fellow Jewish people. He labored for equal opportunities for Jewish people, African-Americans, & others in and out of his profession. He helped establish Legal Aid (1936). He handled cases for the ACLU, serving as local counsel in *DeJonge v. Oregon*, 299 U.S. 353 (1937) ("[P]eaceable assembly for lawful discussion cannot be made a crime."). He helped end Portland law firms' discrimination in hiring & promoting Jewish people & women & local social clubs' bans on Jewish people.

As Oregon's longest serving federal judge, his legacy includes several key civil rights decisions. *See, e.g., Falkenstein v. Or. Dept. of Rev.,* 350 F.Supp. 887 (D. Or. 1972) (Portland Elks Lodge not state tax exempt due to racially exclusive membership policies); *Henderson v. [BOLI],* 405 F.Supp 1271 (D. Or. 1975) (use of different life expectancy tables for women to determine benefits unlawful discrimination); *Burton v. Cascade School Dist. Union High School No. 5,* 353 F.Supp. 254 (D. Or. 1973) (immorality statute used to fire gay teacher unconstitutionally vague).

Founded March 10, 1988, the Gus J. Solomon Inn of Court carries on the traditions of this diligent, able, energetic and colorful lawyer & judge. In pursuing Judge Solomon's ideals, we advance egalitarian principles and actively attempt to foster a membership diverse in race, ethnicity, sexual preference, & income.

For More See: Gus J. Solomon: Liberal Politics, Jews, & the Federal Courts (2006), by Harry Stein. Info. Reprinted with Permission of H.Stein.

### **Appendix:**

- AIC Professional Creed
- AIC Program Submission Form
- How to Access your AICF Profile



#### AMERICAN INNS OF COURT

# Professional Creed

hereas, the Rule of Law is essential to preserving and protecting the rights and liberties of a free people; and

Whereas, throughout history, lawyers and judges have preserved, protected, and defended the Rule of Law in order to ensure justice for all; and

Whereas, preservation and promulgation of the highest standards of excellence in professionalism, ethics, civility, and legal skills are essential to achieving justice under the Rule of Law;

Now therefore, as a member of an American Inn of Court, I hereby adopt this professional creed with a pledge to honor its principles and practices:

- I will treat the practice of law as a learned profession and will uphold the standards of the profession with dignity, civility, and courtesy.
- I will value my integrity above all. My word is my bond.
- I will develop my practice with dignity and will be mindful in my communications with the public that what is constitutionally permissible may not be professionally appropriate.
- I will serve as an officer of the court, encouraging respect for the law in all that I do and avoiding abuse or misuse of the law, its procedures, its participants, and its processes.
- I will represent the interests of my client with vigor and will seek the most expeditious and least costly solutions to problems, resolving disputes through negotiation whenever possible.
- I will work continuously to attain the highest level of knowledge and skill in the areas of the law in which I practice.
- □ I will contribute time and resources to public service, charitable activities, and pro bono work.
- $\bigcirc$  I will work to make the legal system more accessible, responsive, and effective.
- I will honor the requirements, the spirit, and the intent of the applicable rules or codes of professional conduct for my jurisdiction and will encourage others to do the same.



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#### **Program Submission Form**

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Role	Membership Category

#### Agenda of Program:

List the segments and scenes of the demonstration and the approximate time each item took; i.e., "Introduction by judge (10 minutes)."

Item	Time

**Program Awards:** Please complete this section **only** if the program is being submitted for consideration in the Program Awards.

Describe how your program fits the Program Awards Criteria:

**Relevance:** How did the program promote or incorporate elements of our mission? (To inspire the legal community to advance the rule of law by achieving the highest level of professionalism through example, education and mentoring)

Entertaining: How was the program captivating or fun?

Creative and Innovative: How did the program present legal issues in a unique way?

**Educational:** How was the program interesting and challenging to all members?

Easily Replicated: Can the program be replicated easily by another Inn? Yes No This program is: Original Replicated

#### **Questions:**

Please contact us at (571) 319-4713 or by e-mail at programlibrary@innsofcourt.org.

Please include ALL program materials. The committee will not evaluate incomplete program submissions.



# How to Access and Update Your Profile on the American Inns of Court Website <a href="https://home.innsofcourt.org">home.innsofcourt.org</a>

As a member of the American Inns of Court, you can access great content to help you make the most of your membership experience. We have numerous resources and features that are open to browse on our website including:

- About the American Inns of Court Foundation
- Awards and Scholarship Information
- The Model Mentoring Program

Similarly, there are some content items that are members-only including:

- Ordering programs from the <u>Program Library</u>
- Accessing the national Member Directory
- Updating your member profile

The key to accessing the members-only information is having your up-to-date email address on file with the national American Inns of Court Foundation. When your membership record is established in the national database, a member account is automatically created that will allow you to access *members-only* content.

#### How do I Log into the Website?

- Navigate to the American Inns of Court website home.innsofcourt.org
- 2. Click **Sign In** at the top of the page
- 3. Enter your username (e-mail address) and password
- 4. Check the **Remember Me** box to have the system remember your information
- 5. Click Sign In

#### What is my Username?

Your e-mail address serves as your username to login to the website.

#### How Do I Get a Password?

- 1. Navigate to the American Inns of Court website home.innsofcourt.org
- 2. Click **Sign In** at the top of the page (See figure at right)
- 3. If you have never visited the website or have forgotten your password, Click Forgot My Password
- 4. Enter your email address as your Username and click **Submit.** When you do, a system-generated password will be sent to the e-mail address in your member record. If you request your password but do not receive it within 24 hours, please contact the national office at (703) 684-3590.

You may receive the following error message: "We could not find your information in our system." If you receive this message, please contact the national office at (703) 684-3590. In order to correct this problem, we simply need to update your e-mail address in our database.





#### **How do I Update My National Profile and Contact Information?**

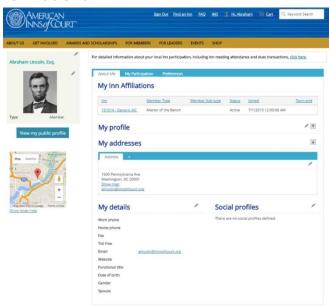
Once you are logged in, click on <u>Hi, (First Name)</u> at the top of the page.

On the **About Me** tab, you can edit: Name, Contact information, Profile information, Address, and Social profiles.

- To edit any section, click the pencil icon:
- This will allow you to add or edit information
- Click Save to save changes

On the **My Participation** tab, you can view: Communities, National Committees, Upcoming National Events Registrations, Recent Transactions from the National organization, and Donation history. You can also print statements for any open invoices.

On the **Preferences** tab, you can change your password.



## How do I View my Inn of Court Teams, Meeting Invitations and Invoices?

If your Inn is using the IMS or Inn Management, you will be able to see your Inn committees, Pupillage team assignments, outstanding invoices (if your Inn is using the Finance module) and meeting invitations.

Once you are logged in, click on **IMS** link at the top of the page. In the banner across the top of the page you will see links for: *My Profile, My Commitees, My Teams, Pay My Invoices*, and *My Meetings*.







Meeting invitations will be sent to you by email through this

system. To RSVP for a meeting, simply click the RSVP link that is included in the email you receive. You can also log into the website and RSVP by going to the *My Meetings* link. Note: if the RSVP deadline has passed, you will be unable to RSVP online (either through the email or the website), and must contact your Inn administrator or officers responsible for the meeting.

<u>Dues Invoices</u> may also be sent to you by email through the IMS. If your Inn uses the financial module and offers online credit card payments as an option, you can review and pay your Inn dues by credit card by clicking the *Pay My* Invoices link.



#### **How do I Access the Program Library?**

- 1. Once you are signed in, navigate to the **For Members** page and then to the **Program Library** page.
- 2. Click on the Online Program Library button in the upper right corner
- 3. Search for any program by keyword, topic, program number, or material type.
- 4. Once you have completed your order of programs from the Library, you will receive a confirmation email containing a link to download the program materials. If the materials are too large or contain video, the materials will be shipped to you within 24 hours.



Member log-in required.

If you have any questions or need any assistance, please contact the national office at (703) 684-3590. Thank you for making the most of your American Inns of Court membership.

Updated 06/20/17