

# ATTACHMENT C

## STATEMENT OF QUALIFICATIONS (SOQ)

**(Revised Pursuant to Addendum No. 1, August 12, 2016)**

Section 1: ADR Provider Contact Information & Languages			
Last Name	Amato	First Name	Lisa
Company Name	Amato Mediation		
Business Address	621 SW Morrison St, Suite 1300		
City	Portland	State	OR
Zip Code	97205	Phone 1	503.789.3262
E-mail	lisa@amatomediation.com		
Web Site	www.amatomediation.com		
Languages Spoken		Fax #	N/A
Section 2: Provider Overview			
<p>The following Section provides a brief overview of the provider's experience and qualifications</p> <p><b>I graduated from Willamette University College of Law in 1991. My legal career has always been solidly in the litigation field, beginning with personal and property injury and commercial litigation, and then later business litigation, construction and real estate litigation, and employment litigation and civil rights. The majority of my litigation career has been in employment law. I added mediation and arbitration to my professional services in 2009. The vast majority of the private mediation work I do comes from attorney referrals, and the others are from the EEOC mediator roster, U.S. District Court of Oregon mediator roster, and the Multnomah County Probate mediation roster. From 2010 to 2015, I regularly volunteered with the Multnomah County Small Claims Court and for a lesser amount of time at Clackamas County Dispute Resolution Services.</b></p> <p><b>I have held leadership positions with the Oregon Mediation Association and the Oregon State Bar ADR Section, and I continue to be actively involved. I have written articles on mediation and have given presentations and training. Improving the skills of mediators and the overall quality of mediation services provided in this state is very important to me.</b></p> <p><b>The substantive areas listed in Section 4A flow from my legal experience and other professional and personal interests.</b></p>			

## Section 3 Services Offered and Rate

Type of Service Key Person Desires to Offer & is Qualified to Offer	ADR Provider Billing Rate per hour	Support Staff Billing Rate Per Hour (Rate/Title)	The following items, if checked, are expenses that may be passed through at cost to the agency (See Price Agreement for details):
<input checked="" type="checkbox"/> 1. A <u>Mediation General Practitioner</u> is an impartial third party who assists two or more parties in reaching a mutually acceptable resolution to a controversy. These Practitioners have broad mediation experience and skills and are able to adapt mediation to a wide variety of circumstances, including workplace disputes.	200.00	00.00 to 00.00 (range) Administrative Assistant	<input type="checkbox"/> Copy/print charges <input checked="" type="checkbox"/> Facility Use/ Rental Fees
<input type="checkbox"/> 2. A <u>Facilitation General Practitioner</u> is an expert at helping large groups work effectively towards a desired objective. These Practitioners have sufficiently broad experience and skills so as to be able to design and facilitate a large group process to achieve variety of goals or objectives.	00.00	00.00 to 00.00 (range) Administrative Assistant	<input type="checkbox"/> Copy/print charges <input type="checkbox"/> Facility Use/Rental Fees
<input type="checkbox"/> 3. A <u>Public Policy Facilitator</u> is an expert at helping governmental entities and diverse stakeholders reach agreement on controversial public policies or public projects, often within a complex legal, political or regulatory context. These providers are experienced at assessing, designing, convening and facilitating collaborative processes.	00.00	00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title	<input type="checkbox"/> Copy/print charges <input type="checkbox"/> Facility Use/Rental Fees
<input type="checkbox"/> 4. A <u>Public Involvement Practitioner</u> is an expert at helping governmental entities engage the public on public issues or projects. These providers are able to design and implement an appropriate public involvement process from projects that seek to inform or educate the public to projects that allow for greater public involvement via consultation or collaboration.	00.00	00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title	<input type="checkbox"/> Copy/print charges <input type="checkbox"/> Facility rental fees <input type="checkbox"/> Mail or bulk email fees <input type="checkbox"/> Telephone charges <input type="checkbox"/> Website hosting, online software or online services fees <input type="checkbox"/> Video production services <input type="checkbox"/> Other Subcontractors



**Section 4A: Does the Provider charge travel expenses to provide services in your area?**

County or County Area	Available to work in this area without charging travel expenses.	Available to work in this area but will charge travel expenses
1 Clatsop, Columbia, Tillamook – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 Washington, Multnomah – Counties	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3 Polk, Marion, Yamhill – Counties	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4 Lincoln, Benton, Linn – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5 Lane – County	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6 Douglas – County	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7 Coos, Curry – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8 Josephine, Jackson – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9 Hood River, Wasco, Sherman, Gilliam, Wheeler	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 Jefferson, Crook, Deschutes – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11 Lake, Klamath – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
12 Morrow, Umatilla – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
13 Wallowa, Union, Grant, Baker – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
14 Harney, Malheur – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
15 Clackamas – County	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Section 4B: Hourly Travel Charges.** *If, in addition to allowable travel expenses, the Provider will charge for travel time and the travel time of administrative assistants or staff, or both, the hourly travel rate for Proposer and each of Proposer's administrative assistant and staff must be identified here: :*

**Proposer hourly rate for travel: \$50/hr**

**Section 5: Standards the Provider Subscribes to and Licenses Held**

- ☒ Oregon Mediation Association Core Standards of Mediation Practice, April 23, 2005  
(<http://www.mediate.com/oma/pg61.cfm>)
- ☐ Association for Conflict Resolution, Model Standards of Conduct for Mediators, 2005 revisions.  
[http://www.imis100us2.com/acr/ACR/Resources/Model\\_Standards/ACR/Resources/Model\\_Standards.aspx?hkey=315fc2bd-2cac-422b-82bf-b3160b6a1b08](http://www.imis100us2.com/acr/ACR/Resources/Model_Standards/ACR/Resources/Model_Standards.aspx?hkey=315fc2bd-2cac-422b-82bf-b3160b6a1b08)
- ☐ Model Standards of Practice for Family and Divorce Mediation  
[http://www.imis100us2.com/acr/ACR/Resources/Model\\_Standards/ACR/Resources/Model\\_Standards.aspx?hkey=315fc2bd-2cac-422b-82bf-b3160b6a1b08](http://www.imis100us2.com/acr/ACR/Resources/Model_Standards/ACR/Resources/Model_Standards.aspx?hkey=315fc2bd-2cac-422b-82bf-b3160b6a1b08)
- ☐ International Association for Public Participation (IAP2), Code of Ethics for Public Participation Practitioners (See  
<http://www.iap2.org/displaycommon.cfm?an=1&subarticlenbr=8>)
- ☒ Other professional standards that the provider subscribes to: **ORS Chapter 36; Oregon Rules of Professional Conduct (for lawyers);**
- ☒ Oregon State Bar # **920253**
- ☒ Other professional licenses: **Washington State Bar #23097**



**Section #6: Provider's Specialized Areas of Expertise**

<i>Area of Expertise</i>	<i>Sub Specialty</i>	<i>Areas of expertise</i>
Business and Finance	General	<input checked="" type="checkbox"/>
	Investment and Finance	<input type="checkbox"/>
	Patents or Intellectual Property Rights	<input type="checkbox"/>
Civil Rights	Civil Rights	<input checked="" type="checkbox"/>
Consumer	All Types, Consumer-Merchant Disputes	<input checked="" type="checkbox"/>
	Assistive Technologies	<input type="checkbox"/>
	Vehicle Sales, Service or Repair	<input type="checkbox"/>
Cultural	Cross Cultural, Ethnicity, or Related Fields	<input type="checkbox"/>
Education	Education	<input checked="" type="checkbox"/>
	Special Education	<input checked="" type="checkbox"/>
Environmenta	Agricultural Exceptions (goal 2)	<input type="checkbox"/>
	Agriculture	<input checked="" type="checkbox"/>
	Air, Land and Water Quality	<input checked="" type="checkbox"/>
	Coastal	<input type="checkbox"/>
	Endangered Species or Wildlife	<input checked="" type="checkbox"/>
	Energy	<input type="checkbox"/>
	Forestry	<input checked="" type="checkbox"/>
	Hazardous Materials and Environmental	<input type="checkbox"/>
	Other Natural Resource Related	<input type="checkbox"/>
	Water Resources, Wetlands	<input checked="" type="checkbox"/>
Governmental and Regulatory	Government-to-Government (e.g., state-tribal)	<input type="checkbox"/>
	Professional Licensing	<input checked="" type="checkbox"/>
	Public Utilities	<input type="checkbox"/>
Human Services	Child Dependency and Permanency Planning (Adoption)	<input type="checkbox"/>
	Disability	<input type="checkbox"/>
	Family Services, including Service Plans	<input type="checkbox"/>
	Health Care	<input type="checkbox"/>
	Senior Services	<input type="checkbox"/>
	Social Services	<input type="checkbox"/>
	Vocational Rehabilitation	<input type="checkbox"/>
	Public Assistance - AFS	<input type="checkbox"/>
International	International	<input type="checkbox"/>
Labor and Employment	Collective Bargaining and Labor	<input type="checkbox"/>
	General Employment and Human Resources	<input checked="" type="checkbox"/>
	Workers' Compensation	<input checked="" type="checkbox"/>
	Workplace Interpersonal Disputes	<input checked="" type="checkbox"/>
Torts or Insurance Claims	Torts or Insurance Claims	<input checked="" type="checkbox"/>
Transportation, Housing and Land Use	Construction Industry & Contracts, Civil Engineering	<input checked="" type="checkbox"/>
	Eminent Domain	<input checked="" type="checkbox"/>
	General Planning	<input type="checkbox"/>
	Growth Management	<input type="checkbox"/>
	Housing	<input type="checkbox"/>
	Land Use	<input type="checkbox"/>
	Railroad	<input type="checkbox"/>
	Real Property	<input checked="" type="checkbox"/>
	Siting Controversial Projects or Facilities	<input type="checkbox"/>



## **Section 7: Relevant Education and Training**

Advanced Mediation Training Pepperdine Law School (18) June 2016  
Oregon Mediation Association Annual Conference (9.5 hrs) Nov. 2015  
Expanding Diversity in Court Connected ADR Programs (1.0 hrs) Sept. 2015  
Anger The Silent Decision Maker (1.25 hrs) Apr. 2015  
The Role of Gender in ADR (1.0 hrs) Nov. 2014  
Oregon Mediation Association Annual Conference (9.5 hrs) Nov. 2014  
OSB Alternative Dispute Resolution Annual Conference (6.75 hrs) Oct. 2014  
International Academy of Mediators Annual Conference (11.0/hrs) May 2014  
Oregon Mediation Association Annual Conference (9.5 hrs) Nov. 2013  
The Strategic Mediator (6.5 hrs) Feb. 2013  
Oregon Mediation Association Annual Conference (9.5 hrs) Nov. 2012  
Strengthening Relationships and Resolving Conflicts (6.0 hrs) June 2012  
OSB Alternative Dispute Resolution Annual Conference (6.25 hrs) May 2012  
NW Dispute Resolution Conference (5.5 hrs) May 2012  
Oregon Mediation Association Annual Conference (9.5 hrs) Nov. 2011  
Confidentiality in Mediation (1.5 hrs) Nov. 2011  
Ethics in Mediation (1.0 hrs) Oct. 2011  
Limits on Professional Obligations (3.0 hrs) December 2010  
Foreclosure Mediation Training (2.0 hrs) Nov. 2010  
Adventures in Cross Cultural Mediation (2.0 hrs) Nov. 2010  
Oregon Mediation Association Annual Conference (9.5 hrs) Nov. 2010  
OSB Alternative Dispute Resolution Annual Conference (6.5 hrs) Oct. 2010  
Understanding and Managing High Conflict Personalities (6.5 hrs) May 2010  
Deception and Limits on Professional Obligations (3.0 hrs) Dec. 2009  
Confidentiality in Federal Court Mediation (1.0 hrs) Nov. 2009  
Oregon Mediation Association Annual Conference (9.5 hrs) Nov. 2009  
OSB Alternative Dispute Resolution Annual Conference (6.25 hrs) Nov. 2009  
Mediator Approaches and Keeping Secrets (1.0 hrs) Oct. 2009  
Probate Mediation Training (12.25 hrs) June 2009  
Fifty Ways to Break Impasse (1.5 hrs) June 2009  
Resolving Conflict in the 21st Century (13.75 hrs) Apr. 2009  
Oregon Mediation Association Annual Conference (9.5 hrs) Nov. 2008  
Meta Mediation (2.0 hrs) March 2008  
Multnomah County Circuit Court Training (8.0 hrs) January 2008  
Oregon Mediation Association Annual Conference (9.5 hrs) Nov. 2007  
Advanced Workplace Mediation Training (16.0 hrs) Oct. 2007  
Basic Plus Mediation Skills Training (36 hrs) June 2007

## **Section 8: Relevant Training Conducted by the Provider**

How to Mediate and Arbitrate Like a Pro Sept. 2014  
What's New in ADR? Oct. 2014  
Mediating Employment Cases June 2014



Mediation Advocacy in Employment Cases Oct. 2013  
Fee Arbitration and Mediation Oct. 2013  
Conversation Roles and Healthy Discussions Nov. 2012  
Confidentiality Nov. 2012  
Advanced Strategies for Counsel and Professionalism in Mediating the  
Employment Case Sept. 2011  
Mediation Strategies Sept. 2011  
Negotiation Styles May 2011  
Hot Topics in Mediation Nov. 2010  
Mediation Styles: Do They Matter? Oct. 2010  
Effective Representation of Clients in Mediation Oct. 2009  
Negotiation Mechanics and Best Practices June 2008

### Section 9: Workplace Mediation Experience

As a private mediator, my workplace mediations come from private referrals and the EEOC mediation roster.

Traditional workplace mediations: I have mediated four (4) traditional workplace mediations in which I was contacted directly by private businesses and one city in Oregon. These workplace mediations took an average of twenty (20) hours of my professional time, and involve intake, talking with parties and other stakeholders, and meeting for one or more mediation sessions. Approximate total time: 80 hours.

EEOC mediations: I have mediated sixteen (16) EEOC cases in the last five years. EEOC parties have included two (2) city governments, one (1) county, and private businesses. EEOC cases take an average of eight (8) hours of my professional time, which I spend on the phone talking with the complainant (and attorney if represented) and the respondent (and attorney if represented), reviewing mediation submissions, conducting follow-up phone calls, mediating with the parties in the mediation session, and reporting back to the EEOC ADR coordinator. Approximate total time: 128 hours.

### Section 10: Litigation Settlement Related Experience

I am a practicing attorney. My law practice is litigation based, and most of my mediations are litigation settlement at any stage - pre-filing, post-filing, and appeal. My litigation experience is in business/commercial, real estate transactional, employment, civil rights, and personal injury and property litigation. In these mediations, nearly all parties are represented by attorneys. I have mediated litigation settlement cases with private companies and with at least three (3) school districts and one (1) public entity. The litigation settlement cases primarily come to me by either private attorney referral, U.S. District Court Mediator Roster, or Multnomah County Probate Roster.

Employment cases: I have mediated at least nineteen (19) cases. Issues range from wage and hour, overtime, misclassification of independent contractor; statutorily protected class discrimination, harassment and retaliation;



whistleblowing; bullying; and breach of employment contract. Each employment mediation takes approximately 15-18 hours of my professional time and commonly involves two to three named parties and have one mediation session in person. At the mediation session, there may be insurance adjusters, multiple company representatives, and the plaintiff(s). Attorneys are always present as party representatives.

Business transactional cases: In the last six (6) years, I have mediated four (4) business disputes. Disputes involve breach of professional services/delivery contract and breach of consumer goods contract. These mediations take approximately 12-15 hours of my professional time and commonly involve two to four named parties. At the mediation session, there are typically multiple company representatives for each party and attorneys always participate.

Probate, guardianship, and elder law cases: I have mediated six (6) probate, guardianship and elder law cases that have been filed in Multnomah County Probate Court. Four (4) of these cases have involved a professional guardian and involved family disputes about the services provided. Two (2) cases were multi-party family will contests in which not all family members had legal representation. These cases take between 6-12 hours of my professional time.

Professional malpractice and licensing cases: I have mediated three (3) cases with Oregon Professional Liability Fund (PLF) involving legal malpractice. Two (2) cases involved two parties (plaintiff/former client) and former lawyer/PLF. One (1) case involved multiple parties as more than one lawyer, and a law firm was represented by the PLF. These cases take between 10-15 hours of my professional time.

From 2010 through 2015, I mediated frequently with the Multnomah County Small Claims Court as a volunteer. In one day I would have one to three cases and the total amount of my professional time each day was less than four (4) hours. I am not counting these cases in the below total.

Approximate total time: 399 to 502 hours

### Section 11: Overall Mediation Experience

In 2008, I began volunteering as a mediator with the Clackamas County Dispute Resolution Service and with Multnomah County Small Claims Court. Since 2009, I have incorporated a professional mediation practice into my law practice. I have been on the U.S. District Court mediator roster since 2009, the EEOC mediator roster since 2010, and the Multnomah County Civil Court and Probate Roster since 2008. I receive numerous referrals each year from these rosters.

Continued mediation education and working with organizations and committees on the improvement of mediator quality and mediation standards is very important to me.

Education: As evidenced above, my continued education is very important to me. I want always to be learning, building upon and improving my skills as a mediator. I am in the formal mentor program with the International Academy of



**Mediators.** I attend annual conferences when I can, I participate in a structured mentee program, and I work closely with my mentor.

**Organization and Committee Involvement:** I have held leadership positions with the Oregon Mediation Association (Board Member and Vice President), Clackamas County Dispute Resolution Advisory Board, the Oregon State Bar ADR Section (Co-Chair and Treasurer), and the Federal Bar Association ADR Section (Vice-Chair and Treasurer). I continue to contribute on committees for the Oregon Mediation Association, Oregon State Bar ADR Section, and the Federal Bar Association ADR Section.

As described above in Sections 2 and 10, my mediation practice and experience is, for the most part, comprised of litigation settlement cases (civil commercial, employment, civil rights, probate/guardianship, professional malpractice and licensing), business and partnership disputes, and EEOC mediations.

## **Section 12: Facilitation Experience**

## **Section 13: Public Policy Facilitation Experience**

## **Section 14: Experience as a Public Involvement Practitioner**