

**WASHINGTON STATE**  
**B A R A S S O C I A T I O N**

**Board of Governors Meeting**  
**Meeting Materials**

**January 13-14, 2023**  
**WSBA Conference Center**  
**Seattle, WA**  
**Zoom and Teleconference**



**Board of Governors Meeting  
WSBA Conference Center, Seattle, WA  
January 13-14, 2023**

*WSBA Mission: To serve the public and the members of the Bar, to ensure the integrity of the legal profession, and to champion justice.*

**ALL ITEMS ON THIS AGENDA ARE POTENTIAL ACTION ITEMS**

**To participate call 1.888.788.0099**

**Friday, January 13<sup>th</sup> : Meeting ID: 876 8648 0110 Passcode: 305219**

<https://wsba.zoom.us/j/87686480110?pwd=QXIEWVA2cDQ2WDVHMFBMdk0rWUthQT09>

**Saturday, January 14<sup>th</sup> : Meeting ID: 870 9803 5467 Passcode: 497068**

<https://wsba.zoom.us/j/87098035467?pwd=eExHKzNzSWtqR0VqRzE1cWY2bVRrUT09>

**FRIDAY, JANUARY 13, 2023**

**9:00 AM – CALL TO ORDER & WELCOME**

**SPECIAL REPORT**

- ACCESS TO JUSTICE BOARD REPORT**.....5

**MEMBER & PUBLIC COMMENT**

- MEMBER AND PUBLIC COMMENTS**

Overall public comment is limited to 30 minutes and each speaker is limited to 3 minutes. The President will provide an opportunity for public comment for those in the room and participating remotely. Public comment will also be permitted at the beginning of each agenda item, at the President’s discretion.

**STANDING REPORTS**

- PRESIDENT’S REPORT**
  - Personnel Committee Update ..... LM
- EXECUTIVE DIRECTOR’S REPORT** ..... 32

**NEW BUSINESS**

- GOVERNOR ROUNDTABLE**

**AGENDA ITEMS & UNFINISHED BUSINESS**

**10:30 AM FIRST READING: PROPOSED NEW DEFINITION OF DIVERSITY IN WSBA BYLAWS** DEI Council Member and Chair of Definition of Diversity Workgroup SaNni Lemonidis and DEI Council Co-Chair Raina Wagner.....61

**11:30 AM – RECESS FOR KING COUNTY BAR ASSOCIATION MLK LUNCHEON AND CLOSED BOARD TRAINING**

**SATURDAY, JANUARY 14, 2023**

**9:00 AM – RESUME MEETING**

**CONSENT CALENDAR**

**CONSENT CALENDAR**

A governor may request that an item be removed from the consent calendar without providing a reason and it will be discussed immediately after the consent calendar. The remaining items will be voted on *en bloc*.

- Approve November 5, 2022, Board of Governors meeting minutes..... 72
- Approve Proposed Amendments to Cannabis Law Section Bylaws ..... 77
- Approve Proposed Amendments to Environmental and Land Use Law Section Bylaws ..... 89
- Council on Public Defense Charter Revisions ..... 101
- Approve Client Protection Board Recommendations ..... 106
- Approve Judicial Recommendation Committee Recommendations..... 107
- Approve Judicial Recommendation Committee Review Committee Recommendation

**AGENDA ITEMS & UNFINISHED BUSINESS**

**APPROVE FY23 BOARD PRIORITIES**.....LM

**TRAINING**

**EMAIL SECURITY TRAINING, IT Director Jon Dawson**.....108

**SPECIAL REPORT**

**UPDATE ON THE WASHINGTON STATE BAR LICENSURE TASK FORCE**

**12:00 PM – 1:00 PM – RECESS FOR LUNCH**

**LONG RANGE STRATEGIC PLANNING COUNCIL ITEMS**

- Discuss Proposal to Create Legal Link.....112
- Approve Increase to Facilities Reserve ..... 126

<b>MEETING REVIEW</b>
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**MEETING FEEDBACK**

**3:00 PM – ADJOURN**

**INFORMATION**

- CPE Amended Advisory Opinion 201601..... 130
- Washington State Bar Foundation FY22 Treasurer’s Report..... 139
- Monthly Financial Reports, Unaudited ..... 141
- General Information ..... 243

# ACCESS TO JUSTICE BOARD 2022 ANNUAL REPORT



# CONTENTS

## Access to Justice Board 2022 Annual Report

### Table of Contents

Letter from the Chair ..... 1

Building a Healthier Alliance for Equal Justice. .... 4

The Community Advisory Panel's Vision Grows ..... 6

Inside-Out Approach to Race Equity ..... 9

ATJ Tech Justice Plan Launches. .... 11

Washington Legal Aid Mapping Project Takes Form ..... 13

Breaking Down the Barriers Between Civil and Criminal. .... 15

Undocumented Community Needs Assessment  
Paves the Way to More Resources ..... 17

The Equal Justice Coalition Leads on Public Investments. .... 18

Pro Bono Council Year in Review ..... 20

Rules Committee Overview ..... 24

Leadership ..... 25

#### ACCESS TO JUSTICE BOARD

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Seattle, WA 98101-2539  
Phone: 206-727-8205

<http://AllianceForEqualJustice.org>



Established by the Supreme Court of Washington  
Administered by the Washington State Bar Association

# CHAIR

## Letter from the Chair

Dear Friends,

On behalf of the Access to Justice Board, I am delighted to present the Board's 2022 Annual Report. Last year, we reported the success of the Access to Justice Conference and the inclusion of diverse community voices in the reform of our justice system. The Board promised then not to relent in the pursuit of fairness and the necessary reckoning for the historic injustice of the past.

Our work with the Community Advisory Panel (CAP) and their impact in the formulation of civil legal aid policies and programs has been tremendous. With CAP members we prioritize hearing the voices of those with lived experience of injustice and compensate them fairly for their time. Their contributions to the development of ATJ Board policies such as the ATJ Technology Plan, discussion of court rules and reviewing progress of the Board's priorities has been profound. Other Access to Justice Commissions have reached out to embrace this unique approach to community justice.

In the last year, the ATJ Board and its Delivery System Committee (DSCo) invested a great deal of time and expense in reflection on how we conceive and roll out policies and ideas. The DSCo Strategic Planning subcommittee continues to work to reexamine our structure and funding and led an Alliance-wide assessment to inform potential changes to our guiding documents. The Civil/Criminal Desiloing subcommittee is leading a pathway to action that emphasizes a mutual aid approach to the endemic problem created by the barriers posed by our silo-ed justice systems. The Undocumented Communities subcommittee continues to advocate for increased funding and awareness to serve undocumented communities. They are working with the Office of Civil Legal Aid to develop a pilot project in Yakima and have hired consultants to conduct a needs assessment of the same area. DSCo continues to oversee the Mapping Project, which aims to use data to identify where services are provided across the state and where resources should be targeted to increase services.



**Francis Adewale, Chair  
Access to Justice Board**

# CHAIR

One great impact of our investment in diverse community voices is the success of our recruitment committee in attracting applicants from all geographical corners of our state to serve as members of the Board. More than 50% of applicants were Black, Indigenous, and other people of color. We are welcoming:

- **Jane Smith**, a member of the Confederated Tribes of the Colville Indian Reservation and second-generation tribal judge
- **Vanna Sing**, Southeast Asian from Cambodia and founder of Tacoma Community Healing Awareness (THAC) serving the Southeast Asian communities in the South Sound
- **Carnissa Lucas-Smith**, a King County Public Defender, Black woman, and recent law school graduate
- **Brynn Felix**, General Counsel with Peninsula Community Health Services in Kitsap County

This fulfills our promise at the end of the last conference to include voices of those impacted by our justice system from all over the state in the formulation of statewide civil legal policies. What is more, our new incoming Chair, Terry Price, will be the first openly gay Chair of the Access to Justice Board. The Board's internal equity workgroup is committed to continue efforts to conduct a race equity self-audit to identify practices that impede diverse recruitment and retention of Board members, staff, and volunteers, and develop strategies to eliminate those practices.

The Board commits to promoting systemic and internal race-equity practices, working toward a vision that race or color does not determine the availability and quality of services, fairness of outcomes, or opportunities for communities and individuals. This commitment is epitomized by the numerous reflections done in working and public sessions in the last year. But, by far the most profound reckoning we have done is the examination of the impact of our justice systems on Indigenous communities in our state. The Board and its committees committed to active listening and doing the immersive work to learn how we can better come alongside Indigenous communities in our state in the delivery of civil legal aid. We learned a lot. For instance, we eschewed the performative land acknowledgment at meetings that are not founded on knowledge and reckoning for the injustices of the past and rectification of the



# CHAIR

same. Our work, which is still ongoing, will continue to unearth all forms of injustice and disparities and make the Board accountable to Indigenous communities in our state.

One of the important priorities of the Board in the past year is to support and uplift partnerships among legal aid providers and with justice-involved and community-based organizations. In furtherance of this objective, the Board co-sponsored the online hate and discrimination CLE with Cardozo Society titled “Online Harassment & Cyberstalking: Navigating the New Frontier of Hate Crimes: Implications in Domestic Violence, the First Amendment and Access to Justice.” It also collaborated with WSBA Board of Governors on the Small Towns and Rural Attorneys project to increase representation in rural communities.

Over the next year the Board looks forward to continuing these important actions, including increasing our partnerships with the Community Advisory Panel and other community partners.

Sincerely,



**Francis Adewale**, *Chair*  
Access to Justice Board

# ALLIANCE

## Building a Healthier Alliance for Equal Justice

The Delivery System Committee (DSCo) has been in the process of strategic planning, evaluating the Alliance for Equal Justice's role, purpose, and effectiveness and determining a planning process to update the current State Plan. As part of this process, DSCo reviewed foundational documents that serve as guideposts for the ATJ Board and the Alliance for Equal Justice.

One of the foundational documents are the **Hallmarks** for Equal Justice, which DSCo recognized had not been updated since 2014. Much has happened since then including a racial justice reckoning and movement to actively bring community partners into our collective work. In discussing the need to review and update the Hallmarks, DSCo determined that the process should be informed by community partners and those who have been directly impacted by systemic oppression.

Before engaging in updating the State Plan and Hallmarks, DSCo determined it would be helpful to first engage in a self-assessment of the Alliance. In spring 2022 we deployed the **Healthy Alliance Assessment** tool with the help of **RoadMap Consulting** to survey Alliance members on their perceptions of the leadership, structure, and purpose of the Alliance. The Assessment helped us to identify where we are in the "life cycle" of Alliance so we can chart a course for the future. The survey helped us identify our strengths and challenges.



# ALLIANCE

The Assessment shows that Alliance members recognize that the mission, vision, goals, the State Plan, and strategic planning are areas of strength. Access to justice principles, dedication to equity, strong shared

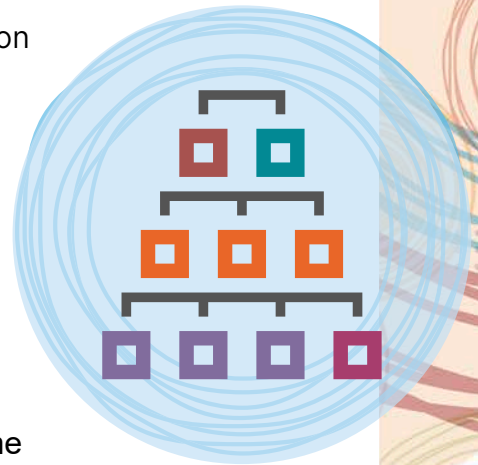
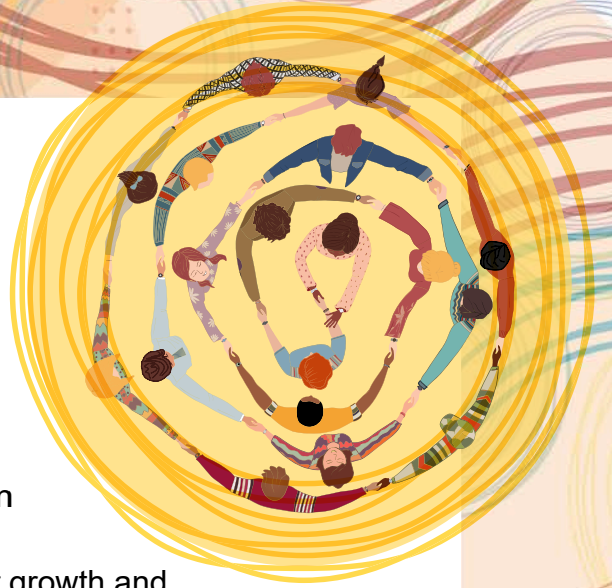
as ethical strongpoints. The strongest elements and capabilities agreed upon by those surveyed were collaboration, connection, and networking. Areas for growth and learning as a network were also uncovered

There was agreement on the need for clarity on organizational roles, structures, recruitment and onboarding strategies, leadership development, and communications between organizations and decision-makers. The Assessment also surfaced those decision-making processes that need clarity and improvement.

Addressing power dynamics and equity were keys point that came up numerous times with smaller organizations who feel they do not have as much of a voice. Engaging community members and those most directly impacted was noted as very important. There was also a consensus that Alliance members need more space to better connect and learn from each other

The Assessment also uncovered a desire to explore the overall purpose of the Alliance, including who the members are and the respective roles in dismantling systems of oppression and direct client legal services.

The strategic planning work continues to inform DSCo in the effort to be collaborative, relevant, and effective in our work and relationship with communities who have been most harmed by systemic oppression. The Assessment provided us with issues to address as we move towards updating the Hallmarks and the State Plan. ■



# CAP

## The Community Advisory Panel's Vision Grows

The first year of the Access to Justice Board's Community Advisory Panel (CAP) was an inspiring, informative, and meaningful step toward actualizing the commitments laid forth in the Board's **2020**

**racial justice call and commitment to action.** The CAP consists of leaders from communities disproportionately impacted by the legal system who are serving as key advisors to the ATJ Board on how to center community voices in decision making.



Practicing the mantra that “change moves at the speed of trust,” CAP has had to endure the pressure and pain points of pursuing change in a culture that is difficult to move.

One CAP participant articulated this understanding, saying:

*“Getting into this, we knew it was going to be hard—getting the legal system to change their thinking and way of doing things”*

The collective commitment and resilience of CAP members to seek systems transformation and true access to justice for all, in the face of resistance and critique, has resulted in greater influence, deeper analysis and truth telling, and supportive funding.

And another in the same conversation offered:

*“There is always a tension between a present and future state. There is no surprise that there is a tension, and the tension arises when there is a significant transformation about to happen.”*

# CAP

## EXPANDING INFLUENCE

Starting in the winter of 2021, the Community Advisory Panel presented at the National Access to Justice Commissions Meeting sharing about the innovative work of CAP, highlighting the essential and nuanced work of centering the voices and building right relationships with those most impacted by systems decisions. The presentation allowed the group to acknowledge our shared learnings, pain points, and promising future. CAP has also played a greater role in providing invaluable input on ATJ Board initiatives, including recruitment to expand community voices on the Board, feedback on the recently adopted ATJ Technology Plan, and input on the Board's progress with its priorities. Additionally, CAP meets regularly to discuss strategies to increase community representation and voices in Alliance for Equal Justice efforts. They recently provided guidance for a community engagement roll-out to break down barriers between the civil and criminal systems and met with the new staff of the Equity and Access to Justice team at the Administrative Office of the Courts.

## Community Advisory Panel Members

- **Jordan Chaney**  
Jordan Chaney Poet, Governor's Task Force on Independent Investigations of Police Use of Force; *Tri-Cities*
- **Andre Dwayne Henderson**  
Civil Survival & Olympic College student, *Kitsap County*
- **Karyn Kameroff, MA, MSW, SWAICL**  
Member of the Choctaw Nation working with the Cowlitz Tribe & Clark County Investigative Response Team for the Use of Deadly Force, *Clark County*
- **Carol Caliyah Mitchell**  
Living and Leading with Soulfulness and Institute for Black Justice, *Pierce County*
- **Marissa Perez**  
Cedar Rising Coalition, *King County*
- **Yonas Seifu**  
Collective Justice NW & small business advocate, *King County*
- **Angel Tomeo Sam**  
Peer Re-entry Navigators & formerly The Bail Project Spokane and Spokane Regional Law & Justice Council Racial Equity Committee, *Spokane*
- **Duaa-Rahemaah Williams**  
Community Member, *Spokane*

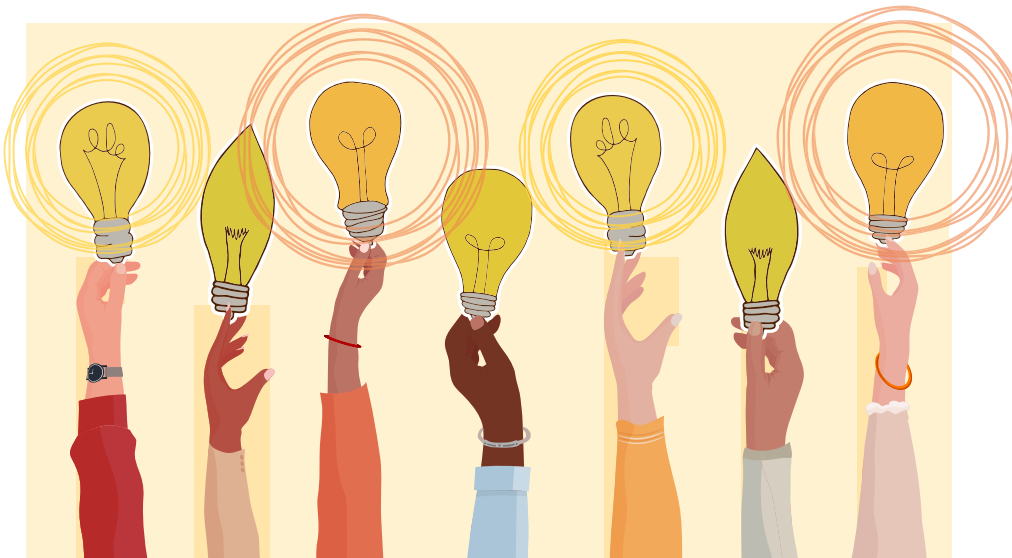
# CAP

## INCREASING SCOPE

Looking to the next two years, we believe that it is time to expand the Community Advisory Panel's scope to promote and model community leadership within the Alliance for Equal Justice and provide broader systemic input. The first two years with the Community Advisory Panel have involved establishing staffing and infrastructure for the panel, building relationships with the Advisors, and learning how best to integrate the Advisors into Board decision-making. However, the vision has always been to establish the Advisory Panel as integral players in the systemic work of the Alliance. This can include but is not limited to:

- Providing strategic insights into policy work, both of the ATJ board and in relationship with other Alliance members.
- Participating as key voices in the development and review of future State Plans.
- Continuing to bring a community perspective to learning spaces such as the Access to Justice Conference and other Alliance-wide forums.
- Taking a leadership role in designing and articulating what it means for Alliance members to become more fully community-centered and anti-racist.

With the generous support of a Legal Foundation of Washington Race Equity Grant, we are embarking on a path forward over the next two years to implement this vision. ■



# RACE EQUITY

## Inside-Out Approach to Race Equity

Particularly since the launch of the current State Plan and the overarching goal of race equity, the ATJ Board has been working to create a more inclusive culture, review and improve our operations with an equity lens, and increase the diversity of perspectives and lived experience on the Board.

In 2021, the ATJ Board continued and strengthened its commitment to race equity by reflecting on how interpersonal, institutional, and structural racism affect access to justice. The Board worked with race equity consultant Kyana Wheeler to continue to learn about race equity on a systemic, organizational, and personal level. The Board is using an equity workbook created by Ms. Wheeler as we continue to deepen our self and other-awareness.

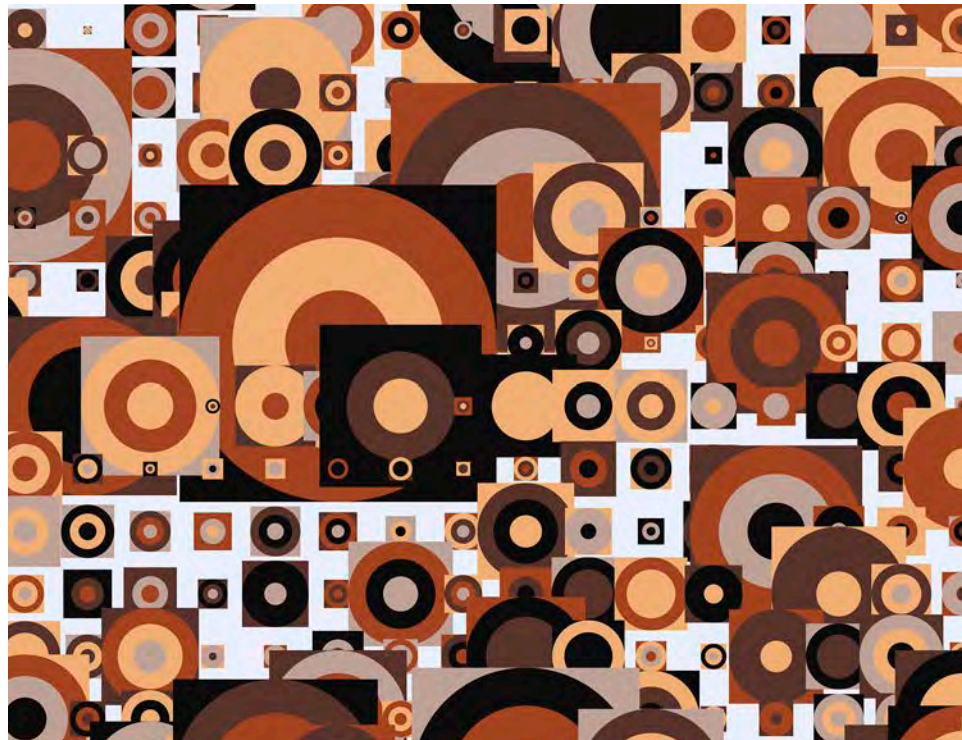


In 2022, the Board engaged equity coaches from JustLead Washington to do an organizational assessment to identify strengths and areas for improvement. JustLead's equity coaches had candid conversations with every Board member and staff and designed an anonymous survey. The assessment showed that the Board's strengths include our collective commitment to race equity, respect for each other and diversity of perspectives. The areas for growth include building trust and a more inclusive space and culture. Another growth area is operationalizing our commitment to take leadership from impacted communities and work in solidarity with those communities in ways that are authentic and effective.

# RACE EQUITY

One way the Board has been working toward walking its talk on diversifying the Board and bringing more community-based leaders to the table was through its work to fill four open member positions. This year, the Board recruited beyond the legal community, seeking candidates through the Community Advisory Panel and other community-based networks. The Board received a record number of applications from the most diverse group of people to date. More than half of the Board applicants were people of color and many applicants had firsthand experience of struggling to access to justice. The Board is excited to welcome the following four new and important voices to the Board:

- **Jane Smith**, a member of the Confederated Tribes of the Colville Indian Reservation and second-generation tribal judge
- **Vanna Sing**, Southeast Asian from Cambodia and founder of Tacoma Community Healing Awareness (THAC) serving the Southeast Asian communities in the South Sound
- **Carnissa Lucas-Smith**, a King County Public Defender, Black woman, and recent law school graduate
- **Brynn Felix**, General Counsel with Peninsula Community Health Services in Kitsap County

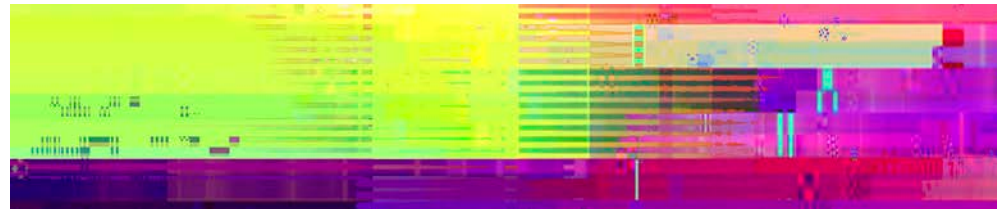




# TECH PLAN

## ATJ Tech Justice Plan Launches

As the COVID-19 pandemic continues, technology remains integral to access to justice particularly for people who experience poverty and represent themselves in court. The ATJ Board's Technology Committee continues to be leaders in our state to push for tech justice innovations and solutions. Over the last year, the ATJ Technology Committee launched the [ATJ Technology Justice Plan](#), which laid out specific projects that it will pursue using the ATJ Technology Principles. The [2020 ATJ Technology Principles](#) were drafted pre-pandemic, and the pandemic has shown just how essential fairness and justice are when implementing new court technology.



With the pandemic, innovations like accelerated implementation of e-filing and remote hearings have the potential to leave some court users behind or even shut out completely. This is particularly true of self-represented litigants. The Technology Justice Plan identifies some of the barriers for these groups. This includes systemic issues like the digital divide as a result of many parts of the state where broadband and signal reception are poor or just unavailable. But there are also court-related difficulties (confusion about court processes, difficulty with fee waivers or legal financial obligation reductions) where technology could assist. The Plan foresees even more robust online data services for litigants to get information like using YouTube videos in several languages rather than written words. Likewise, the Plan foresees the use of technology to pay court fees or legal financial obligations, or automated ways to apply for fee waivers. Additionally, the Plan anticipates greater use of online legal algorithms and websites/apps for people who cannot afford or find legal services. The ATJ Technology Committee has heard from Michael Cherry, chair of the Practice of Law Board (POLB), about the work of the POLB to design a legal regulatory lab sandbox to explore ways to better regulate online legal service providers. While this is a complex area, it is essential that Washington adopt a position that protects vulnerable consumers.

# TECH PLAN

In addition to launching the new Tech Justice Plan, the Committee continues to serve as a place for members to bring their court technology experiences together for sharing and problem-solving. The Committee heard from the Administrative Office of the Court’s new Equity and Access Team about how to better coordinate services. The Committee has also been an informational hub for issues like the data breach with the Odyssey Portal, and how to get that information out to court users. The Committee chairs continue to serve as liaisons to various court technology-related groups like the Superior Court User Work Group, Court of Limited Jurisdiction Court User Work Group, and Judicial Information Systems Committee, which provides some opportunities to learn and share concerns from the perspectives of self-represented litigants and litigants who experience poverty.

Technology concerns, especially user experience issues, continue to proliferate. The ATJ Technology Committee has substantial expertise in this area and will continue to monitor and advise. ■



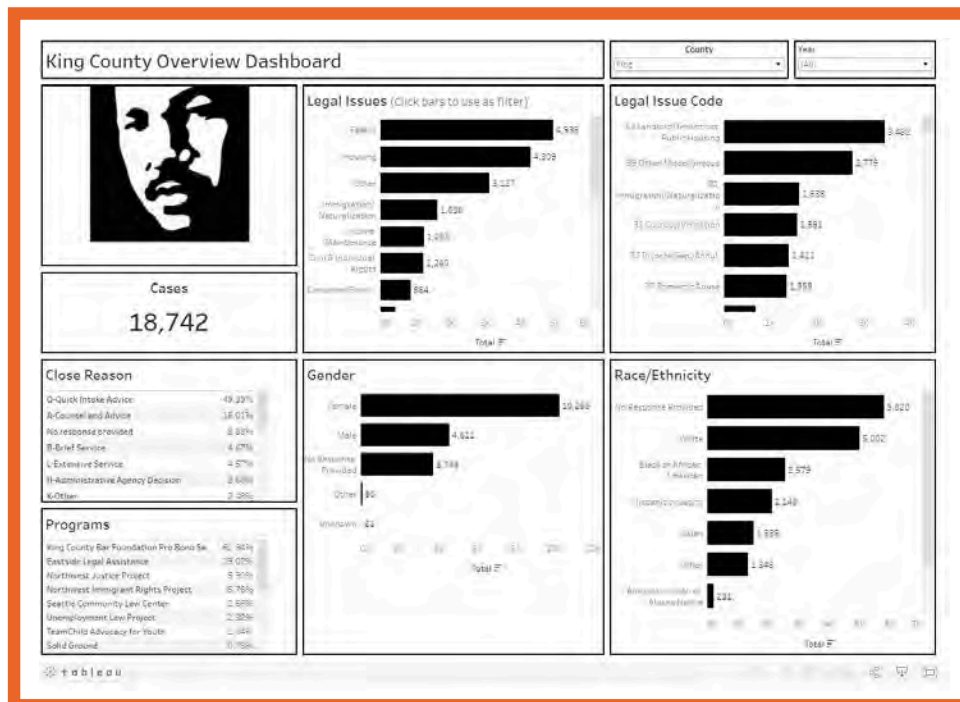
# WaLAMP

## Washington Legal Aid Mapping Project Takes Form

The Washington State Legal Aid Mapping Project (WaLAMP), led by Michael Terasaki, is a project of the ATJ Board’s Delivery Systems Committee that continued its work to survey legal aid providers and services in Washington state. The mapping tool provides two sets of information:

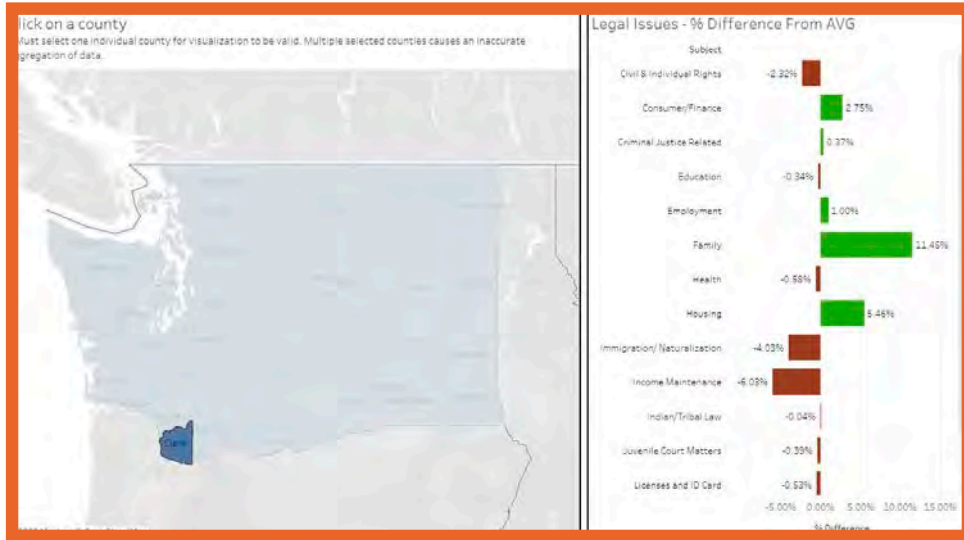
1. Where all types of legal aid providers are located around the state and what services they offer.
2. The demographics and locations of different client-eligible populations, which could be cross-referenced to indicate where services match needs and where there are gaps.

In January, WaLAMP released its first annual report, covering the year 2020 and containing more than 41 pages of data and insights into the legal aid landscape of Washington state. In addition to creating the 2020 report, WaLAMP engaged Scott Gower, a data visualization specialist at Project 3 Consulting, to create a new set of user-friendly and informative maps and tables that incorporate census data. These new maps allow us to see how well specific demographic populations are or are not being served by legal aid programs in Washington.

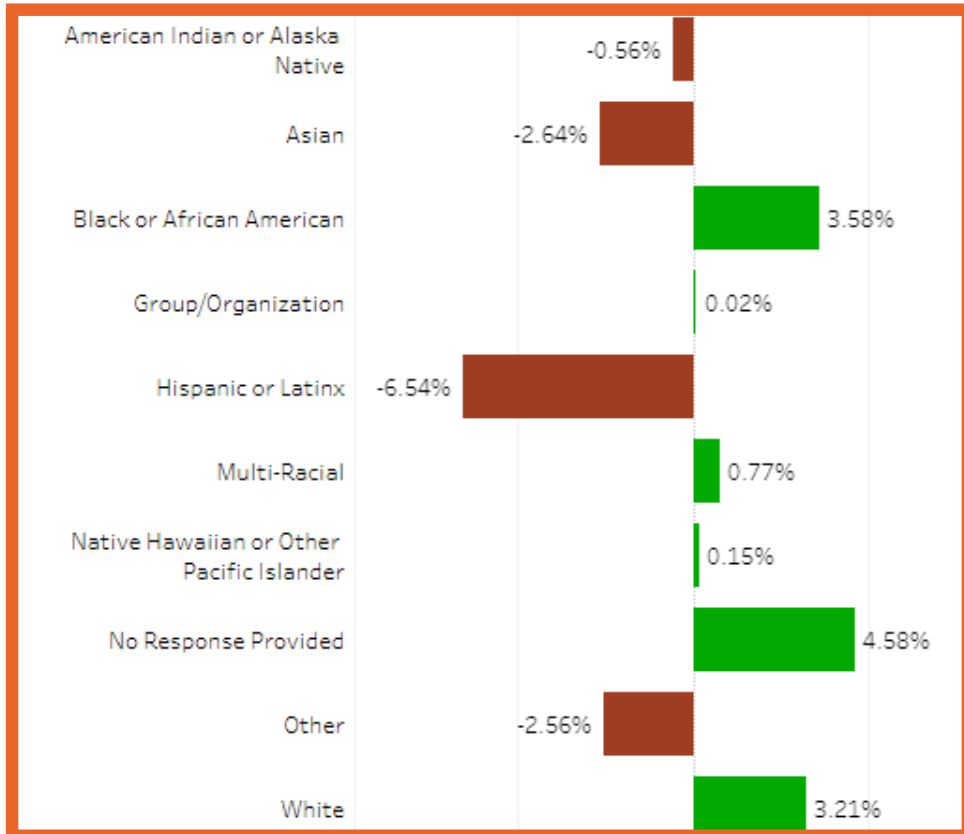


# WaLAMP

Explore the county dashboard [here](#) and the interactive map [here](#).



As a volunteer-driven project, WaLAMP has spent the first half of 2022 collecting the data for the 2021 service year. Once this data is collected, the 2021 service numbers will be added to the WaLAMP maps and tables, likely in Fall of 2022. This data can be used to make informed decisions about where to direct resources and funding.



## DESILOING

## Breaking Down the Barriers Between Civil and Criminal

Advocates in Washington have long recognized that the systems responsible for delivering legal services to those with civil legal needs and criminal legal needs are deeply siloed from one another. The impact of these siloed systems falls heavily and disproportionately on Black, Indigenous, other People of Color and marginalized communities across the state. In Washington, legal services providers do not, largely, practice holistic methods of providing legal services to our clients; however, it is well known that civil legal aid needs impact individuals' criminal cases, and vice versa. Our siloed systems create accessibility issues for the client communities, resulting in the increased likelihood that the legal needs of underserved and underrepresented communities are being left unaddressed.



In 2021, the Delivery System Committee launched a Civil/Criminal Desiloing Subcommittee to explore intentional, well-planned efforts to break down these barriers. The Subcommittee committed time to understanding the attempts to address the problem of siloed systems that have already been explored, what has worked and what needs more intentional solutions. In doing so, the Subcommittee has developed a multi-phase project proposal that prioritizes the following:

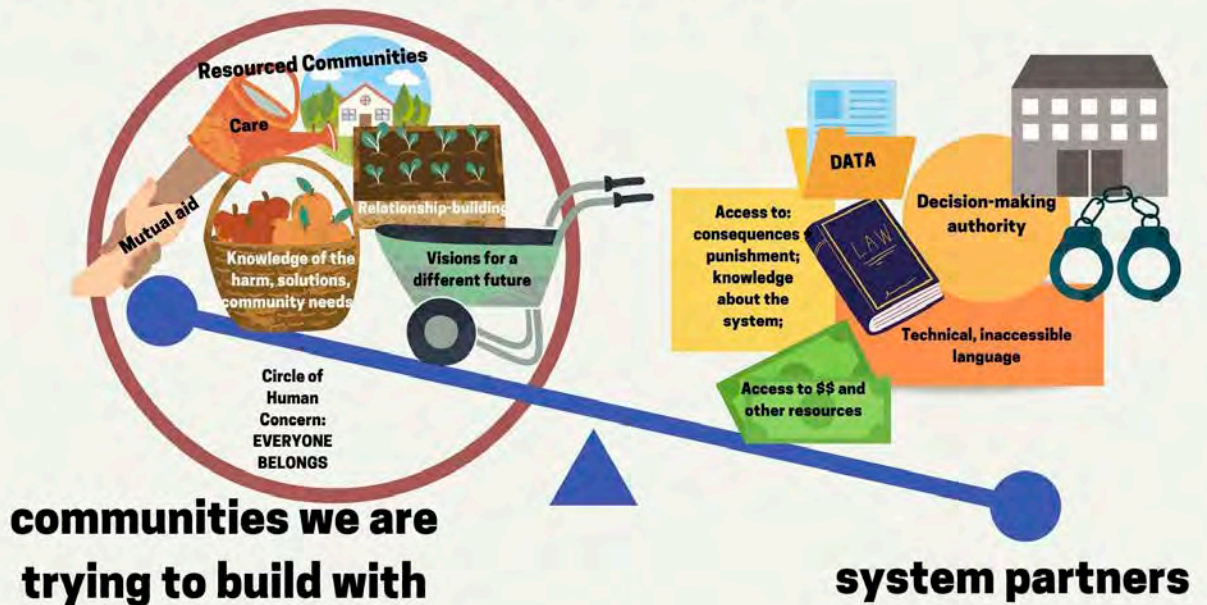
- Using an intersectional lens, acknowledging that to meet the needs of diverse communities we must see the full range of identities and backgrounds and how they interact.
- Leaning into movement lawyering principles, which recognizes that system actors have a wealth of knowledge and skills to navigate the complexities of the legal landscape, but that to truly transform systems and shift power, we need to center, build with, and be accountable to community-led BIPOC movements.

# DESILING

By intentionally engaging with diverse stakeholders who are often left out from sharing perspectives, experiences, and ideas, the equity and justice community will be better able to move towards a more equitable and transformative outcome. The first phase of the plan includes intentional outreach and building relationships with community-based organizations, grassroots/movement-based collectives and organizers, impacted community-members, and other stakeholders. Specific action steps to break down the silos have not been identified yet as we need the critical input from the community to drive solutions. We will also invest in operationalizing the project with staff and other infrastructure to ensure that we are creating the adequate space for this work to thrive. We anticipate this project to last a few years and look forward to providing continual updates on progress.

As we address the barriers to justice that marginalized communities face, we must acknowledge that our legal system as historically hoarded decision-making power. This project to desilo the civil and criminal legal systems instead seeks to shift power back to impacted groups to identify solutions and build thriving communities.

## REBALANCING POWER



Source: JustLead Washington

## UNDOCUMENTED

## Undocumented Community Needs Assessment Paves the Way to More Resources

In August 2020, the ATJ Board adopted the Delivery System Committee's (DSCo) [findings and recommendations on equitable legal aid access for undocumented communities](#). The first portion of findings focuses on the importance of increasing resources dedicated to serving undocumented communities. In 2021, the Committee and others successfully advocated for removing the provision in OCLA's statute that denied access to state-funded legal aid services on the basis of immigration status.

While the restriction was lifted, no money was appropriated to directly serve undocumented people. It is imperative to create mechanisms to ensure that services reach undocumented people by tracking data. We must ensure that funds are allocated to serve this community who continues to be overlooked. Funding is very much central to true access to justice.



To that end, in the summer of 2022, DSCo launched a needs assessment of the undocumented community in Yakima Valley, Washington. The assessment will include demographic and economic data, the availability of legal services, the legal and structural inequities that harm the undocumented community, and recommendations for addressing barriers. This needs assessment will be used to make the case for funding and increased resource during the 2023 legislative session and with other funders. ■

EJC

## The Equal Justice Coalition Leads on Public Investments

The EJC is a committee of the ATJ Board that is managed and funded by LFW.

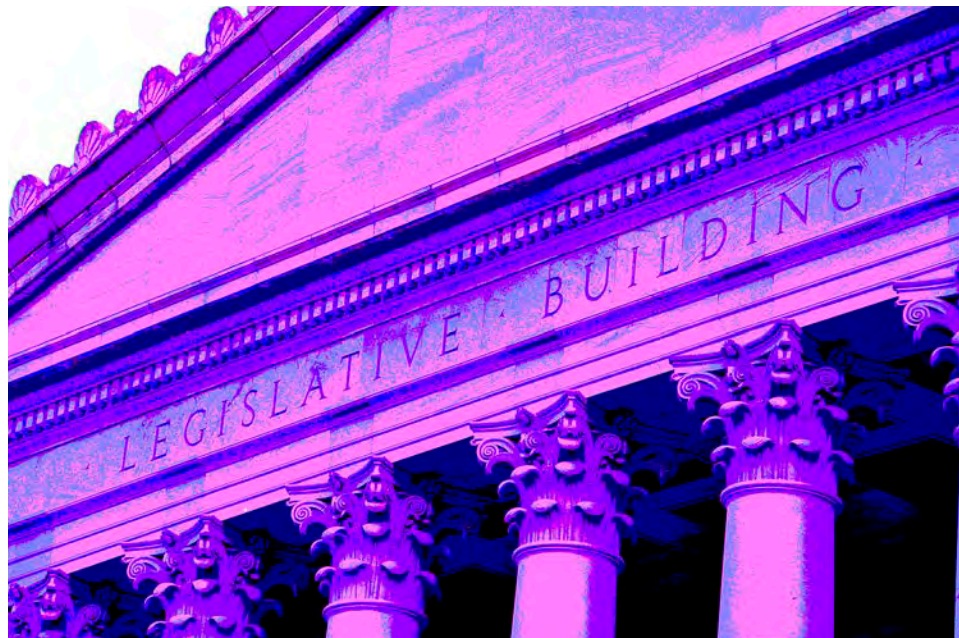
Its purpose is to advocate for public funding for civil legal aid. Staffed by the Legal Foundation of Washington's Communications and Advocacy Director, the EJC works with contract lobbyists as well as elected officials, Alliance for Equal Justice partners, and stakeholders.

**EQUAL  
JUSTICE  
COALITION**

### STATE FUNDING UPDATE

Despite the limited nature of this year's 60-day supplemental session, Washington state legislators responded to significant civil justice needs by approving several key new investments.

The Legislature funded an increase of more than \$8 million for programs through the state Office of Civil Legal Aid, including for legal assistance around eviction prevention, the right to counsel in eviction proceedings, domestic violence, and civil relief related to the State v. Blake decision. Additional new funds for legal services include postconviction and reentry assistance and helping cover a shortfall after a federal cut to the Victims of Crime Act, which serves survivors of domestic violence and others through several legal aid programs and community organizations in Washington.





## FEDERAL FUNDING

The EJC's traditional spring effort in support of maintaining and expanding federal Legal Services Corporation (LSC) funding did not take place in 2022 as LFW underwent a transition and Alexandra Deas assumed the Communications and Advocacy Director position at the beginning of June. Instead, César Torres, Executive Director of the Northwest Justice Project (the sole state recipient of LSC funding) will travel to D.C. in mid-September 2022 and meet with members of the Congressional delegation in conjunction with an LSC conference.

The EJC's 2021 report noted good prospects for the first significant LSC increase in many years after the House of Representatives followed President Biden's lead and approved a historic \$600 million LSC funding level (a 29% increase). However, the President's FFY-2022 Build Back Better budget blueprint faced severe headwinds, with final action delayed for 6 months (until March 2022, almost a month after the start of the war in Ukraine). In a highly unusual result, the final budget mark for LSC—\$489 million—fell even below the Senate budget approved amount of \$525 million (a 10% increase). This funding level fell far short of even conservative projections, resulting in NJP experiencing a significant federal funding shortfall.

For FFY-2023 the House of Representatives has approved \$675 million for LSC (President Biden's budget requested \$700 million). This is the largest amount ever included in a congressional appropriations bill for legal services. The Senate is on track to approve \$539 million (a 10% increase). Despite continued Congressional bipartisan support for LSC, and among the Washington delegation in particular, the prospects of even worse dysfunction surrounding the upcoming elections makes it impossible to predict an orderly adoption of FFY-2023 spending bills, much less to hazard any projections as the final budget mark for LSC. ■



# PRO BONO

## Pro Bono Council Year in Review

The mission of the Statewide Pro Bono Council is to further access to justice by supporting and advocating on behalf of the Volunteer Lawyer Programs (VLPs) in Washington state. Major efforts of the last year focused around bringing services back for in-person meetings, hearings, clinics, and events.

### RETURN OF IN-PERSON SERVICES

Volunteer lawyer programs across the state spent the last year juggling a return to (new) normal with the realities of a legal system forever changed by COVID-19. Responding to client needs, VLPs reopened their doors at least part-time and restarted many of the in-person legal clinics and consultations that existed back in 2020.

While increased use of courtroom technology, like Zoom or remote hearings, continues to allow many clients to participate in their own cases more easily, those without access to fast internet or technology benefitted from a return to in-person options for hearings and appointments. Volunteer Lawyer Programs, as lean and nimble organizations, were able to provide support for clients in both situations. For example, Skagit Legal Aid revived the annual in-person “Skagit Law Day Clinic” for in-person advice, and most VLPs now offer a safe, private “Zoom room” space for clients without technology access to use during virtual hearings and consultations.

### INCREASED INVESTMENT IN NATIVE COMMUNITIES

Pro Bono Council and volunteer lawyer programs spent the last year renewing our commitments to serve native communities and fostering relationships with tribal governments and organizations. Some programs, like Cowlitz-Wahkiakum Legal Aid, increased dedicated staffing for outreach and support of Native Community neighbors. Some programs expanded partnerships with local Tribal courts, like Skagit Legal Aid who hosted a Swinomish Tribal Court CLE event that culminated in the swearing-in of more than 25 new Swinomish Tribal Bar members.



“CWLA’s amazing staff is connecting and learning more about serving the everyday civil legal needs of tribal members with a legal clinic offered regularly at the Administrative Offices of the Cowlitz Tribe. Funding for our general operation is supporting this focused, culturally sensitive work and allows us to offer this program led by staff from the native community.”

**Lori Bashor-Sarancik,  
Executive Director of  
Cowlitz Wahkiakum Legal Aid**

# PRO BONO

## RECOGNITION FOR (A LIFETIME OF) GOOD WORK DONE!

This year, longtime PBC Member and volunteer lawyer program board member Gail Smith received the WSBA APEX Lifetime Service Award. This special award is given for a lifetime of service to the legal community and the public. Gail has served on the board of LAW Advocates in Whatcom County, and on the board of Skagit Legal Aid. He is also an inaugural member of the Washington Pro Bono Council. Congratulations, Gail!

## DEMENTIA ADVANCED LEGAL PLANNING

This year, the Pro Bono Council launched a new, statewide program to provide free legal assistance to those in need of advanced legal planning documents to plan for the progression of dementia. In partnership with the Washington Dementia Action Collaborative and DSHS, Pro Bono Council staffing increased to operate the new program. Now anyone over the age of 60, anyone with a family history of dementia, or anyone living with dementia of any age can obtain free legal support for dementia legal planning (power of attorney and advanced directive documents). ■

## SERVICE NUMBERS

<b>40,131 hours</b>	attorney services provided to low-income clients, including thousands of staff attorney hours through the state eviction “right to counsel” program
<b>15,382 clients</b>	received no cost legal services
<b>17,910 hours</b>	in volunteer attorney work provided
<b>2,722 clients</b>	received direct representation (500 more than last year!)

# PRO BONO



Swinomish Attorneys, Skagit Legal Aid Director, and representative of the National Native American Law Students Association at a well-attended Tribal Law CLE that concluded with the swearing in of more than 25 new Swinomish Tribal Bar members.

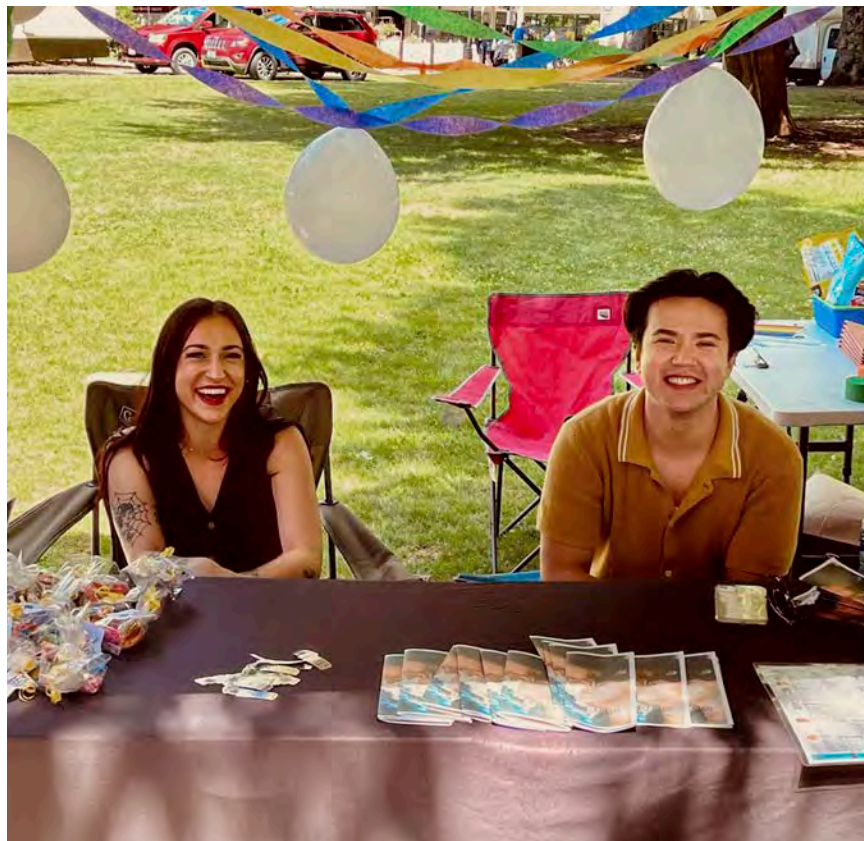


Cowlitz Wahkiakum Legal Aid director Lori Bashor-Sarancik and PBC Manager Michael Terasaki present at a well-attended community education event about guardianships, conservatorships, and dementia advanced legal planning.

# PRO BONO



ELAP staff attorney Dorothy Leggett, Health Center Business Director at Healthpoint's Midway Clinic, Magdalena (Magda) Herrera de Leonis, and ATJ Board Member Esperanza Borboa at the 2022 "Breakfast for Justice" in Bellevue, Washington.



Clark County Volunteer Lawyers Program Volunteer Manager Mia Demay and Survivor Support Program Manager Colin Newton table at the "Pride in the Park" event in Vancouver, Washington.

# RULES

## Rules Committee Overview

In 2022, the Access to Justice Board Rules Committee continued to thoroughly consider and provide input concerning court rules that potentially create and reduce barriers to accessing the civil and foster care legal systems. For example, the Board wrote in support of amendments to Code of Judicial Conduct Rules 2.2 and 2.6, designed to assist judicial officers in better understanding how they can work with unrepresented litigants. Relatedly, the Rules Committee once again wrote in support of General Rule 40, relating to informal family law trials, emphasizing that the findings of the 2015 Civil Legal Needs Study Update concerning the pressing needs of unrepresented family law litigants support doing more to serve litigants in that area of law.

Also in judicial ethics, the Board wrote in support of amending Code of Judicial Conduct Rule 2.3, making express the requirement that judicial officers not mistreat individuals on account of their gender identity and gender expression.

Significantly, the Rules Committee wrote a lengthy comment expressing the Board's views on proposed amendments to Civil Rule 39 relating to remote trial proceedings and proposed new General Rule 41 relating to remote jury selection. While neither supporting nor opposing the proposed amendments and new rule, the Rules Committee urged consideration of the potential impact of the rules on historically marginalized communities, along with several other important access considerations. ■



# LEADERSHIP

## 2021-2022 ATJ Board Members

Francis Adewale, *Chair*

Esperanza Borboa

Michael Chin

Hon. Frederick P. Corbit

Hon. David S. Keenan

Lindy Laurence

Michelle Lucas

Salvador A. Mungia

Mirya Muñoz-Roach

Terry J. Price, *Chair-Elect*

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## STAFF

Diana Singleton

*Chief Equity and Justice Officer*

Bonnie M. Sterken

*Equity and Justice Specialist*

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## ACKNOWLEDGEMENTS

The Access to Justice Board would not be able to accomplish its work without the dedication and support of its many committee volunteers. The Board is grateful to the support and guidance of its standing committees over the past year.

## COMMITTEES AND CHAIRS

### **Access to Justice Conference Planning Committee:**

Jenae Ball and Esperanza Borboa

### **Delivery System Committee:**

Michael Terasaki, Francis Adewale and Esperanza Borboa

### **Equal Justice Coalition:**

Kara Masters

### **Pro Bono Council:**

Eloise Barshes and Elizabeth Fitzgearld

### **Rules Committee:**

Hon. David Keenan and Chris Durban

### **Technology Committee:**

Terry Price and Stephen Seely

**TO:** WSBA Board of Governors  
**FROM:** Executive Director Terra Nevitt  
**DATE:** January 4, 2023  
**RE:** Executive Director’s Report

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2023 Licensing Update

This year marks a licensing milestone: we’re paperless! As you know, we made this change to improve efficiency in how we serve our members and to decrease our environmental footprint. A total of 42,026 licensed legal professionals are due to renew this year and about a quarter of them have already done so. As a reminder, license renewal must be completed by February 1. For more information, visit our license renewal page at [www.wsba.org/licensing](http://www.wsba.org/licensing).

FY22 Financial Audit

Each year WSBA undergoes a financial audit performed by an outside CPA firm selected by the Board of Governors. The audit typically occurs two months after the close of the fiscal year (September 30<sup>th</sup>) and results are reported to the Budget and Audit Committee in January. Our auditors, Clark Nuber, performed fieldwork for WSBA’s audit the week of December 5<sup>th</sup> and are currently in the final stages of internal review of the audit work performed. To date there have not been any recommendations for adjustments or concerns identified by the auditors. The Budget and Audit Committee will receive the final results of the audit and draft FY 2022 audited financial statements at their January 27, 2023, meeting. If agreed upon, the Committee will make a recommendation for the Board of Governors to approve the audit results and financial statements at the March 3-4, 2023, meeting.

FY22 Budget vs. Actual Information

The WSBA fiscal year closed on September 30, 2022, with a budget surplus of \$1,641,094, which was favorable to the reforested budget by \$1,405,940. While in many ways this is a positive result, it is important to understand the reasons that we performed differently than expected as we strive to develop budgets that are as accurate as possible. Attached, is additional detail about FY22 budget to actual variances.

WSBA Employee Retention Data

In 2022, WSBA had a turnover rate of 14%, which is slightly higher than the last two years, but still trending below the national average of 18% for 2022, and below WSBA’s average turnover rate of 15% over the last 6 years. Here are WSBA’s turnover rates for 2017-2022:

2022	14%	2019	20%
2021	11%	2018	15%
2020	12%	2017	17%



Retirements are typically not counted in attrition because companies focus on what is preventable. If we do not count the three retirements in 2022, WSBA's turnover rate for 2022 is just 11%. The WA State Office of Financial Management's turnover rate for 2022 is 15.7%. Not counting retirements, this figure is lowered to 13%. Also this year, organizations in the US saw a turnover of 40% for employees with approximately 1 year of service. WSBA's turnover rate in this category is 22%, largely due to involuntary separations for probationary employees and employees who relocated outside of state.

Of the employees who stated reasons for their voluntary departure, most of them cited compensation as their primary reason for leaving. A few sought opportunities in different industries to align with their personal career goals and three employees moved out to state to be with family. Of the employees who departed WSBA in 2022, two returned to work at WSBA as temporary employees.

WSBA continues to analyze internal and external trends to make data-driven decisions that impact recruitment and retention.

#### Bar News Revenue Positive

We marked a significant milestone as we closed the books on FY 2022: For the first time in at least a decade (and almost certainly longer), the *Washington State Bar News* cost center—with both direct and indirect costs—ended in the positive (netting the general fund about \$6,000). This was done through deliberate and persistent effort; we changed to a much higher-performing ad rep, adjusted paper products in the face of escalating costs, built an in-house web platform with online ad space, and more. A few important messages for members: Because *every* member receives the magazine, it is an enticing advertising opportunity, and because of our ads and careful management of the magazine, we are now making money for the organization by producing the magazine. Yay!

#### WSBA Entities Annual Report

The 2021-2022 WSBA Entity Annual Reports are enclosed with this report along with some volunteer engagement data regarding applicant and volunteer data points and trends.

#### Attachments

FY22 Budget vs. Actual Variances  
Entity Annual Reports  
Litigation Report  
Media Report  
Member Demographics Report

# WASHINGTON STATE BAR ASSOCIATION

To: Board of Governors

From: Tiffany Lynch, Director of Finance

Subject: FY 2022 Budget to Actual Variances

Date: December 21, 2022

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## **GENERAL FUND**

As part of the year-end review of WSBA financials, we have provided the attached itemized list of General Fund budget variances. The WSBA General Fund assumed a reforecast budget surplus of \$235,154 for FY 2022. The actual results reflect a surplus of \$1,641,094, which is \$1,405,940 more than budgeted. Below is a narrative which highlights the major variances and background surrounding the year-end results.

## **REVENUE**

Total revenue is over budget by 2.3% (\$503,315) mainly resulting from the following:

- a. *Licensing Fees* are over budget by \$345,797 (2.1%). The bulk of fees are collected in January and pro-rated on a monthly basis. Based on the amounts collected during the licensing renewal season (December to February), we anticipated that this revenue would come in over budget resulting from late fees.
- b. *Interest Income* is over budget by \$99,958 (1,937.2%), which is a result of changing market conditions throughout the fiscal year. Earlier in the year, interest rates on short term investments were very low but rose significantly in the second half of the year, resulting in more income than anticipated.
- c. *Mandatory CLE revenue (aggregate)* is over budget by \$81,543 (5.9%) from higher than expected accredited program fees and member late fees.

## **EXPENSES**

Total expenses are under budget by 4.4% (\$902,625), mainly resulting from the following:

- a. *Direct Expenses* are under budget by 22.9% (\$575,072) which was significantly lower anticipated. Direct expenses typically consist of direct program costs such as board/council/taskforce meetings, event expenses, supplies, staff travel, etc. and have been most affected by the continuation of COVID-19 in FY22. While the reforecast budgets attempted to plan for expenses related to more in-person work, actual activities varied greatly and resulted in substantial savings.
- b. *Indirect Expenses* are under budget by 1.7% (\$327,553).
  - i. Salaries, Taxes, & Benefits had a combined savings of \$97,608. The largest amount of savings is attributed to salaries from unfilled positions; however, this was offset by

- higher than budgeted expenses for employer taxes and medical insurance.
- ii. Other Indirect Expenses had a combined savings of \$229,946 mainly due to lower legal fees and IT direct expenses for consulting services, training, computer software, and training.

### **CONTINUING LEGAL EDUCATION (CLE)**

The CLE fund includes CLE Seminars, CLE Products, and Deskbook cost centers which collectively assumed a reforecast budget surplus of \$656,575 for FY 2022. The actual results reflect a surplus of \$393,257, which is \$263,318 less than budgeted. CLE revenues are under budget by 19% (\$418,532) from lower seminar registrations and deskbook sales, and CLE direct expenses are under budget by 47% (\$169,048) mainly due to an incorrect reforecast of section seminar splits of \$115,000. This amount should have been budgeted as a reduction in revenue as required by our independent auditors. Actual seminar splits are recorded correctly. Indirect expenses had a minimal variance from budget with slightly higher than budgeted salaries and savings from other indirect expenses for reasons described under the General Fund.

### **CLIENT PROTECTION FUND (CPF)**

The Client Protection Fund (CPF) assumed a reforecast budget surplus of \$157,238 for FY 2022. The actual results reflect a surplus of \$17,256 which is \$139,983 less than anticipated. CPF revenues are under budget by 9.5% (\$79,092), mainly from lower member assessment revenue. Total CPF direct expenses are over budget by 13% (\$65,715), the majority of which is related to Gifts to Injured Clients which are hard to predict and depend on the number of claims and amounts awarded to individuals by the CPF Board and Board of Governors. Indirect expenses are slightly under budget at 2.9% (\$4,824), with the majority resulting from savings in other indirect expenses for reasons described under the General Fund.

### **SECTIONS FUND**

The Sections Operations cost center represents the collective total of financial activity for all 29 sections. Sections assumed a budgeted loss of (\$262,000) for FY 2022. The actual results reflect a surplus of \$293,807, which is a variance of \$555,806 resulting from higher revenue from CLE seminars (\$147,090) and interest income (\$10,025), and lower direct expenses for Section programming (\$417,770). Similar to the General Fund direct expenses, Section direct expenses were impacted by the continuation of COVID-19 in FY 2022.

**WSBA**  
**Significant Variances in Budget to Actual Revenue and Expenses**  
**General Fund- FY 2022**

<b>FY22 Budgeted Surplus</b>	<b>\$ 235,154</b>
<b>FY 22 Actual Surplus</b>	<b>\$ 1,641,094</b>

<i>Revenue: Over or (Under) Projected Amounts</i>	<i>Budget</i>	<i>Actual</i>	<i>Dollar Difference</i>	<i>Percentage Difference</i>
License Fees	\$ 16,512,089	\$ 16,857,886	\$ 345,797	2.1%
Interest Income	\$ 5,160	\$ 105,118	\$ 99,958	1937.2%
Mandatory CLE revenue (aggregate)	\$ 1,382,807	\$ 1,464,350	\$ 81,543	5.9%
<i>Bar News</i> (aggregate)	\$ 621,700	\$ 661,041	\$ 39,341	6.3%
Pro Hac Vice	\$ 362,311	\$ 400,282	\$ 37,971	10.5%
Royalties (Practice Management Assistance)	\$ 40,226	\$ 62,097	\$ 21,871	54.4%
New Member Education (aggregate)	\$ 91,500	\$ 45,915	\$ (45,585)	-49.8%
Bar Exam Fees	\$ 1,212,376	\$ 1,137,525	\$ (74,851)	-6.2%
Other line-item variances	\$ 1,303,751	\$ 1,301,021	\$ (2,730)	-0.2%
<b>Net surplus revenue</b>			<b>\$ 503,315</b>	

<i>Indirect Expenses: Over or (Under) Projected Amounts</i>	<i>Budget</i>	<i>Actual</i>	<i>Difference</i>	<i>Percentage Difference</i>
Salaries	\$ 12,288,579	\$ 12,068,832	\$ (219,747)	-1.79%
Benefits (retirement)	\$ 1,233,481	\$ 1,203,504	\$ (29,977)	-2.43%
Benefits (misc/other)	\$ 54,373	\$ 57,623	\$ 3,250	5.98%
Benefits (medical)	\$ 1,603,294	\$ 1,652,191	\$ 48,897	3.05%
Benefits (taxes & insurance)	\$ 942,569	\$ 1,074,442	\$ 131,873	13.99%
Net savings from salaries and benefits (all funds)			\$ (65,704)	
Other indirect expense (Professional Fees- Legal)	\$ 250,000	\$ 135,866	\$ (114,134)	-45.65%
Other indirect expenses (Computer Pooled Expense)	\$ 942,450	\$ 852,470	\$ (89,980)	-9.55%
Other indirect expenses (Rent)	\$ 2,029,301	\$ 2,001,901	\$ (27,400)	-1.35%
Other indirect expenses (Human Resources Pooled Expense)	\$ 99,058	\$ 75,425	\$ (23,633)	-23.86%
Other line-item variances in other Indirect Expenses	\$ 715,742	\$ 718,051	\$ 2,309	0.32%
Net overage from other indirect expenses (all funds)			\$ (252,838)	
Plus CLE & CPF fund variances	\$ 1,372,853	\$ 1,381,864	\$ (9,011)	
<b>Total net savings in indirect expenses</b>			<b>\$ (327,553)</b>	

<i>Direct Expenses: Over or (Under) Projected Amounts</i>	<i>Budget</i>	<i>Actual</i>	<i>Difference</i>	<i>Percentage Difference</i>
Consulting Services & Surveys (Diversity)	\$ 121,275	\$ 30,722	\$ (90,553)	-74.67%
Printing, Copying & Mailing ( <i>Bar News</i> )	\$ 260,000	\$ 205,953	\$ (54,047)	-20.79%
Admissions- Bar Exam costs (aggregate)	\$ 388,157	\$ 342,952	\$ (45,205)	-11.65%
Hearing Officer Expenses (Disciplinary Board)	\$ 34,461	\$ 2,763	\$ (31,698)	-91.98%
Litigation & Staff Conferences/Training (Discipline)	\$ 63,972	\$ 32,429	\$ (31,543)	-49.31%
Character & Fitness Board (aggregate)	\$ 25,000	\$ 3,379	\$ (21,621)	-86.48%
Leadership Training (Office of the Executive Director)	\$ 20,000	-	\$ (20,000)	-100.00%
Board Expense & Reception/Forums (ATJ Board)	\$ 33,500	\$ 13,656	\$ (19,844)	-59.24%
Member Services & Engagement (aggregate)	\$ 23,250	\$ 6,265	\$ (16,985)	-73.05%
Other line-item variances	\$ 1,541,157	\$ 1,297,581	\$ (243,576)	-15.80%
<b>Total net savings in direct expenses</b>			<b>\$ (575,072)</b>	

**Total increase in budgeted surplus**      **\$ 1,405,940**

# WASHINGTON STATE BAR ASSOCIATION

**TO:** WSBA Board of Governors  
**FROM:** Paris Eriksen, Volunteer Engagement Advisor  
**DATE:** December 29, 2022  
**RE:** Volunteer Engagement Report and WSBA Committee and Board Annual Reports for 2021-2022 (FY22)

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## Volunteer Engagement Report

The organization continues to develop various pathways toward strengthening our volunteer community including, but not limited to, **enhanced recruitment efforts**, new and **additional methods of recognition** such as celebrating National Volunteer Week in April, and **supporting existing volunteers** through continued professional development training for staff liaisons regarding volunteer engagement and providing a CLE accredited orientation opportunity for committee, boards and section executive committee chairs. Additionally, WSBA continues to evaluate our current practices and develop metrics to better understand trends within the volunteer community and applicant pool.

To summarize:

- The 2022 application cycle (for terms beginning October, 1, 2022 – FY23) saw an **overall increase** in the number of volunteer applications received, for boards, committees *and* section executive committees. The overall increase did not, however, meet the need of the appx. 345 positions we need to fill.
- The total number of current volunteers serving on an entity (including section executive committees) has **decreased**. Even with the increase in applications, positions remain vacant and past volunteers are not returning.
- The WSBA volunteer community continues to include a **larger percentage of underrepresented groups** than the WSBA membership.
- From 2021 to 2022, **13 committees/boards had an increase in their volunteer applicant pool** and 10 experienced a decrease in their applicant pool. Four entities experienced the same applicant pool as last year.
- To date, the **WSBA is still seeking applications for 51 open committee/board positions and 35 open section executive committee positions**. Every effort is being made to match a current applicant with an open vacancy and to seek additional applicants if the current pool is insufficient.

Following this memo is a one-page data 'Info Sheet' illustrating a series of data points and trends regarding WSBA's volunteer engagement.

## 2021-2022 (FY22) Committees & Board Annual Reports

As required by the WSBA Bylaws Article IX.3(b), 'Each Bar entity must submit an annual report to the Executive Director and submit such other reports as requested by the BOG or Executive Director.' The information contained



in the reports was submitted by the respective chair and/or staff liaison. Financial information was provided by the Finance and Administration Department and demographic information was compiled using the optional information self-reported by volunteer during the online application process.

As a reminder, Supreme Court Boards (Access to Justice Board, Disciplinary Board, LLLT Board, Limited Practice Board, MCLE Board and Practice of Law Board) provide annual reports to WSBA to support its responsibility under GR 12.3, to provide oversight and monitor compliance with applicable rules and orders. Boards have the option to use the WSBA template or to share their annual reports to the Washington Supreme Court. Some such Board reports are included with supplemental demographic information provided. Other such Board reports will be submitted at another time.

The annual reports included following this cover memo are:

Access to Justice Board	Judicial Recommendation Committee
Board of Bar Examiners	Law Clerk Board
Character and Fitness Board	Legislative Review Committee
Continuing Legal Education Committee	Limited License Legal Technician Board
Council on Public Defense	Limited Practice Board
Court Rules and Procedures Committee	Mandatory Continuing Legal Education Board
Committee on Professional Ethics	Member Engagement Council
Disciplinary Advisory Round Table	Practice of Law Board
Disciplinary Board	Pro Bono and Public Service Committee
Diversity, Equity and Inclusion Council	Small Town and Rural Committee
Editorial Advisory Committee	Washington Young Lawyers Committee

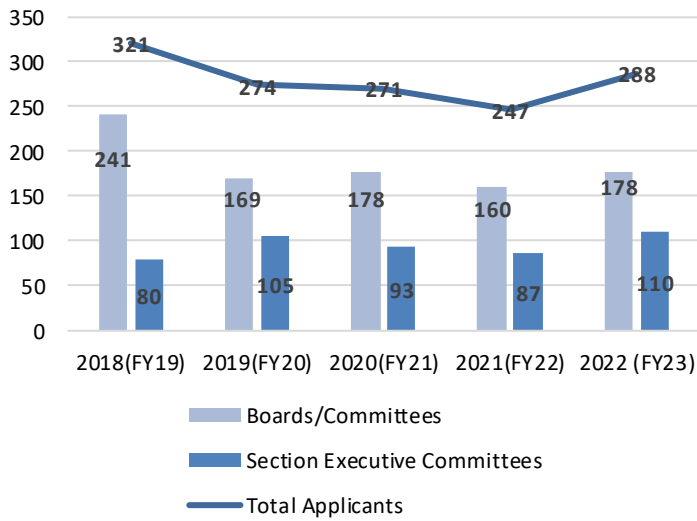
Adjunct Disciplinary Counsel Panel, Disciplinary Selection Panel and Hearing Officer Panel do not provide annual reports.

Attachments:

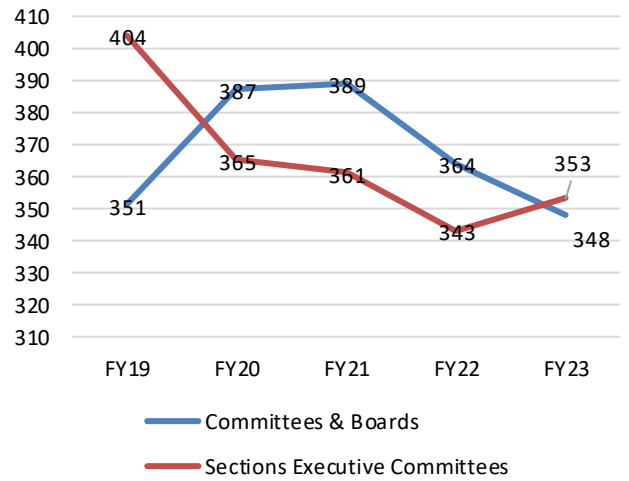
Volunteer Engagement Trend Info Sheet

2021-2022 Entity Annual Reports (does not include Section Executive Committees)

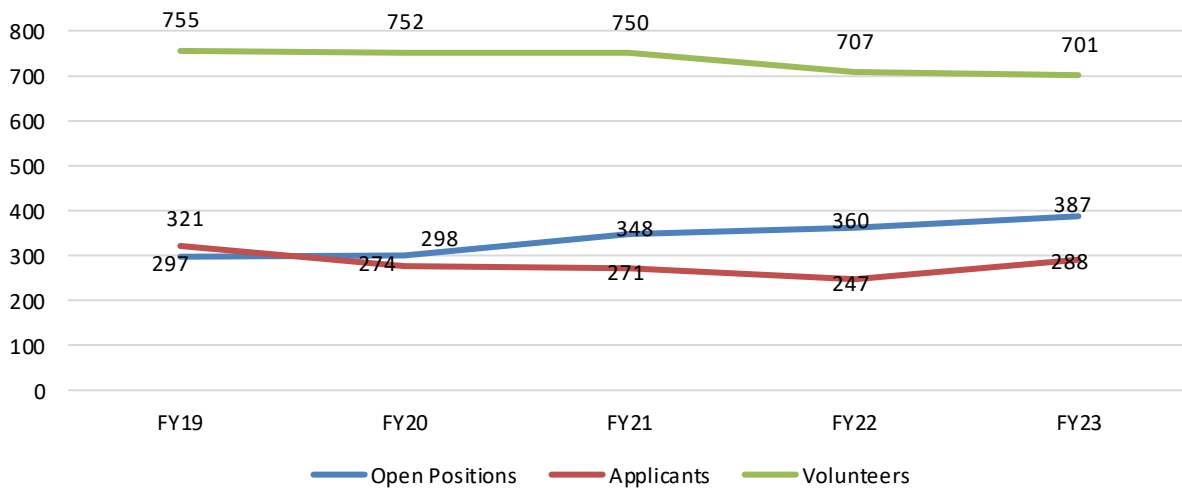
### Applicant Pool



### Volunteers

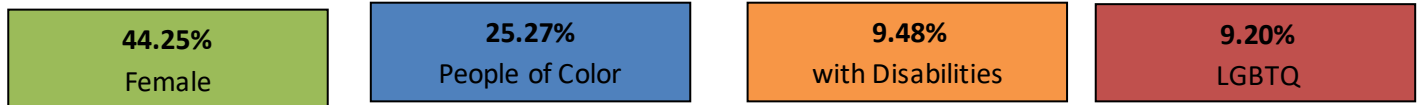


### Open Positions, Applicants, Volunteers

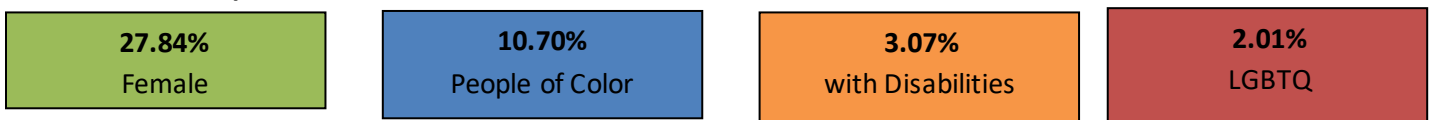


### Underrepresented Groups | Demographic Information

#### WSBA Volunteers\*



#### WSBA Membership\*\*



\*Does NOT include section executive committee or project-based volunteers such as CLE faculty)

\*\* December 1, 2022 WSBA Membership Data Report



# PRACTICE *of* LAW BOARD

## Annual Report for the Supreme Court Fiscal Year 2022

Oct. 1, 2021, to Sept. 30, 2022

Michael Cherry  
Chair, Washington Supreme Court Practice of Law Board



## 1.0 Executive Summary

Fiscal Year 2022, which ran from Oct. 1, 2021, to Sept. 30, 2022, was a year of action for the Practice of Law Board (Board). The Board delivered on each of the Board's areas of responsibility under General Rule 25: Practice of Law Board (GR 25).

Accomplishments include:

**Education:** The Board co-published with the Washington State Bar Association (WSBA) a first edition of a Legal Checkup. This first edition focuses on helping a person find competent legal assistance from an authorized legal services provider and guidance on preparing for a first meeting. This will help people both find competent legal assistance and reduce incidents of unlawful practice of law. The board also worked towards getting an online version of this edition available as a chatbot.

**Innovation:** The Board worked to refine its blueprint for the Court on data-driven legal regulatory reform, which would be implemented via legal regulatory lab processes. Significant work was done on researching the Court's authority to create and operate such legal regulatory lab processes and building financial models to determine costs and revenues. If approved by the Court, data driven legal regulatory reform will expand the availability of competent legal services in Washington.

**Coordination:** The Board met with prosecutors from a variety of Washington State counties, as well as representatives of the Attorney General's Office, to better understand the threshold for prosecuting unauthorized practice of law (UPL) complaints. With a better understanding of how UPL complaints should move through the process, the Board can work to ensure more complaints are actionable.

The Board continues to work toward being a diverse and inclusive Board that represents the people of Washington state.

Respectfully submitted,

/s/Michael Cherry

Michael Cherry (WSBA # 48132)

Chair, Practice of Law Board

November 11, 2022

## 2.0 Introduction

The Washington Supreme Court's Practice of Law Board (Board), with the administrative assistance of the Washington State Bar Association (WSBA), is submitting this report to the Washington Supreme Court, WSBA President Dan Clark, the WSBA Board of Governors, and Executive Director Terra Nevitt, as the Board's fiscal year 2022 report. Under General Rule 25: Practice of Law Board (GR 25),<sup>1</sup> the Board is responsible for: educating the public about how to receive competent legal assistance (educate); considering and recommending to the Supreme Court new avenues for persons not currently authorized to practice law to provide legal- and law-related services (innovate); and receiving complaints alleging the unauthorized practice of law (UPL) in Washington by any person or entity and referring such complaints to the appropriate agency for subsequent action (coordinate).

This report follows the WSBA fiscal year,<sup>2</sup> as that aligns with the WSBA budget and recruitment process as part of WSBA's administration of the Board.

In fiscal year 2022, the Board focused on putting the plans developed in fiscal year 2021 to work, and it began to measure the work of the Board toward such goals. These plans will be revised as the Board moves forward, as they provide continuity which the Board has sometimes lacked as it is staffed primarily by volunteers.

### 2.1 GR 25 Annual Report Requirements

Per GR 25(f) the Board is to file a written report and meet with the Court each year. The report must contain the following information:

- 1) Board roster, including any committees formed;
- 2) Board meeting agendas;
- 3) Short description of all UPL complaints received, the disposition of the complaint, and if applicable, the name of the agencies receiving the referral;
- 4) Progress report or copies of educational materials provided to the public;
- 5) Progress report on recommended new legal service providers or legal service delivery mechanisms;
- 6) Work plan for the fiscal year; and
- 7) Long-range work plan.

## 3.0 Board Roster

### 3.1 Overall Board (Fiscal Year 2022)

Per GR 25, the Board has 13 members. At least five Board members must be persons not currently authorized to practice law (public members).

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<sup>1</sup> See Washington Courts, General Rule 25, available at [https://www.courts.wa.gov/court\\_rules/?fa=court\\_rules.display&group=ga&set=GR&ruleid=gagr25](https://www.courts.wa.gov/court_rules/?fa=court_rules.display&group=ga&set=GR&ruleid=gagr25).

<sup>2</sup> WSBA's fiscal year begins October 1 and ends September 30.

**3.1.1 Chair**

During fiscal year 2022 the Chair of the Board was Michael Cherry. He is an active legal professional.

**3.1.2 Members Not Currently Authorized to Practice Law (Public Members)**

These members of the Board in fiscal year 2022 were not authorized to practice law.

Name	Term	County
Dr. June Darling	10/1/21 – 9/30/24	Chelan
Pearl Gipson-Collier	10/1/20 – 9/30/23	Thurston
Brooks Goode	10/1/19 – 9/30/22	Spokane
Dr. David Sattler	3/12/21 – 9/30/23	Whatcom
Mir Tariq	1/1/20 – 9/30/22	King

**3.1.3 Members Authorized to Practice Law**

These members of the Board in fiscal year 2022 were authorized to practice law.

Name	Term	County
Lesli Ashley (LLLT)	10/1/21 – 9/30/24	Spokane
Sarah Bove (LLLT)	10/1/21 – 9/30/24	King
Jeremy Burke (Attorney)	4/16/21 – 9/30/23	Douglas
Michael Cherry (Attorney)	1/1/20 – 9/30/22	King
Kristina Larry (Attorney)	3/7/22 – 9/30/24	King
Drew Simshaw (Attorney)	10/1/21 – 9/30/24	Spokane
Michael Terasaki (Attorney)	4/16/21 – 9/30/23	King

**3.1.4 Liaisons with Other Boards**

During fiscal year 2022, the honorable Judge Fred Corbitt was the liaison with the Access to Justice Board. Jordan Couch was the liaison with the WSBA Board of Governors. Thea Jennings was the liaison with WSBA.

**3.2 New Board (Fiscal Year 2023)**

**3.2.1 Chair**

Michael Cherry was reappointed by the Supreme Court as Chair of the Board for fiscal year 2023. He is an active legal professional. This will be Mr. Cherry’s last year as chair.

**3.2.2 Members Not Currently Authorized to Practice Law**

These members of the Board for fiscal year 2023 are not currently authorized to practice law. There is one vacant position, which the Board is actively working to fill.

Name	Term	County
Dr. June Darling	10/1/21 – 9/30/24	Chelan
Pearl Gipson-Collier	10/1/20 – 9/30/23	Thurston
Ellen Reed	10/1/22 – 9/30/25	King
Dr. David Sattler	3/12/21 – 9/30/23	Whatcom
Vacant		

**3.2.3 Members Authorized to Practice Law**

These members of the Board for fiscal year 2023 are authorized to practice law.

Name	Term	County
Lesli Ashley (LLLT)	10/1/21 – 9/30/24	Spokane
Sarah Bove (LLLT)	10/1/21 – 9/30/24	King
Jeremy Burke (Attorney)	4/16/21 – 9/30/23	Douglas
Michael Cherry (Attorney)	10/1/22 – 9/30/25	King
Kristina Larry (Attorney)	3/7/22 – 9/30/24	King
Craig Shank (Attorney)	10/1/22 – 9/30/25	King
Drew Simshaw (Attorney)	10/1/21 – 9/30/24	Spokane
Michael Terasaki (Attorney)	4/16/21 - 9/30/23	King

**3.2.1 Candidates Submitted to the Court for Approval**

There are no pending candidates before the Court for approval. The Board hopes to submit a public candidate as soon as possible in fiscal year 2023.

**3.2.2 Liaisons with Other Boards and WSBA**

Judge Fred Corbit is the liaison with the Access to Justice Board; Governor Jordan Couch and Governor Erik Kaeding are the liaisons with the WSBA Board of Governors; and Thea Jennings is the liaison with WSBA.

**4.0 Board Agendas**

The Board holds monthly meetings. An agenda is circulated before each meeting and is published to the public, with the meeting dates on the Board page of the WSBA website.

#### **4.1 Generic Agenda**

The basic agenda for Board meetings is:

##### **4.1.1 Minutes**

Approval of the minutes of the previous meeting.

##### **4.1.2 Operations**

Recruitment and Onboarding—information related to recruitment and diversity, ensuring new members are included.

Equity and Disparity Workgroup—report on WSBA Equity and Disparity Workgroup from our liaison to the group (Mir Tariq).

##### **4.1.3 Education**

Legal Checkup—update on work on the Legal Checkup.

##### **4.1.4 Innovation**

Legal Regulatory Laboratory—update on the work on the lab.

##### **4.1.5 Executive Session (Coordination)**

If there is a UPL complaint to review, the Board meeting goes into executive session (Board members only) to determine the disposition of the complaint.

#### **4.2 Monthly Agendas**

Monthly agendas are posted on the WSBA website before each monthly meeting, and then replaced by the next monthly agenda. The Board minutes are available from the Board page of the WSBA website.

### **5.0 UPL Complaints**

#### **5.1 Meeting with County Prosecutors and Attorney General's Office**

On June 3, 2021, the Practice of Law Board met with 16 county prosecutors from across the state, and two representatives of the Attorney General's Office (AGO) to whom the Board refers UPL complaints.

The primary objective of the meeting was to discuss the Washington State Bar Act's unlawful practice statute (RCW 2.48.180), GR 24 Definition of the Practice of Law, and the elements of UPL.

All prosecutors and representatives of the AGO voiced the opinion that unless there is concrete harm, they are generally unwilling to proceed with a misdemeanor UPL charge. All parties acknowledge that harm is not an element of the statute or the court rule; however, realities of the AGO and the court resources come into play in making decisions to prosecute UPL.

For example, a county prosecutor, in notifying the Board as to why their office was declining to prosecute a forwarded complaint, commented:

[Our county] is currently working through a massive backlog of felony cases brought on by the pandemic and facing a historic shortage of criminal attorneys. Opening a complex multistate investigation into a group of non-attorneys...would be an inefficient use of our already limited resources.

However, participants discussed a willingness to send a “cease and desist” letter to people referred to their offices to see if that is sufficient to motivate most people to stop any unintended or uninformed UPL scenarios.

To facilitate and streamline the coordination of complaints, the prosecutors asked the Board to refer complaints to county sheriffs (who have the authority and resources to investigate) and copy the prosecutors.

The AGO requested that the Board forward all complaints to the AGO for review. The Board will implement this change in Fiscal Year 2023.

The Board hopes to conduct another meeting in June 2023, inviting representatives from both prosecutors’ and sheriffs’ offices throughout the state to continue to build relationships with the agencies who can act on UPL complaints.

## **5.2 Overall Complaints**

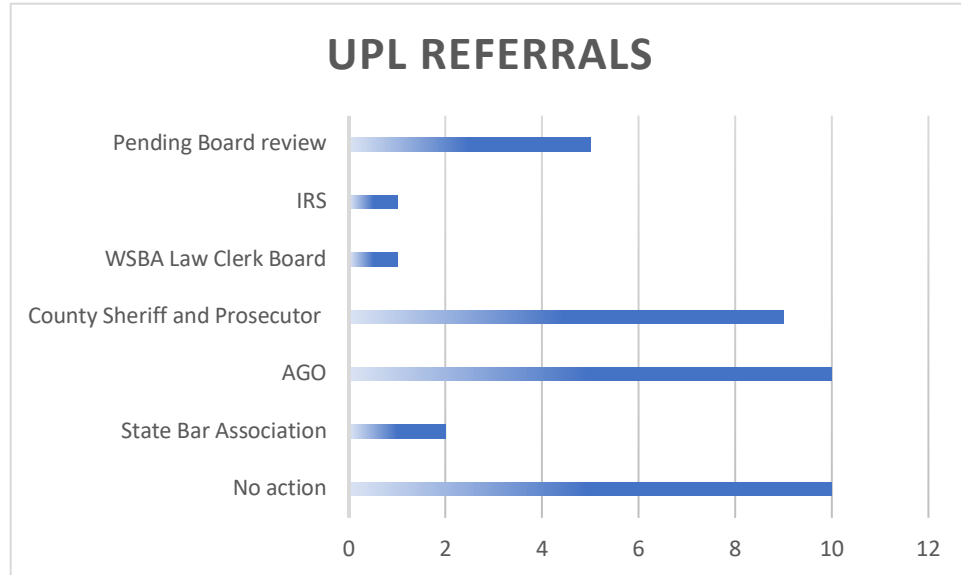
During fiscal year 2022, the Board received 31 complaints alleging UPL. This is an increase of 12 complaints from the previous fiscal year and may reflect that we are seeing more complaints about individuals for which there has already been a complaint, but against whom no agency chooses to take any action.

Five complaints were pending Board review at the end of the fiscal year.

Ten complaints were closed without a referral to any agency.

Sixteen complaints were referred to the appropriate enforcement agencies as follows:

- Four complaints were referred to the Attorney General’s Office.
- Three complaints were referred to county prosecutor and the sheriff’s offices.
- Six complaints were referred to the Attorney General’s Office, county prosecutor, and county sheriff’s offices (note one complaint also included a referral to the IRS).
- One complaint was referred to the WSBA Law Clerk Board.
- Two complaints were referred to other state bar associations (Utah and Massachusetts).

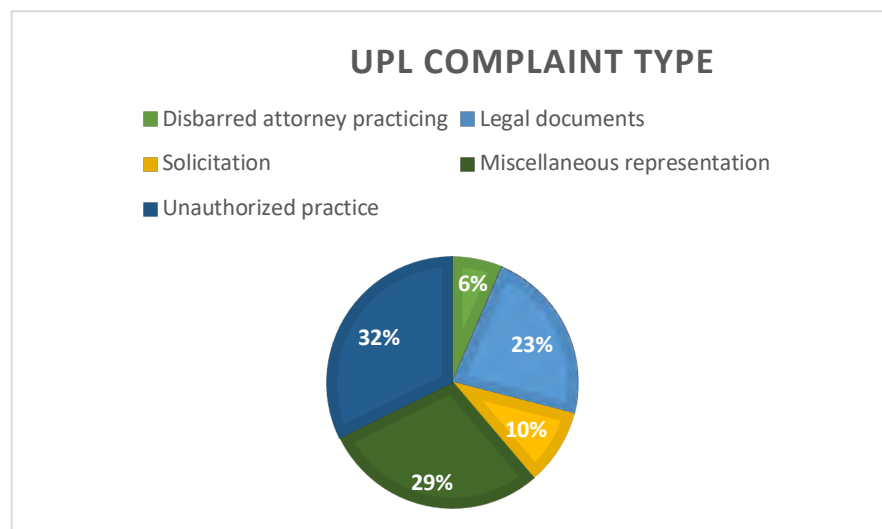


### 5.3 UPL Trends

Again, this year, UPL complaints spanned several categories.

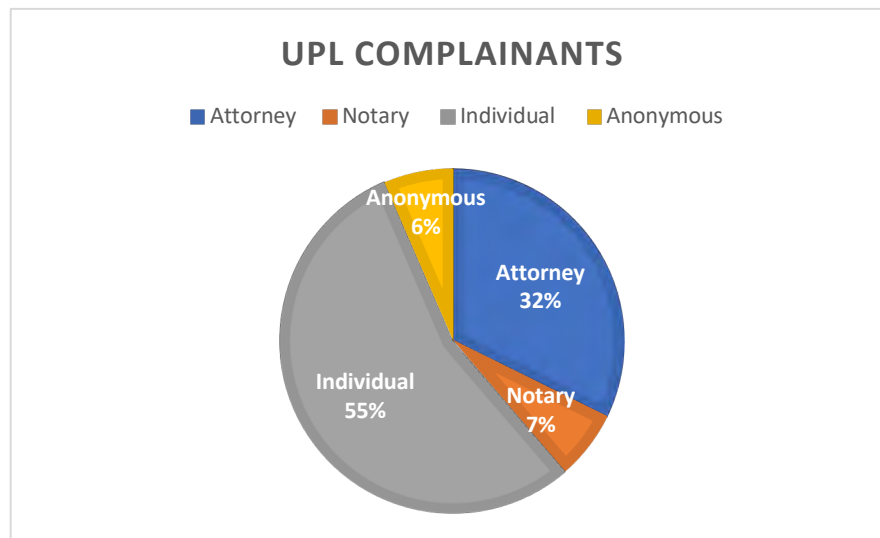
Most often, the Board receives complaints that allege legal document preparation, unauthorized legal advice, and unauthorized practice in Washington courts. Although the Board does not know whether the AGO received complaints from other sources, the AGO filed suit against the subject of a complaint the Board referred to the AGO in June 2022 that alleged unauthorized practice in Immigration Court. The matter is described in the AGO’s [press release](#).

Other complaints involved disbarred attorneys continuing to provide legal services, theft and misuse of an active Washington attorney’s identity, and a “constitutional” lawyer.



#### 5.4 UPL Process Improvements (Coordination)

The Board continued to see more public (non-legal professional) complainants versus legal professional complainants. This is good because it is the public whom the Board is trying to protect by referring complaints for action. This year, the Board also received two complaints from notaries about other notaries and two anonymous complaints.



#### 6.0 Education

To address the responsibility to educate, the Board has co-published with WSBA the first edition of a Legal Checkup. The first edition focuses on helping people find competent legal assistance from an authorized legal services provider and provides guidance on preparing for a first meeting with a legal service provider. These materials were branded with the Board’s logo and marks to help people identify the source and authority of the materials.

The first version of the [Legal Checkup is available at the WSBA website](#).

The Board, in close coordination with WSBA staff, spent considerable time reworking a contract and specification for an online version or chatbot of the Legal Checkup to better reflect a set of deliverables and schedules. The Board anticipates having a prototype early in the next fiscal year.

#### 7.0 Innovation

The Board continued to work on its blueprint for data-driven legal regulatory reform, enabled through a set of processes referred to as a Legal Regulatory Laboratory. The data-driven legal regulatory reform processes would permit the testing and potential authorization of entities to provide innovative legal services or for authorized legal service practitioners (LPOs, LLLTs, and Lawyers) to use alternative business structures.



This data-driven legal regulatory reform is modeled on the Legal Regulatory Sandbox operating under the supervision of the Utah Supreme Court's Office of Innovation.

The Board worked with Kevin Plachy, Director of Advancement, and Renata de Carvalho Garcia, Chief Regulatory Counsel & Director of Regulatory Services, to create financial models for the data-driven legal regulatory reform.

Based on the costs derived from these models, the Board will be looking for methods to bootstrap the costs of data-driven legal regulatory reform from participant funds and a totally volunteer workforce, rather than following a model of lab management supplied by WSBA.

Note that this does not mean that data-driven legal regulatory reform would not use any WSBA funding. As a Supreme Court board charged with the responsibility to manage the data-driven legal regulatory reform processes, such a board would still be administered by WSBA per the Task Force Administering Xenial Involvement with Court Appointed Board's (TAXICAB) recommendations to WSBA Board of Governors. As such, a similar amount of funding to that provided the Practice of Law Board is still anticipated to provide the new board with TAXICAB-based WSBA staffing and administrative support.

For the last year, the Board has also met with stakeholders to present information and gather feedback and input about the data-driven legal regulatory reform, including the WSBA Family Law Section Executive Committee (FLEC), the WSBA Solo & Small Practice Section, and the Domestic Relations Attorneys of Washington (DRAW)<sup>3</sup>. The Board also spoke at various conferences and CLEs, at Washington State law schools, with Lucy Ricca, Stanford Law's Director of Policy and Programs for the Deborah L. Rhode Center on the Legal Profession and advisor the Utah Office of Legal Services, with former Chief Justice Himonas of Utah, as well as with many online legal service providers.

The Board has also strived to keep its peer Access to Justice and LLLT Boards, and the Board of Governors and members of WSBA apprised of the Board's plans.

## **8.0 Other Matters**

### **8.1 ETHOS**

The Board was an active participant in the WSBA meetings and hearings related to Examining the Historical Organization and Structure of the Bar (ETHOS). A representative of the Board was present for at least part of all the meetings.

The Board takes a strong interest in this work and is supportive of the majority opinion that an integrated bar is best for the people, and the legal professionals in Washington State.

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<sup>3</sup> DRAW broke away from WSBA Family Law sections after the Limited License Legal Technician [LLLT] program was authorized by the Court.

## 8.2 TAXICAB

The Board was an active participant in the meetings of the WSBA Task Force Administering Xenial Involvement with Court Appointed Boards (TAXICAB) meetings. A representative of the Board was present for at least part of all the meetings, and the Board took a leadership role in producing a draft document to drive the discussions.

The Board takes a strong interest in this work and is supportive of documents created to define what it means to be administered by WSBA.

## 9.0 Workplans

### 9.1 Educate

The current plan for the [Legal Checkup is available at the WSBA website](#).

In fiscal year 2023, the Board hopes to:

1. Look into translating the first version of the Legal Checkup to other languages.
2. Approach law and public libraries throughout the state to make the Legal Checkup available in their branches.
3. Work on the online version of the Legal Checkup (the Legal Checkup BOT).

### 9.2 Innovate

The current plan for [data-driven legal regulatory reform is available at the WSBA website](#).

In fiscal year 2023, the Board hopes to:

1. Finalize a data-driven legal regulatory reform blueprint and recommendation for the Court.
2. Prepare draft court orders to accompany and enact data-driven legal regulatory reform per the blueprint.
3. Propose change to GR 25 to require involvement of the Practice of Law Board with any other board or agency enacting innovation for the first year.

### 9.3 Coordinate

Although there is no formal plan for coordination with the appropriate authorities for UPL complaints, the Board plans to continue to work with the AGO and county prosecutors to improve the process and to educate the public so they understand when and how to report UPL matters.

In fiscal year 2023, the Board hopes to:

1. Hold another meeting with interested agencies (Attorney General's Office, county sheriffs, and county prosecutors on UPL in Washington).
2. Draft a survey on UPL in Washington State, including a review of statutes, court rules and orders, jury instructions, and common law.

3. Revise UPL reporting process to including sheriffs and collect better documentation of the alleged complaint.
4. Update GR 24 to align with changes to the RCW regarding who can assist with representation at a domestic violence order hearing.

**9.4 Diversity and Inclusion**

The following diversity and inclusion information was supplied by WSBA.

<b>Practice of Law Board</b>		
<i>Provided by WSBA Staff</i>		
<i>Dated October 25, 2022</i>		
<b>FY22 Demographics:</b>		
The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership.		
Aside from the factors marked (*), demographic information was provided voluntarily, and individuals had the option to not respond to any or all of the factors below.		
<b>Disability</b>	No	71%
	Yes	21%
	Chose Not to Respond	8%
<b>District*</b>	1	43%
	5	7%
	8	7%
	9	7%
	Unknown	36%
<b>Ethnicity</b>	Asian – East Asian	7%
	Black, African American, or African Descent	14%
	White or European Descent	79%
	Multi Racial or Biracial	7%
	Chose Not to Respond	0%
<b>Gender</b>	Female	43%
	Male	50%
	Chose Not to Respond	7%
<b>Sexual Orientation</b>	Heterosexual	86%
	Chose Not to Respond	14%
<i>The Yes/No response for the Sexual Orientation category is data from a previous demographic question ‘Do you open identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?’ This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.</i>		

## **10.0 Long-range Workplans**

### **10.1 Educate**

1. Post first version of the Legal Checkup to other channels (social media).
2. Work on second edition of the Legal Checkup.

### **10.2 Innovate**

1. Begin work on another area of innovation.

### **10.3 Coordinate**

1. Continue to evaluate and refer complaints of UPL and educate the public on this issue.
2. Work to ensure people know how to complain and that complaints are timely referred to the appropriate authority.

### **10.4 Diversity and Inclusion**

1. Continue to work with WSBA staff to diversify the Board per the letter to the Supreme Court.

## **11.0 Budget**

For fiscal year 2022, the budget for the Board was \$12,000 in direct expenses and \$72,486 in indirect expenses. After the budget reforecast in the Spring of 2022, the budget was revised as follows: direct expenses were budgeted at \$12,000 and indirect expenses at \$67,261.

The Board did not use any of its budgeted direct expenses as all its meetings were held virtually, and the Board works hard to ensure it is not wasting resources. However, the Board likely overused indirect expenses. The Board has asked a lot of WSBA staff, and often the Board needs legal advice and research from our legal counsel and paralegal resources.

## **12.0 Acknowledgments**

It must be acknowledged that the Board's public (non-legal professional) and legal professional members volunteer significant amounts of their time to performing the duties and responsibilities of the Board.

The Board especially wants to acknowledge and thank the Board's former public members Brooks Goode and Mir Tariq for their service to the Board and the community. The Board benefited greatly from their insights and contributions.

The Board appreciates the time and guidance that the Justices of the Supreme Court have given the Board so that the Board can do the work of the Board and represent the Court and the judiciary positively in the view of the public.

The Board wants to acknowledge the hard work of Paralegal Kyla Reynolds, Assistant General Counsel Thea Jennings, General Counsel Julie Shankland, Chief Equity and Justice Officer Diana Singleton, Director of Advancement Kevin Plachy, Chief Regulatory Counsel Renata de Carvalho Garcia, Chief Disciplinary Counsel Douglas Ende, Chief Communications and Outreach Officer Sara Niegowski, Graphic Designer Jim Hanneman (for his work creating the Board's Logo), and Executive Director Terra Nevitt for their support of the Board, and their day-to-day contributions to the Board's work. Without their assistance and guidance, the Board could not have accomplished its goals.

Governor Sunitha Anjilvel and Governor Jordan Couch have also helped support the Board, especially in keeping the Board of Governors up to date on the Board's work and helping the Board understand diversity and inclusion.

The Board also wishes to acknowledge the work of WSBA's Former Past-President and Governor Kyle Sciuchetti and Immediate Past-President Brian Tollefson for their work on the TAXICAB and ETHOS, both of which are important to the Board.

Finally, the Board wants to thank the Court staff, particularly Ms. Lipford for helping us communicate with the Court, schedule meetings, and distribute the Board's work product to the Justices of the Supreme Court, and to the Justices for being gracious and in offering their feedback, guidance, and direction to the Board.

# WASHINGTON STATE BAR ASSOCIATION

Office of General Counsel

To: The President, President-elect, Immediate Past-President, and Board of Governors  
 From: Julie Shankland, General Counsel  
 Lisa Amatangel, Associate Director, OGC  
 Date: December 19, 2022  
 Re: Litigation Update

No.	Name	Brief Description	Status
1.	<i>Sangha v. Knapp et al</i> , No. 21-2-00-769-37 (Whatcom Sup. Ct.); No. 833791 (Court of Appeals Division 1)	Addresses handling of letters of complaint.	Complaint filed 08/02/21; WSBA filed motion to dismiss on 08/24/21. WSBA's motion to dismiss granted 09/24/21. Notice of appeal received 11/22/21. Scheduling order issued by the Court of Appeals on 8/16/2022.  Update since last report: On 11/29/22 Commissioner Kanazawa of the Court of Appeals dismissed the case due to abandonment.
2.	<i>Block v. WSBA et al.</i> , No. 18-cv-00907 (W.D. Wash.) (" <i>Block II</i> ")	See <i>Block I</i> (below).	On 03/21/19, the Ninth Circuit stayed <i>Block II</i> pending further action by the district court in <i>Block I</i> . On 12/17/19, Block filed a status report with the Ninth Circuit informing the Court of the <i>Block I</i> Court's reimposition of the vexatious litigant pre-filing order against Block. On 06/18/20, the Ninth Circuit lifted the stay order and ordered the appellees who have not yet filed their answering briefs to do so by 08/17/20 (WSBA filed its answer brief before the stay order was entered). Block's reply was due 10/09/20, then extended to 12/28/20.  Block filed a reply brief four months late along with a motion for extension of time. The Ninth Circuit denied Block's motion for an extension and declined to accept the reply brief. Block has filed a Motion for Reconsideration of the Order denying her motion for an extension. The Ninth Circuit set this matter for consideration without oral argument on 06/08/21. On 07/02/21, the Ninth Circuit affirmed the dismissal of <i>Block II</i>



			<p>pursuant to the original vexatious litigant order.</p> <p>Block filed in District Court a Motion to Issue Indicative ruling and an amended version of the same motion, which was denied.</p> <p>Block filed a second notice of appeal in this matter, 9<sup>th</sup> Cir., No. 21-35261), “Block II – Appeal II”. Block’s opening brief and excerpts of record were due 06/07/21. On 08/27/21, the Ninth Circuit denied the appellees’ requests for dismissal of the appeal for failure to prosecute and set a new briefing schedule; Block’s opening brief was due 09/22/21. On 09/29/21 Block filed a motion to stay the appeal or extend the deadline for her to file the opening brief by 90 days.</p> <p>On 09/09/21, Block filed a motion to vacate all decisions in this matter; WSBA opposed and the motion was denied on 09/28/21. Block appealed the Ninth Circuit Court’s 9/28/21 order, and the amended notice of appeal was added to Block II -Appeal II.</p> <p>The Ninth Circuit Court then issued an order to Block to show cause why it should not summarily dispose of this appeal; Block failed to respond and the Ninth Circuit dismissed Block II – Appeal II.</p> <p>Update since last report: This matter is closed and will be removed from the report.</p>
3.	<i>Block v. WSBA, et al.</i> , No. 15-cv-02018-RSM (W.D. Wash.) (“ <i>Block I</i> ”)	Alleges conspiracy among WSBA and others to deprive plaintiff of law license and retaliate for exercising 1st Amendment rights.	<p>On 02/11/19, the Ninth Circuit affirmed dismissal of claims against WSBA and individual WSBA defendants; the Court also vacated the pre-filing order and remanded this issue to the District Court. On 12/09/19, the United States Supreme Court denied plaintiff’s Petition of Writ of Certiorari.</p> <p>On 12/13/19, the District Court reimposed the vexatious litigant pre-filing order against</p>

			<p>Block; Block filed a notice of appeal regarding this order on 01/14/20 (“Block I – Appeal II”). Block filed an opening brief in Block I – Appeal II on 11/06/20; WSBA filed its answering brief on 01/07/21. Block’s optional Reply Brief was due on 01/28/21. Block filed a reply brief on 04/26/21 along with a motion for extension. The Ninth Circuit set this matter for consideration without oral argument on 06/08/21. On 07/02/21 the Ninth Circuit affirmed the dismissal of Block II pursuant to the original vexatious litigant order.</p> <p>On 09/10/20, Block moved to vacate the vexatious litigant order; WSBA opposed the motion and it was denied. In response to the district court’s denial of Block’s motion to vacate, on 10/01/20, Block filed a motion for an indicative ruling on whether the district court would vacate the vexatious litigant order if the appellate court remanded the case for that purpose. WSBA opposed the motion. Block filed a reply on 10/16/20. This motion was denied.</p> <p>On 09/09/21, Block filed a motion to vacate all decisions in this matter; WSBA filed an opposition on 09/20/21. This motion was denied on 09/28/21.</p> <p>Block appealed the order issued on 09/28/21. The Ninth Circuit opened a new appeal (9<sup>th</sup> Cir. No. 21-35922), “Block I – Appeal III”, in which Block’s opening brief was due 01/05/22. Block filed an untimely motion to extend the time to file her opening brief; WSBA opposed the motion on 02/07/22. Block filed an opening brief in Block I – Appeal III on 3/3/22. WSBA’s answering brief was due 5/4/22. After two extensions, Block filed a reply brief on 6/27/22.</p> <p>Update since last report: None (the appeal briefing is complete and we await further instructions from the Court of Appeals).</p>
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# WASHINGTON STATE BAR ASSOCIATION

## MEMO

**To:** Board of Governors

**From:** Jennifer Olegario, Communications and Outreach Manager

**Date:** Dec. 28, 2022

**Re:** Summary of Media Contacts, Oct. 15-Dec. 27, 2022

Date	Journalist and Media Outlet	Inquiry
Oct. 31	Jerry Cornfield, <i>The Daily Herald</i> (Everett)	Inquired about a political candidate who claimed to be a lawyer but who does not appear in the WSBA Legal Directory. Clarified that the WSBA ODC would not handle any discipline against <i>non-licensed</i> people, and referred him to the Practice of Law Board/local prosecutor or Attorney General's office to inquire there.
	Kienan Briscoe, <i>Lynwood Times</i>	Sought confirmation whether a candidate passed the bar. Sent bar exam pass list.
Nov. 3	Karen Sloan, Reuters	Sought comment regarding WA Supreme Court ruling re: Zachary Stevens. Sent public statement (see below).
	Jack Karp, Law360	Sought comment regarding WA Supreme Court ruling re: Zachary Stevens. Sent public statement (see below).
Nov. 9	Allison Dunn, Law.com	Sought comment regarding WA Supreme Court ruling re: Zachary Stevens. Sent public statement (see below).
Dec. 22	Greg Lamm, Law360	Inquired about bar bills for 2023 legislative session.

### Media Releases:

- [Ana Cecilia Lopez Named Washington State Bar Association Local Hero for Whatcom County \(Nov. 4, 2022\)](#)
- [Annalise Martucci Named Washington State Bar Association Local Hero for Skagit County \(Nov. 4, 2022\)](#)

Media Coverage:

- ["Immigration attorney agrees to suspension for failing to file clients' paperwork, mishandling fees"](#) (Oct. 25, Law.com)
- ["Washington high court says convicted sex offender can practice law"](#) (Reuters, Nov. 3)
- ["Wash. High court says sex offender can be admitted to bar"](#) (Law360), Nov. 3)
- ["Sex offender can become Washington state lawyer, court rules"](#) (*Seattle Times*, Nov. 4)
- ["He has turned his life around: Deeply split court grants bar admission despite ongoing sex offender registry requirements"](#) (Law.com, Nov. 16)

# WSBA Member\* Licensing Counts 1/3/23 9:14:49 AM GMT-08:00

Member Type	In WA State	All
Attorney - Active	26,596	34,040
Attorney - Honorary	391	121
Attorney - Inactive	2,702	444
Attorney - Pro Bono	112	5,900
Judicial	635	667
LLLT - Active	76	76
LLLT - Inactive	8	9
LPO - Active	769	784
LPO - Inactive	163	180
	31,452	42,221

By District		
	All	Active
0	4,831	3,691
1	3,009	2,506
2	2,192	1,778
3	2,112	1,760
4	1,401	1,181
5	3,330	2,725
6	3,514	2,916
7N	5,050	4,317
7S	6,436	5,299
8	2,349	2,010
9	5,060	4,293
10	2,937	2,424
	42,221	34,900

By State and Province	
Alabama	24
Alaska	196
Alberta	9
Arizona	375
Arkansas	21
Armed Forces Americas	3
Armed Forces Europe, Middle East	22
Armed Forces Pacific	10
British Columbia	96
California	2,038
Colorado	300
Connecticut	46
Delaware	8
District of Columbia	367
Florida	276
Georgia	89
Guam	15
Hawaii	142
Idaho	522
Illinois	189
Indiana	51
Iowa	28
Kansas	33
Kentucky	50
Louisiana	46
Maine	18
Maryland	118
Massachusetts	92
Michigan	78
Minnesota	112
Mississippi	5
Missouri	75
Montana	184
Nebraska	18
Nevada	163
New Hampshire	15
New Jersey	60
New Mexico	76
New York	282
North Carolina	93
North Dakota	9
Northern Mariana Islands	6
Nova Scotia	1
Ohio	96
Oklahoma	47
Ontario	18
Oregon	2,789
Pennsylvania	76
Puerto Rico	6
Quebec	2
Rhode Island	19
South Carolina	32
South Dakota	10
Tennessee	61
Texas	436
Utah	190
Vermont	14
Virginia	278
Virgin Islands	2
Washington	31,452
Washington Limited License	1
West Virginia	5
Wisconsin	52
Wyoming	21

By WA County		By Admit Yr	
Adams	16	1946	1
Asotin	25	1947	2
Benton	408	1948	2
Chelan	259	1949	1
Clallam	159	1950	4
Clark	995	1951	12
Columbia	8	1952	17
Cowlitz	138	1953	15
Douglas	40	1954	20
Ferry	8	1955	9
Franklin	60	1956	28
Garfield	3	1957	20
Grant	127	1958	24
Grays Harbor	109	1959	28
Island	150	1960	25
Jefferson	123	1961	21
King	17,462	1962	25
Kitsap	847	1963	29
Kittitas	97	1964	30
Klickitat	26	1965	44
Lewis	114	1966	55
Lincoln	13	1967	53
Mason	98	1968	70
Okanogan	89	1969	82
Pacific	30	1970	84
Pend Oreille	15	1971	90
Pierce	2,490	1972	137
San Juan	95	1973	216
Skagit	297	1974	206
Skamania	20	1975	255
Snohomish	1,722	1976	302
Spokane	2,061	1977	316
Stevens	51	1978	340
Thurston	1,735	1979	375
Wahkiakum	10	1980	391
Walla Walla	121	1981	429
Whatcom	606	1982	415
Whitman	73	1983	454
Yakima	446	1984	1,050
		1985	526
		1986	713
		1987	683
		1988	602
		1989	660
		1990	834
		1991	808
		1992	795
		1993	890
		1994	843
		1995	796
		1996	777
		1997	884
		1998	872
		1999	891
		2000	888
		2001	890
		2002	969
		2003	1,029
		2004	1,065
		2005	1,097
		2006	1,166
		2007	1,240
		2008	1,082
		2009	960
		2010	1,059
		2011	1,042
		2012	1,062
		2013	1,205
		2014	1,332
		2015	1,572
		2016	1,294
		2017	1,365
		2018	1,289
		2019	1,344
		2020	1,542
		2021	1,408
		2022	1,499

Misc Counts	
All License Types **	42,634
All WSBA Members	42,221
Members in Washington	31,452
Members in western Washington	27,200
Members in King County	17,462
Members in eastern Washington	3,946
Active Attorneys in western Washington	23,049
Active Attorneys in King County	15,247
Active Attorneys in eastern Washington	3,270
New/Young Lawyers	6,370
MCLE Reporting Group 1	11,867
MCLE Reporting Group 2	10,996
MCLE Reporting Group 3	11,695
Foreign Law Consultant	22
House Counsel	381
Indigent Representative	10

By Section ***	All	Previous Year
Administrative Law Section	256	233
Animal Law Section	92	82
Antitrust, Consumer Protection and Unfair Business Practice	195	198
Business Law Section	1,246	1,245
Cannabis Law Section	72	94
Civil Rights Law Section	178	178
Construction Law Section	503	519
Corporate Counsel Section	1,092	1,097
Creditor Debtor Rights Section	461	460
Criminal Law Section	388	378
Dispute Resolution Section	323	310
Elder Law Section	610	614
Environmental and Land Use Law Section	772	797
Family Law Section	1,014	983
Health Law Section	397	390
Indian Law Section	331	331
Intellectual Property Section	865	867
International Practice Section	245	222
Juvenile Law Section	143	146
Labor and Employment Law Section	991	970
Legal Assistance to Military Personnel Section	81	78
Lesbian, Gay, Bisexual, Transgender (LGBT) Law Section	122	107
Litigation Section	1,029	1,043
Low Bono Section	77	84
Real Property Probate and Trust Section	2,283	2,293
Senior Lawyers Section	220	226
Solo and Small Practice Section	890	905
Taxation Section	627	622
World Peace Through Law Section	137	142

\* Per WSBA Bylaws 'Members' include active attorney, emeritus pro-bono, honorary, inactive attorney, judicial, limited license legal technician (LLLT), and limited practice officer (LPO) license types.

\*\* All license types include active attorney, emeritus pro-bono, foreign law consultant, honorary, house counsel, inactive attorney, indigent representative, judicial, LPO, and LLLT.

\*\*\* The values in the All column are reset to zero at the beginning of the year (Jan 1). The Previous Year column is the total from the last day of the prior year (Dec 31). WSBA staff with complimentary membership are not included in the counts.

WSBA Member\* Demographics Report 1/3/23 8:20:08 AM GMT-08:00

By Years Licensed	
Under 6	8,431
6 to 10	6,434
11 to 15	5,285
16 to 20	5,075
21 to 25	4,172
26 to 30	3,676
31 to 35	2,988
36 to 40	2,400
41 and Over	3,762
<b>Total:</b>	<b>42,223</b>

By Age	All	Active
21 to 30	1,849	1,793
31 to 40	9,109	8,224
41 to 50	10,449	8,812
51 to 60	9,253	7,314
61 to 70	7,387	5,437
71 to 80	3,514	2,290
Over 80	662	172
<b>Total:</b>	<b>42,223</b>	<b>34,042</b>

By Practice Area	
Administrative-regulator	2,315
Agricultural	238
Animal Law	111
Antitrust	321
Appellate	1,660
Aviation	186
Banking	438
Bankruptcy	811
Business-commercial	5,263
Cannabis	163
Civil Litigation	312
Civil Rights	1,108
Collections	478
Communications	211
Constitutional	665
Construction	1,351
Consumer	775
Contracts	4,338
Corporate	3,657
Criminal	3,602
Debtor-creditor	872
Disability	567
Dispute Resolution	1,238
Education	486
Elder	813
Employment	2,812
Entertainment	324
Environmental	1,271
Estate Planning-probate	3,187
Family	2,523
Foreclosure	439
Forfeiture	93
General	2,473
Government	2,911
Guardianships	773
Health	978
Housing	342
Human Rights	321
Immigration-naturaliza	1,009
Indian	570
Insurance	1,594
Intellectual Property	2,295
International	908
Judicial Officer	455
Juvenile	784
Labor	1,129
Landlord-tenant	1,183
Land Use	876
Legal Ethics	296
Legal Research-writing	861
Legislation	454
Lgbtq	106
Litigation	4,816
Lobbying	170
Malpractice	724
Maritime	297
Military	382
Municipal	907
Non-profit-tax Exempt	657
Not Actively Practicing	2,062
Oil-gas-energy	265
Patent-trademark-copyr	1,339
Personal Injury	3,143
Privacy And Data Securit	456
Real Property	2,693
Real Property-land Use	2,090
Securities	796
Sports	184
Subrogation	126
Tax	1,290
Torts	2,044
Traffic Offenses	561
Workers Compensation	680

By Languages Spoken	
Afrikaans	5
Akan /twi	6
Albanian	2
American Sign Language	23
Amharic	22
Arabic	50
Armenian	8
Bengali	13
Bosnian	15
Bulgarian	13
Burmese	3
Cambodian	6
Cantonese	108
Cebuano	7
Chamorro	5
Chaozhou/chiu Chow	1
Chin	1
Croatian	20
Czech	7
Danish	19
Dari	5
Dutch	23
Egyptian	2
Farsi/persian	70
Finnish	8
French	680
French Creole	2
Fukienese	3
Ga/kwa	2
German	405
Gikuyu/kikuyu	1
Greek	34
Gujarati	16
Haitian Creole	3
Hebrew	39
Hindi	108
Hmong	1
Hungarian	17
Ibo	4
Icelandic	2
Ilocano	9
Indonesian	12
Italian	168
Japanese	213
Javanese	1
Kannada/canares	3
Kapampangan	2
Khmer	3
Korean	246
Kurdish/kurmanji	1
Lao	5
Latvian	6
Lithuanian	6
Malay	5
Malayalam	8
Mandarin	421
Marathi	6
Mien	1
Mongolian	1
Navajo	1
Nepali	4
Norwegian	36
Not_listed	53
Oromo	3
Pashto	1
Persian	24
Polish	35
Portuguese	133
Portuguese Creole	1
Punjabi	71
Romanian	24
Russian	235
Samoan	7
Serbian	16
Serbo-croatian	12
Sign Language	20
Singhalese	2
Slovak	3
Spanish	1,871
Spanish Creole	2
Swahili	9
Swedish	53
Tagalog	73
Taishanese	5
Taiwanese	24
Tamil	10
Telugu	4
Thai	14
Tigrinya	5
Tongan	2
Turkish	16
Ukrainian	45
Urdu	47
Vietnamese	92
Yoruba	10
Yugoslavian	3

By Ethnicity	
American Indian / Native American / Alaskan Native	224
Asian-Central Asian	25
Asian-East Asian	314
Asian-South Asian	93
Asian-Southeast Asian	98
Asian—unspecified	988
Black / African American / African Descent	669
Hispanic / Latinx	708
Middle Eastern Descent	37
Multi Racial / Bi Racial	1,122
Not Listed	223
Pacific Islander / Native Hawaiian	61
White / European Descent	22,493
<b>Respondents</b>	<b>27,055</b>
<b>No Response</b>	<b>15,168</b>
<b>All Member Types</b>	<b>42,223</b>

By Sexual Orientation	
Asexual	24
Gay, Lesbian, Bisexual, Pansexual, or Queer	701
Heterosexual	5,995
Not Listed	131
Selected multiple orientations	34
Two-spirit	3
<b>Respondents</b>	<b>6,888</b>
<b>No Response</b>	<b>35,335</b>
<b>All Member Types</b>	<b>42,223</b>

By Disability	
Yes	1,337
No	19,834
<b>Respondents</b>	<b>21,171</b>
<b>No Response</b>	<b>21,052</b>
<b>All Member Types</b>	<b>42,223</b>

By Gender	
Female	11,403
Gender Non-Confirmin	4
Genderqueer	4
Male	15,233
Man	722
Non-Binary	29
Not Listed	37
Selected Mult Gender	40
Transgender	1
Two-spirit	3
Woman	775
<b>Respondents</b>	<b>28,251</b>
<b>No Response</b>	<b>13,972</b>
<b>All Member Types</b>	<b>42,223</b>

Members in Firm Type	
Bank	45
Escrow Company	67
Government/ Public Secto	5,197
House Counsel	3,284
Non-profit	558
Title Company	134
Solo	5,037
Solo In Shared Office Or	1,161
2-5 Members in Firm	4,126
6-10 Members in Firm	1,644
11-20 Members in Firm	1,223
21-35 Members in Firm	756
36-50 Members In Firm	576
51-100 Members in Firm	612
100+ Members in Firm	1,835
Not Actively Practicing	2,285
<b>Respondents</b>	<b>28,540</b>
<b>No Response</b>	<b>13,683</b>
<b>All Member Types</b>	<b>42,223</b>

\* Includes active attorneys, emeritus pro-bono, honorary, inactive attorneys, judicial, limited license legal technician (LLLT), and limited practice officer (LPO).

**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

**FROM:** Sunitha Anjilvel, Co-chair of DEI Council and SaNni Lemonidis, Chair of DEI Council Definition of Diversity Subcommittee

**DATE:** December 26, 2022

**RE:** The Diversity, Equity and Inclusion Council's proposal to amend the definition of diversity in the bylaws as it relates to the At-Large Governor position

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**FIRST READ:** The Diversity, Equity and Inclusion (DEI) Council is requesting a first read of its proposal to amend the definition of diversity in the bylaws, specifically as it relates to the At-Large Governor position. The proposal includes accompanying draft changes to the WSBA Bylaws.

It is the directive of the Washington Supreme Court per GR 12(2) 6 that the Bar Association should strive to promote diversity and equality in the legal profession. The challenge for our Bar Association is to implement policies and procedures that are clear, unambiguous and that serve to increase representation by and for those from historically underrepresented communities. WSBA bylaws establish an election process for a Diversity At-Large seat on the Board of Governors. Per *Article VI 3A* the DEI Council is tasked with interviewing all applicants for the At-Large Governor position, and then forwarding at least three candidates to be placed on the ballot.

The bylaws currently provide that:

***“Underrepresentation and diversity may be based upon, but not be limited to age, race, gender, sexual orientation, disability, geography, areas and types of practice, and years of membership, provided that no single factor will be determinative.”***

The DEI Council is proposing a change to the definition of diversity in the bylaws as follows:

***“Diversity refers to meaningful representation of, and equal opportunities for, individuals who have a lived experience as a member from one or more historically underrepresented communities in the legal profession. Underrepresentation encompasses and is not limited to, race, disability, age, ethnicity, religion, sexual orientation, gender identity, and gender expression.”***

The DEI Council is proposing this change because it is a more transparent, intentional definition that effectively aligns with the objective of promoting diversity and equality and more accurately delineates the underrepresented groups that the Diversity BOG seat is intended to represent. The lack of diversity in the legal profession has led collaterally to a lack of diversity in leadership roles within the profession.

From our 2012 membership study and demographic data since then we know that attracting and retaining diverse individuals is an ongoing challenge. Meaningful representation at the leadership level by those who have the lived experience of being marginalized will bring an ongoing valuable perspective to the BOG. It will also afford more opportunities for effective action based on authentic perspectives. The recognition of systemically marginalized communities, as listed nonexclusively in our proposed definition, will provide the opportunity for more meaningful diversity of body and diversity of thought on the BOG.

While it is always difficult to define, assess and/or quantify the success of a particular rule change, success might be measured in several ways. Measuring the incremental increases in the number of legal professionals from underrepresented communities, not only on the BOG, but also within the broader membership of WSBA who enter and stay within the legal profession would be one indicator of success. The goal is to see numbers that more accurately reflect current demographics within the general population. Another measure of success, more difficult to quantify, would be whether after the bylaw change, a greater focus on DEI related issues occurs at the BOG level and whether the BOG as a whole is more accountable to the objective of promoting diversity than before the change. Success could be measured by using self-assessment tools, surveys and an analysis to be conducted by the DEI Council.

We propose that the BOG engage in a first reading of our proposed amendments to the bylaws. We are open to the BOG's feedback to inform the second reading and action, which we request be done at the BOG's meeting in March 2023.

## I. BACKGROUND

In February 2001 the Board of Governors passed a resolution creating two At-Large seats for members from underrepresented communities. The resolution, which ultimately became enshrined in the bylaws provided that the At-Large Diversity seats were subject to an election by the Board of Governors as opposed to an election by WSBA members. Attached is a copy of the resolution.

In March of 2010 the Board of Governors formally adopted a definition of diversity as a policy. The definition provided that:

***“Diversity refers to individuals who self-identify with those groups historically discriminated against and or those groups that are historically under-represented in the legal profession based upon but not limited to disability, gender, age, familial status, race, ethnicity, religion, economic class, sexual orientation, gender identity and gender expression. Geographic diversity and area of practice shall also be given consideration.”***

The Council is not proposing to replace the general definition of diversity at this time but may revisit this at a later time. The pending proposal is limited to bylaws concerning the At-Large Governor seat.

In March 2021 the DEI Council submitted feedback to the BOG and proposed amendments to Article VI of the bylaws to allow for a process wherein At-Large Governor elections would be subject to an electorate of statewide WSBA members and where candidates are interviewed by the DEI Council before they placed on the ballot. The DEI council's proposal stipulated that elections were to occur after the conclusion of the congressional elections and created a process whereby a candidate running for a congressional election was not precluded from applying for an At-Large Governor position. The memo supporting these amendments is attached and provides our reasoning for refining the election process. The Board of Governors passed these amendments which were subsequently approved by the Supreme Court.

The proposal the DEI Council is now putting forward will improve the election process by providing a clearer definition of diversity in the bylaws. The Council has conducted research including reviewing what other bar associations including the how the ABA has defined diversity (see [ABA Member Diversity Equity and Inclusion Plan](#)). The proposed definition submitted for this first reading has been analyzed, debated and has gone through multiple iterations and drafts by the DEI Council and its drafting subcommittee after receiving significant community input as outlined below.

## II. COMMUNITY INPUT

We shared the initial proposed changes to the definition of diversity with many stakeholders, including the Minority Bar Associations, local bar associations, the Washington law schools and student groups for historically underrepresented students, and law firms who engage in DEI work.

We also held two community feedback sessions in mid-April 2022. For those that were unable to attend a feedback session and/or wished to have time to think about their responses, we created an anonymous survey asking six questions. The questions were:

1. Do you have any suggested changes to our living proposed definition above? If so, please indicate what you would like added or removed.
2. Are there additional social identities you feel should be listed out?
3. Are there any social identities you feel should not be listed?
4. The definition of diversity mainly looks at having lived experience from a systemically oppressed community, that is now underrepresented in the legal profession.
5. Do you think geography should be included in this category?
6. Any other comments/feedback?

There were nine responses to the survey, with varying perspectives including on whether to keep geography in the definition. Other responses questioned whether or not sex should be explicitly named along with gender, whether class and socioeconomic status should be added, and whether all marginalized social identities outlined in the [ADRESSING model](#) (Age, Disability, Religion, Ethnicity, Sexual

Orientation, Socioeconomic Status, Indigenous heritage, National Origin, Gender), which was created by Pamela Hays and adapted by Dr. Leticia Nieto, should be included.

During the first feedback session, there was a discussion surrounding whether or not geography should be included, if sex needed to be included and if we would be conflating sex with gender, naming both cisgender and transgender gender identities as being underrepresented, and whether or not we wanted to center race. That was incorporated into the draft definition and informed the second feedback session.

The discussion during the second feedback session focused on whether or not listing out what is meant by underrepresentation would be helpful or excluding certain groups that were unintentionally not listed.

After the DEI Council’s Definition of Diversity Subcommittee incorporated feedback from these discussions, it solicited additional feedback in Fall 2022 from the Minority Bar Association leaders, the Gender and Justice Commission and the Minority and Justice Commission. The MBA leaders suggested making edits so it is clear that a person self-identifies what social identities they have and affirmed language referencing intersectionality and acknowledging that race exacerbates inequities. The Gender and Justice Commission suggested that transgender and cisgender need not be explicitly stated but suggested that gender expression and gender identity replace the word gender. The Minority and Justice Commission affirmed the language about intersectionality and race exacerbating inequities.

The DEI Council discussed at length the additional feedback shared by the community and whether to include language about geography, intersectionality and race exacerbating inequities. The Council determined that geographic diversity is already incorporated into the framework of BOG members representing districts across the state. The Council decided to not include specific language about intersectionality and centering race at this time.

*WSBA RISK ANALYSIS: This section is to be completed by the Office of General Counsel, with input from the proposing entity or individual.*

The BOG is asked to modify the WSBA Bylaw language establishing criteria for at large Governors. At a high level, the proposal changes the current Bylaw in the following ways:

Current Bylaw	Proposed Bylaw
Age	Age
Race	Race
Gender	Gender identity and Gender expression
Sexual orientation	Sexual orientation
Disability	Disability
Geographic Area	(delete)



Types of Practice	(delete)
Years of Membership	(delete)
	ethnicity
	religion
	Adds a specific reference to lived experience from one or more historically underrepresented communities in the legal profession

The Board should consider whether removing or adding any of the suggested factors creates legal risk for WSBA.

**Factors Removed:**

**Geographic Area:** Based on the State Bar Act, 11 of the Governors are from specific geographical areas (Congressional Districts). Additionally, the Bylaws currently require rotation of the President position between Eastern and Western Washington. Eliminating geographic area from the factors for the at large positions does not appear to pose legal risk for the WSBA.

**Type of Practice:** Eliminating this factor does not appear to pose legal risk for the WSBA. WSBA members can change types of practice at any time. WSBA members may have knowledge of types of practice based on prior experience rather than current practice. Eliminating this factor also does not seem to necessarily decrease the diversity on the Board.

**Years of Membership:** Eliminating this factor does not appear to pose legal risk for the WSBA. One at large Governor is required to meet the definition of “young lawyer” in the Bylaws. That definition has two parts--under age 36 and less than five years of admission to practice in any state. (Article XII.B)

**Factors Added:**

**Ethnicity:** Adding ethnicity does not appear to pose a legal risk. This is one of several types of information that is subject to voluntary disclosure and should be maintained confidentially.

**Religion:** Adding religion as a factor to the Bylaw does not appear to pose a significant legal risk. Adding this factor appears to be intended to provide an opportunity for board service to people with lived experience in religions historically underrepresented in the legal profession. Adding this factor does not appear to signal an intend to discuss specific religious beliefs while determining WSBA policies.

*WSBA FISCAL ANALYSIS: This section is to be completed by the Finance Department, with input from the proposing entity or individual.*

The fiscal impact to WSBA resulting from the proposed changes to the bylaws is limited to the amount of staff time used to incorporate the changes to WSBA records and outreach to communicate the changes. The staff time that would be allocated to this work is included in the overall duties of existing WSBA staff and would not require additional staff or allocation of resources from other internal sources.

*WSBA EQUITY ANALYSIS: This section is to be completed by the Equity and Justice Team, with input from the proposing entity or individual.*

This is a positive step forward in thinking about what it means to lead with an equity lens and center those who are closest to systemic oppression. As the DEI Council continues to work towards advancing DEI, we encourage the Council and BOG to continue to work towards its commitment of centering Black, Indigenous, and people of color as outlined in its resolutions in June 2020 and November 2020 and the Race and Equity Justice Initiative commitments. We also encourage the DEI Council to follow up with those who shared feedback on the earlier drafts and let them know how their feedback was or was not incorporated into the proposal.

#### Attachments

- Resolution Adopting At-Large BOG Seat in February 2001
- Diversity Definition Adopted by the WSBA BOG in March 2010
- WSBA Diversity Committee March 17, 2021 memo regarding proposed amendments to Article VI of the WSBA Bylaws



# WSBA

## RESOLUTION

WHEREAS, the elected Governors of the Washington State Bar Association are elected from the nine congressional districts of the State of Washington as a means to provide geographical representation for all members of the Association; and

WHEREAS, the Board of Governors of the Washington State Bar Association recognize that the election process does not provide sufficient input and insight from all members served, and further does not always result in the election of a Board of Governor that is representative of the changing membership and geographical array of the membership of the Washington State Bar Association; and

WHEREAS, the Board of Governors and the Washington State Bar Association can and will benefit from the insight, advocacy and unique knowledge of under-represented lawyers in achieving the Association's mission statement and representing its members; and

WHEREAS, the Board of Governors of the Washington State Bar Association recognize that examples of under-represented groups of attorneys may, depending upon the outcome of any Board election, include women, young or new lawyers, government lawyers, lawyers engaged in criminal defense or in the prosecution of criminal matters, lawyers from remote and outlying parts of the State of Washington and from outside the State; and ethnic and sexual minority lawyers; and

WHEREAS, the Board of Governors of the Washington State Bar Association is authorized to create up to 15 total seats on the Board by means provided in the bylaws of the Association under RCW 2.48.030 and the authority of the Supreme Court of Washington, and wishes to create "at large" seats to be elected by the Board of Governors to represent under-represented members who may provide representation, knowledge, and benefits to offset the structural deficiencies which operate as a barrier to election;

### NOW, THEREFORE, BE IT RESOLVED:

The Washington State Bar Association Board of Governors hereby creates two "at large" seats to be filled from under-represented groups as defined in the bylaws, the occupant of each to serve a three-year term, and to be selected as follows to: the first to be filled by election by the Board of Governors in June 2001 and the second in June 2002; and

BE IT FURTHER RESOLVED, that the Board Governors shall fill each vacant "at large" seat designated to be filled by election from nominations made. The Governors shall fill such seats with a representative to serve as Governor who will, in the Board's sole discretion, have the experience, and knowledge of the needs of those lawyers whose membership is or may be

historically under-represented in governance. Such "at large" members will assure a Board that is a more diverse and broadly representative body that the results of the present method of election provided for by the State Bar Act allows.

BE IT FURTHER RESOLVED, that the President of the Washington State Bar Association shall promptly appoint a committee to draft necessary revisions to the Bylaws of the Washington State Bar Association to effect this Resolution with a view toward approving those revisions at the next meeting of the Board of Governors held after adoption of this resolution.

Approved by resolution of the Board of Governors on the 19 day of February, 2001.

  
\_\_\_\_\_  
Jan Eric Peterson, President

ATTEST:

  
\_\_\_\_\_  
M. Janice Michels, Executive Director, and  
Secretary to the Board of Governors

### **How WSBA Defines Diversity**

Diversity refers to meaningful representation of and equal opportunities for individuals who self-identify with those groups that are under-represented in the legal profession based upon, but not limited to, disability, gender, age, familial status, race, ethnicity, religion, economic class, sexual orientation, gender identity and gender expression. Statewide geographic diversity and area of practice shall also be given consideration.

Adopted by the WSBA Board of Governors in March 2010.

**MEMO**

**To:** President Rajeev Majumdar and the Board of Governors

**From:** WSBA Diversity Committee

**Date:** March 17, 2021

**Re:** Proposal for the Board of Governors

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The Diversity Committee respectfully submits its unanimous feedback in response to the Board of Governor's (BOG) proposed amendments to Article VI of the WSBA Bylaws. The Diversity Committee's primary purpose is to implement the [WSBA Diversity and Inclusion Plan](#), which outlines the WSBA's long standing philosophy and practice of "leading from the inside-out." This philosophy holds that a significant inward focus is the best foundation for impacting diversity, inclusion, and equity in the legal profession. In committing to a culture of inclusion and cultural competence within the BOG, we can then model the same with both credibility and integrity for the larger legal community.

The proposed bylaw amendments relate to the procedures, terms, and conditions for the election of the At Large Governor seats. As such, we feel particularly obligated to address our concerns about how this may impact the ultimate goal of ensuring diverse representation on the BOG. This also reflects upon the values and priorities around diversity, equity and inclusion as set forth in both our diversity plan and our inside-out philosophy.

The Diversity Committee believes that the current proposed revisions to the WSBA Bylaws would have a negative impact on the pipeline and ability of diverse candidates to run for and serve on the BOG whether through the election of the Governors from Congressional Districts that serve on the BOG or the Member At Large Governor positions.

From our membership study, we know that attracting and retaining diverse populations into the legal field requires meaningful and creative pipeline programs that are responsive to and mitigate against historical barriers. The purpose of the Member At Large Governor position was to address these very challenges. Its purpose recognized that there was a lack of diversity in the legal profession, which had as a collateral consequence, a lack of diversity in the leadership. We note that creating this delegated "Member At Large Governor" seat for the deliberate presence and participation of individuals from historically underrepresented or marginalized communities was not intended to exclude or create additional restrictions on any other means of obtaining a seat on the BOG. With consideration for the purpose and background of the "Member At Large Governor" seat, we strongly believe that the current proposed amendments to the WSBA Bylaws would negatively impact the pipeline of candidates from traditionally underrepresented communities to the BOG by restraining or limiting the means by which qualified diverse candidates may participate, and of course, does not honor the spirit or intent of the At Large Seat, nor is it consistent with the goal of increasing diversity within the BOG and the legal profession.

Furthermore, having a diverse body that serves on the BOG is tantamount to (a) the BOG representing and sharing diverse perspectives on the issues facing the members of the WSBA; (b) the BOG's commitment to equity and inclusion within the legal profession; and (c) a more thoughtful and impactful representation of the communities which the members serve. In essence, a credible bar association reflects the diversity of its membership.

Proposal:

Accordingly, the Diversity Committee hereby proposes an amendment to the WSBA Bylaws that would provide for the following:

(1) that the Member At Large Governor elections would occur after the conclusion of the elections for the Governors from Congressional Districts; and

(2) that a candidate running for election as a Governor in the Congressional Districts, should be not be precluded from running in the election for the Member At Large Governor positions.

Revisiting these provisions of the bylaws affords another opportunity for the BOG to recommit, by both words and actions, to its stated diversity, inclusion, and equity values. We ask that the BOG consider the Diversity Committee's perspective on the proposed amendments and advance the proposal we have provided above.

# WASHINGTON STATE BAR ASSOCIATION

## BOARD OF GOVERNORS MEETING MINUTES

**Bellingham, WA  
November 5, 2022**

### Call to Order and Welcome ([link](#))

The meeting of the Board of Governors of the Washington State Bar Association (WSBA) was called to order by President Daniel D. Clark on Saturday, November 5 at 8:34 AM. Governors in attendance were:

Francis Adewale  
Lauren Boyd  
Jordan Couch  
Matthew Dresden  
Kevin Fay  
Erik Kaeding  
Nam Nguyen  
Kari Petrasek  
Brett Purtzer  
Mary Rathbone  
Serena Sayani  
Alec Stephens  
Brent Williams-Ruth

Also in attendance were President-Elect Hunter Abell, Peter Arkison, Executive Administrator Shelly Bynum, Adam Chapman, Meng Li Che (WA BIIA), Court Rules and Procedures Committee Chair Paul Crisalli, Practice of Law Board Chair Michael Cherry, Volunteer Engagement Advisor Paris Eriksen, WSBF President Judge Tracy Flood, Nancy Hawkins (Family Law Section Executive Committee), Associate Director for Regulatory Services Bobby Henry, Carla Higginson, Outreach Specialist Michael Kroner, Executive Director Terra Nevitt, Chief Communications and Outreach Officer Sara Niegowski, Broadcast Services Manager Rex Nolte, Communication Strategies Manager Jennifer Olegario, Advancement Director Kevin Plachy, Kyle Sciuchetti, General Counsel Julie Shankland, Chief Disciplinary Counsel Douglas Ende, Chief Equity and Justice Officer Diana Singleton, Immediate Past President Brian Tollefson, and Member Services and Engagement Manager Julianne Unite.

### Consent Calendar ([link](#))

Gov. Fay moved for approval of the consent calendar. Motion passed unanimously.

### Member & Public Comments ([link](#))

There were no public comments.



President's Report ([link](#))

The Board was referred to Pres. Clark's written report. There was no discussion.

Executive Director's Report ([link](#))

The Board was referred to the Executive Director's written report.

The Board heard public comment from Nancy Hawkins who suggested that in reaching out with regard to the Board's goals, the Executive Director include outreach to sections. Ms. Hawkins also expressed concern that due to small group work, the goal-setting retreat was effectively closed.

Reports of Standing or Ongoing BOG Committees ([link](#))

*Awards Committee.* No report.

*Budget and Audit Committee.* No report.

*Equity and Disparity Workgroup.* Gov. Stephens reported that the Task Force is currently seeking input on proposed changes to GR 12 and has received requests for more time to comment. Gov. Fay moved to extend the charter of the workgroup until the March Board of Governors meeting. Motion passed unanimously.

*Executive Committee.* The Board was referred to the written materials.

*Legislative Committee.* No report.

*Personnel Committee.* Deferred.

*Long-Range Strategic Planning Council.* The Board was referred to the written materials.

*Member Engagement Council.* Gov. Dresden reported that the committee is setting up meetings with local bar associations.

*Diversity, Equity and Inclusion Council.* No report.

*Nominations Committee.* No report.

*Supreme Court Bar Licensure Task Force.* Gov. Williams-Ruth reported on a new road map and timeline for the Task Force and outlined plans for outreach.

Approve Revisions to Volunteer Vaccination Policy ([link](#))

Gov. Petrasek presented the recommendation prepared by Volunteer Engagement Advisor Eriksen, Gov. Fay, Human Resources Director Klinefelter-Sio, Gov. Petrasek, Director of Advancement Plachy, and Immediate Past Pres. Tollefson, which is to rescind the volunteer vaccination policy and to approve a framework for the Executive Director to adopt health and safety policies. Discussion followed regarding alignment with the Supreme Court's most recent order; the Executive Director's authority with regard to health and safety; interim measures and the potential for a delayed implementation; and clarity regarding the proposal. It was clarified that the recommendation is not intended to imply that the Executive Director does not already have emergency authority for health and safety. Gov. Petrasek moved to rescind the volunteer vaccination policy effective Friday, November 18. Motion passed unanimously. Gov. Purtzer was not present for the vote.

### Governor Roundtable ([link](#))

Gov. Petrasek, Chair of the WSBA Small Town and Rural (STAR) Committee, noted that the Governor of the State of Washington has signed a proclamation establishing November 15 as Rural Practice Day. Gov. Stephens commented on the importance of hybrid meetings. Gov. Williams-Ruth commented about the importance of providing adequate notice before changing established Board meeting norms. Gov. Williams-Ruther further commented on a request to change our norms for more efficient meeting scheduling.

### Approve Court Rules and Procedures Committee Proposed Amendment to CrRLJ 4.7 ([link](#))

Chair Crisalli presented the recommendation of the Committee. Discussion followed regarding community outreach and specific elements of the proposed changes and support for the proposed change. Gov. Stephens moved for approval.

The Board took public comment from Judge Flood that, in community courts, participants are referred to as such and are not referred to as “defendants”. Discussion followed about amending the rule.

Gov. Stephens moved to postpone action to the January meeting to give the Committee time to consider the feedback. Discussion followed for and against the motion to table. The motion was withdrawn with approval of the second. The underlying motion passed 11-1. Gov. Purtzer was not present for the vote.

The Board took public comment from Nancy Hawkins expressing concern about the process of executive session and the lack of advance notice provided.

### Executive Session ([link](#))

On behalf of Pres. Clark, Executive Director Nevitt announced that the Board would meet in executive session at 10:06 AM. The Board met in executive session until 10:35 AM.

Executive Director Nevitt made a brief report on Executive Session.

### Council on Public Defense Matters ([link](#))

Prof. Boruchowitz presented two proposals from the Council on Public Defense and sought approval of the Board. The first request was for approval of a CPD statement addressing minimum qualification for representation of persons accused of Class B and C felonies. Gov. Stephens moved to approve the first request. There was no discussion. Motion passed unanimously. The second request was for approval of a CPD letter supporting the budget request for the Office of Public Defense. Gov. Stephens moved to approve the Council submitting the letter regarding the OPD budget. Motion passed unanimously.

### Approval of Executive Director Evaluation Process and Elements for FY22 and Beyond ([link](#))

Gov. Stephens presented the recommendation of the Committee based on feedback provided at the September meeting, including the time period that the evaluation will cover and the individuals that will be asked to participate in the evaluation. He reviewed the evaluation elements and timeline. Discussion followed about the timing of future evaluations and participation of the governors most recently appointed. Gov. Fay moved for approval. Motion passed 12-1.

### Discuss BOG Recruitment Policy ([link](#))

Executive Director Nevitt provided background information about the BOG recruiting policy and the purposes of the discussion. Volunteer Engagement Advisor Paris Eriksen provided an overview of the steps that WSBA takes to recruit candidates for the Board of Governors. Discussion followed about the challenges

of the current policy; the challenges of recruiting members to serve on the Board; alternative approaches to leadership development; and the involvement of governors and whether it can appear as a conflict of interest.

The Board took public comment from former Board Member and President Kyle Sciuchetti about the value of having former and outgoing governors speak to their experience on the Board. The Board took public comment from Nancy Hawkins in favor of having staff as well as BOG involvement, as well as using a committee that includes broader perspectives.

Gov. Kaeding moved to suspend the policy pending a new proposal. Motion passed unanimously. Gov. Williams-Ruth was not present for the vote.

#### Approve Legislative Review Committee Recommendations ([link](#))

Committee member Kyle Sciuchetti presented the recommendation of the Legislative Review Committee to sponsor legislation to amend provisions in Washington's Business Corporation Act. WSBA Legislative Affairs Manager Sanjay Walvekar provided an overview of the amendments and the vetting process. Discussion followed about what it means to sponsor a bill rather than simply support it. Gov. Fay moved for approval. Motion passed 10-1. Govs. Couch and Williams-Ruth were not present for the vote.

Manager Walvekar presented the 2023 legislative priorities. Gov. Boyd moved for approval. It was clarified that there was no change to the priorities from the prior year. Motion passed unanimously. Govs Couch and Williams-Ruth were not present for the vote.

#### Overview of WSBA's APR 6 Law Clerk Program ([link](#))

Katherine Skinner, WSBA Law Clerk Program Lead, and Emily Mowery, Law Clerk Board Chair, provided an overview of the APR 6 Law Clerk Program. Brief discussion followed about the successes and the challenges of the program, including the desire for reciprocity with other states. There was a request for aggregate data information related to the demographics of law clerk participants and current Washington lawyers who completed the program.

#### Washington State Bar Foundation Annual Report ([link](#))

Pres. Flood presented the annual report of the Washington State Bar Foundation.

#### Annual Anti-Harassment Training ([link](#))

The Board received its annual anti-harassment training from Clarence Belnavis.

#### **ADJOURNMENT ([link](#))**

There being no further business, Pres. Clark adjourned the meeting at 3:42 PM on Saturday, November 5, 2022.

Respectfully submitted,

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Terra Nevitt

WSBA Executive Director & Secretary



**Board of Governors Meeting – Motions List  
Bellingham, WA  
November 5, 2022**

1. Motion to approve the Consent Calendar. Motion passed unanimously.
2. Motion to extend the charter of the [Equity and Disparity] workgroup until the March 2023 Board of Governors meeting. Motion passed unanimously.
3. Motion to rescind the volunteer vaccination policy effective Friday, November 18, 2022. Motion passed unanimously.
4. Motion to approve [the Court Rules and Procedures Committee proposed amendment to CrRLJ 4.7]. Motion passed 11-1. Gov. Purtzer was not present for the vote.
5. Motion to approve [the Council on Public Defense statement addressing minimum qualification for representation of persons accused of Class B and C felonies]. Motion passed unanimously.
6. Motion to approve the Council [on Public Defense] submitting [a] regarding the Office of Public Defense budget. Motion passed unanimously.
7. Motion to approve of [the Executive Director evaluation process and elements for FY22 and beyond]. Motion passed 12-1.
8. Motion to suspend the [BOG recruitment] policy pending a new proposal. Motion passed unanimously. Gov. Williams-Ruth was not present for the vote.
9. Motion to approve [the Legislative Review Committee recommendation to sponsor legislation to amend provisions in Washington's Business Corporation Act]. Motion passed 10-1. Govs. Couch and Williams-Ruth were not present for the vote.
10. Motion to approve [the 2023 legislative priorities]. Motion passed unanimously. Govs Couch and Williams-Ruth were not present for the vote.

**TO:** WSBA Board of Governors  
**CC:** Terra Nevitt, Executive Director  
**FROM:** Alexis Hartwell-Gobeske (Cannabis Law Section)  
**STAFF CONTACT:** Carolyn MacGregor, Sections Program Specialist  
Julianne Unite, Member Services and Engagement Manager  
Kevin Plachy, Advancement Department Director  
**DATE:** 11/21/2022  
**RE:** Amending Cannabis Law Section Bylaws

**CONSENT:** Cannabis Law Section desires to expand the scope of its subject matter to include liquor law and psychedelics law.

The Cannabis Law Section desires to amend its bylaws such that the section's scope would be broadened to include liquor, cannabis and psychedelics law. We desire this expansion to serve two primary issues: (i) we are facing a membership shortage and believe that expanding our substantive subject area would make membership in the section desirable for practitioners in liquor law and psychedelics law, thus increasing our membership; and (ii) adding substantive subject matters will rationally fill an existing gap in practice area representation at the section level.

Although the practice of cannabis law is growing and expanding, it is still a rather niche practice area, and one could say the same for both psychedelics law and liquor law. By combining these three related subject areas, the section can expand its reach to a broader audience, provide educational opportunities that engage multiple practice areas and expose its membership benefits to practitioners not currently members in the section. The section is lacking a sufficient number of members to maintain long-term viability. Its current membership count is 72 members, and one of the section's goals in expanding its subject matter scope is to attract new members by providing valuable resources for attorneys, students, LLLTs, and other potential members who practice in, or desire to practice in, liquor law and psychedelics laws.

No existing section includes either liquor law or psychedelics law in its core subject area, and CLE programming on these topics rarely occur. Attorneys practicing in these highly nuanced areas of law appear to be without adequate subject matter educational opportunities, networking opportunities, and a venue for the exchange of ideas. The section desires to provide the above resources to practitioners practicing in liquor law and psychedelics law. The section recognizes that it really is the best fit for these areas of law because liquor and cannabis are regulated similarly and by the same in-state agency (Washington State Liquor and Cannabis Board), and because many cannabis practitioners are already integrating the practice of psychedelics law into their practices. This proposed expansion is a natural fit for the section.

Liquor laws are well established both federally and within Washington state. However, psychedelics law is still in its infancy in Washington state, just as cannabis was almost a decade ago, yet there is a wide breadth of legal

topics for discussion and education within the psychedelics law field that are beneficial to attorneys, law students, legislators, the WSBA and the public. In Washington currently, certain psychedelic compounds are legal for use in medicinal purposes, such as the use of ketamine. The city of Seattle has decriminalized noncommercial cultivation, possession, and consumption of psilocybin mushrooms, ayahuasca, ibogaine and non-peyote-derived mescaline, and the section expects that other municipalities will follow. Federal litigation regarding psychedelics applicability in right to try laws is currently ongoing. Further, both Oregon and Colorado have legalized certain psychedelic compounds with regulatory models for cultivation and distribution; and, although Washington State has not passed legislation similar to that passed in Oregon and Colorado, similar bills have been presented to the legislature in recent years, and the section recognizes a need to keep practitioners, the bar, and the public informed of such bills and any related legislative action.

Background

The Board approved the Cannabis Law Section in 2017, and this proposal to expand the subject matter scope of the section is a new request. The section is not aware of the Board taking a position on this issue before.

Community Input

The section sent out a survey questionnaire to its membership, seeking their input on a potential expansion of the section’s subject matter discipline and the results were overwhelmingly in favor of expansion. The questionnaire was sent to all section members who have subscribed to the listserv, and twenty-six percent (26%) of the membership responded. The section received the following responses:

<b>ANSWER CHOICES</b>	<b>RESPONSES</b>
No, the Cannabis Law Section should limit its subject matter to Cannabis related topics	10.53% 2
Yes, the Cannabis Law Section should broaden its subject matter to include psychedelic law	21.05% 4
Yes, the Cannabis Law Section should broaden its subject matter to include alcoholic beverage law	0.00% 0
Yes, the Cannabis Law Section should broaden its subject matter to include both psychedelic law and alcoholic beverage law	68.42% 13
<b>TOTAL</b>	<b>19</b>

A quorum of the section’s executive committee unanimously approved the expansion of subject matter scope and approved the associated bylaw amendments in a special meeting held on November 21, 2022.

There is no indication that expanding the subject matter of our section will negatively affect traditionally underrepresented or marginalized groups. In fact, the section is seeking to provide a forum for the exchange of topics, information and ideas related to practice areas in which practitioners of these subjects have largely been left out of section representation to date. The section anticipates that a wider member base will provide an opportunity to increase diversity within the section itself and will aid the section’s efforts to increase equity within the executive committee by involving practitioners from a broader member base and within multiple practice areas. The section anticipates that a broader membership base will give the section a pool of participants from

more diverse backgrounds and with diverse ideas to engage with the section and guide the future of the section for the benefit of its members and the public.

There is not currently a section that includes the practices of liquor law and psychedelics law in its core topic. Although occasional CLE programming has been developed by both the WSBA and by sections designed for attorneys with an interest in liquor law, very little programming, if any, has been developed by the WSBA or its sections for attorneys interested in psychedelics law.

The increased section membership will likely generate revenue for that section that can be utilized to provide topic specific programming and events valuable to its members. The section does not anticipate a particular budget for this expansion or the necessity of staff time, except for staff time in implementing section programming.

Attachments

*Proposed Amended Bylaws for the Cannabis Law Section in both clean and red format.*

**WSBA RISK ANALYSIS:** *This section is to be completed by the Office of General Counsel, with input from the proposing entity or individual.*

**Requested Action:** The Board of Governors is asked to approve changes to the Cannabis Law Section’s name, purpose, and bylaws.

**Bylaw Requirements:** WSBA Sections must (1) have a purpose that is within the purpose of the WSBA, and (2) have bylaws that are consistent with the WSBA Bylaws. (WSBA Bylaws Article XI.A and E). Sections that have less than 75 voting members for two consecutive years will be automatically placed on the BOG agenda for a “viability review.” The BOG has the discretion to retain a section despite what might otherwise be considered to be a lack of viability when in the BOG’s opinion the section is carrying on the work of the Bar as defined in these Bylaws, and the work is of value to the legal profession. (WSBA Bylaws Article XI.L.2)

**Risk Identification and Analysis:** Broadening the section’s focus appears to be within the WSBA Bylaws and supports the purpose of sections. I note that the Oregon State Bar has a Cannabis and Psychedelics Law Section. The risks of approving the change appear to be minimal. The risk of not approving the change may mean that the section cannot continue to exist. The section currently has less than the 75-member threshold.

**WSBA FISCAL ANALYSIS:** *This section is to be completed by the Finance Department, with input from the proposing entity or individual.*

The Cannabis Law Section currently charges an annual dues rate of \$25.00 per member, has a FY22 fund balance of \$3,552.68, and a FY23 budgeted net income of \$509. The proposed action could result in increased section membership and corresponding direct expenses for providing programmatic benefits to section members, and increased expenses for WSBA Per-Member Charge costs (\$17.66 per member for FY23). There is also potential for the development of CLE program(s) opportunities by expanding the scope of the section’s practice area which can result in net income or loss, depending on the type of CLE programming. Mini-CLE programs are designed for sections as a free or low-cost member benefit that offer no more than two CLE credits and tuition is limited to \$35 (usually free to section members). This programming option could generate additional revenue from registrations and increased program expense. If the section was to provide longer CLE programming (typically half or full day CLEs, mid-year or annual conferences), the dollar amount of net income would typically be greater than that incurred from holding a Mini-CLE. These types of section programs typically produce an income; in FY22, sections earned a total of \$234,224 in income on 61 programs.

**WSBA EQUITY ANALYSIS:** *This section is to be completed by the Equity and Justice Team, with input from the proposing entity or individual.*

The recommendation to change the name does not present any equity concerns. However, while the Cannabis Law Section’s work to expand the membership base might help to expand their member base, the expansion alone is unlikely to increase diversity within the section without intentional recruitment and engagement of underrepresented and marginalized members. The Equity & Justice Team recommends developing a plan to recruit and engage more intentionally with people who might be directly and/or disproportionately impacted by the section’s work and interests. In addition, we recommend thinking about how the section can center the members of the public who have been disproportionately targeted by laws related to cannabis, psychedelics, and liquor.



# WASHINGTON STATE BAR ASSOCIATION

## LIQUOR, CANNABIS, AND PSYCHEDELICS LAW SECTION

### Bylaws

Approved by the WSBA Board of Governors December 12, 2022

#### ARTICLE I. IDENTIFICATION

**1.1 NAME and CREATION.**

The name of this Section shall be the Liquor, Cannabis, and Psychedelics Law Section (the "Section"). The Section is established pursuant to the Bylaws of the Washington State Bar Association (the "Bar").

**1.2 PURPOSES.**

The purposes of the Section shall be to:

- A. provide continuing legal and other education for its members in areas of common interest to legal professionals interested in cannabis, psychedelics, and/or liquor law;
- B. provide opportunities for Section members to become better acquainted with other legal professionals with similar interests;
- C. provide services including education and networking for students interested in some of the fastest growing new practices of law and updates to the long established practice of liquor law;
- D. provide a forum for the exchange of ideas and discussion about issues of common interest to Section members;
- E. provide advice to the Bar, as requested, on proposed legislation, court rules, and other matters;
- F. provide resources and education to legislators and regulators; and
- G. undertake such other services that may be of benefit to the public and the Bar.

**1.3 LIMITATIONS.**

These bylaws are adopted subject to the applicable Washington statutes and the Bylaws of the Bar.

**1.4 PRINCIPAL OFFICE.**

The principal office of the Section shall be maintained in the offices of the Bar.

**1.5 FISCAL YEAR.**

The fiscal year of the Section shall coincide with that of the Bar.

#### ARTICLE II. MEMBERS AND SUBSCRIBERS

**2.1 MEMBERS.**

Any Active member of the Bar, Emeritus Pro Bono member (APR 8(e)), Judicial member, House Counsel

(APR 8(f)), professor at any Washington law school (whether licensed in Washington or not), or any lawyer who is a full time lawyer in a branch of the military who is stationed in Washington but not licensed in Washington, may be a voting member of the Section and eligible for election to office in the Section upon payment of annual Section dues.

## **2.2 SUBSCRIBERS.**

Any student enrolled in a law school in the State of Washington may enroll as a subscriber upon request and payment of the applicable annual dues charged to law students. Other permitted subscribers include: WSBA members on inactive status, lawyers and other legal professionals not licensed or admitted in Washington, and members of the public. Subscribers have no right to vote as a member. Subscribers shall be entitled to receive publications, such as the newsletter, made available to all Section members and to attend continuing legal education seminars and other events sponsored by the Section upon payment of the applicable fees.

## **2.3 SECTION DUES.**

Dues shall be paid annually in an amount to be established by the Executive Committee and approved by the Board of Governors of the Bar. Any person who fails to pay the annual dues shall cease to be a member of the Section. Changes in dues shall be effective for the fiscal year immediately following such determination.

### **ARTICLE III. MEETINGS OF THE MEMBERSHIP**

#### **3.1 EDUCATION.**

The Section shall annually sponsor at least one Continuing Legal Education program, and periodically shall publish a Section Newsletter, for the benefit of Section Members, Subscribers, and other members of the Bar and the public, covering topics relevant to the Section's purposes.

#### **3.2 ANNUAL MEETING.**

The annual meeting of the Section shall be held in conjunction with the continuing legal education program sponsored by the Section, or at another time as determined by the Executive Committee of the Section. The Chair of the Section shall cause notice of the annual meeting to be posted on the WSBA website, published in the Section newsletter, or e-mailed to each member of the Section at least thirty (30) days in advance of the annual meeting.

#### **3.3 QUORUM; CONTROLLING VOTE.**

The members of the Section present at any annual or special meeting shall constitute a quorum for the transaction of business. A majority vote of the members present shall be required to approve any business brought before such meeting.

### **ARTICLE IV. THE EXECUTIVE COMMITTEE**

#### **4.1 POWERS AND DUTIES.**

The Executive Committee shall be vested with the powers and duties necessary for the administration of the affairs of the Section and shall perform duties assigned to it by the Board of Governors of the Bar. The Executive Committee shall have the responsibility to establish other committees of the Section.

#### **4.2 COMPOSITION.**

The Executive Committee shall be composed of the following persons:

A. Officers

1. Chair. The Chair presides at all meetings of the Section and executive committee, and shall have such other executive powers and perform such other duties as are consistent with the Bar and Section bylaws.

2. Secretary. The Secretary shall take minutes at each meeting of the Section and executive committee, and provide approved minutes to the Bar for publication and record retention. In addition, the Secretary shall perform such other duties as may be assigned to him or her by the Chair or the Executive Committee.
3. Treasurer. The Treasurer shall work with the Bar to ensure that the Section complies with Bar fiscal policies and procedures, work with the Bar to prepare the Section's annual budget, and review the Section's monthly financial statements for accuracy and comparison to budget. In addition, the Treasurer shall perform such other duties as may be assigned to him or her by the Chair or the Executive Committee.
4. Immediate Past Chair.

B. At-Large Members. At-Large members of the Executive Committee will be voting members.

C. Executive Committee Members may hold more than one office at a time.

#### 4.3 **TERM.**

The term of each member of the Executive Committee shall be two (2) years, beginning on October 1. No person may serve as an At-Large member of the Executive Committee for more than two (2) sequential terms; provided that a person who is appointed to fill the incomplete term of a predecessor may serve two full additional terms and a person who is elected as Chair may continue to serve until the conclusion of the term in which he or she becomes the immediate past Chair.

#### 4.4 **REMOVAL.**

Any member of the executive committee may be removed by a two-thirds majority vote of the executive committee. Grounds for removal include, but are not limited to, regular absence from executive committee meetings and events, failure to perform duties, unprofessional or discourteous conduct or whenever, in the executive committee's judgment, the executive committee member is not acting in the best interest of the Section membership.

#### 4.5 **CONTROLLING VOTE.**

Action of the Executive Committee shall be determined by majority vote of the Executive Committee, once a quorum has been established.

#### 4.6 **MEETINGS OF THE EXECUTIVE COMMITTEE.**

The annual meeting of the Executive Committee shall be held following the annual meeting of Members. Other meetings shall be held at the time and place as may be designated by the Chair or a majority of the Executive Committee. The Executive Committee is expected to conduct a minimum of three meetings annually.

#### 4.7 **COMPENSATION.**

No salary or compensation for services shall be paid to any member of the Section Executive Committee or member of any committee. Reimbursement may be allowed for travel and other out-of-pocket expenses for members of the Section Executive Committee and members of all Section standing and special committees pursuant to the Bar expense reimbursement policy.

### **ARTICLE V. ELECTIONS**

#### 5.1 **NOMINATIONS.**

Nominations and elections for open Executive Committee positions will be held between March and May. The Chair shall appoint a Nominating Committee to nominate one or more persons for each open Executive Committee position. The Nominating Committee shall report its nominees to the Executive Committee for approval prior to the annual meeting. Other nominations for the same positions may be made from the floor at the annual meeting. Individuals may nominate themselves.

5.2 **ELECTIONS.**

The Bar will administer the elections by electronic means and certify results, unless the Section develops its own equivalent electronic election process. In the event of a tie, the winner will be determined by a random tie breaker chosen by the Executive Committee.

5.3 **APPOINTMENTS TO FILL VACANCIES.**

The Executive Committee shall appoint, by a majority vote, members to fill vacancies on the Executive Committee. When a member is appointed to fill a vacancy in an unexpired term, the member shall do so until the next election when an individual shall be elected to serve the remainder of the vacated term.

**ARTICLE VI. COMMITTEES**

6.1 **PURPOSE.**

The purpose of the Committees shall be to further the interests of the Section within their particular areas of expertise, in coordination with and subject to the control of the Executive Committee.

6.2 **CONTINUING LEGAL EDUCATION COMMITTEE.**

The Section shall have a permanent Continuing Legal Education Committee which shall be charged with the duty of organizing and conducting the Section's annual Continuing Legal Education program.

6.3 **NOMINATING COMMITTEE.**

The Section shall have a nominating committee consisting of no less than three (3) Section members appointed annually by the Chair or executive committee. At least one member of the nominating committee should not be a current member of the Section executive committee

6.4 **ADDITIONAL COMMITTEES.**

The Executive Committee may form committees to perform such duties as may be determined by the Executive Committee. Such committees may be permanent committees or formed to perform specific tasks. All committees shall report to the Chair and shall provide regular reports of their activities to the Executive Committee.

6.5 **COMPOSITION AND GOVERNANCE OF COMMITTEES.**

The composition of each committee shall be determined by the Executive Committee who shall appoint a Chair to manage the work of the committee. Committee members may include members of the Section who are not members of the Executive Committee. All committee members shall serve at the pleasure of the Executive Committee.

**ARTICLE VII. AMENDMENTS**

These bylaws may be amended at any annual meeting of the Section. These bylaws may also be amended at any regular or special meeting of the Executive Committee; provided that written notice describing the proposed amendments is provided to each Executive Committee member at least seven (7) days in advance of the meeting. No amendment of these bylaws will be effective until approved by the Board of Governors of the Bar.

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First amended bylaws adopted on the 12<sup>th</sup> day of December, 2022.

# WASHINGTON STATE BAR ASSOCIATION

## LIQUOR, CANNABIS, AND PSYCHEDELICS LAW SECTION

### Bylaws

Approved by the WSBA Board of Governors January 13, 2023

#### ARTICLE I. IDENTIFICATION

**1.1 NAME and CREATION.**

The name of this Section shall be the Liquor, Cannabis, and Psychedelics Law Section (the "Section"). The Section is established pursuant to the Bylaws of the Washington State Bar Association (the "Bar").

**1.2 PURPOSES.**

The purposes of the Section shall be to:

- A. provide continuing legal and other education for its members in areas of common interest to legal professionals interested in cannabis, psychedelics, and/or liquor law;
- B. provide opportunities for Section members to become better acquainted with other legal professionals with similar interests;
- C. provide services including education and networking for students interested in some of the fastest growing new practices of law and updates to the long-established practice of liquor law;
- D. provide a forum for the exchange of ideas and discussion about issues of common interest to Section members;
- E. provide advice to the Bar, as requested, on proposed legislation, court rules, and other matters;
- F. provide resources and education to legislators and regulators; and
- G. undertake such other services that may be of benefit to the public and the Bar.

**1.3 LIMITATIONS.**

These bylaws are adopted subject to the applicable Washington statutes and the Bylaws of the Bar.

**1.4 PRINCIPAL OFFICE.**

The principal office of the Section shall be maintained in the offices of the Bar.

**1.5 FISCAL YEAR.**

The fiscal year of the Section shall coincide with that of the Bar.

#### ARTICLE II. MEMBERS AND SUBSCRIBERS

**2.1 MEMBERS.**

Any Active member of the Bar, Emeritus Pro Bono member (APR 8(e)), Judicial member, House Counsel

(APR 8(f)), professor at any Washington law school (whether licensed in Washington or not), or any lawyer who is a full time lawyer in a branch of the military who is stationed in Washington but not licensed in Washington, may be a voting member of the Section and eligible for election to office in the Section upon payment of annual Section dues.

## **2.2 SUBSCRIBERS.**

Any student enrolled in a law school in the State of Washington may enroll as a subscriber upon request and payment of the applicable annual dues charged to law students. Other permitted subscribers include: WSBA members on inactive status, lawyers and other legal professionals not licensed or admitted in Washington, and members of the public. Subscribers have no right to vote as a member. Subscribers shall be entitled to receive publications, such as the newsletter, made available to all Section members and to attend continuing legal education seminars and other events sponsored by the Section upon payment of the applicable fees.

## **2.3 SECTION DUES.**

Dues shall be paid annually in an amount to be established by the Executive Committee and approved by the Board of Governors of the Bar. Any person who fails to pay the annual dues shall cease to be a member of the Section. Changes in dues shall be effective for the fiscal year immediately following such determination.

### **ARTICLE III. MEETINGS OF THE MEMBERSHIP**

#### **3.1 EDUCATION.**

The Section shall annually sponsor at least one Continuing Legal Education program, and periodically shall publish a Section Newsletter, for the benefit of Section Members, Subscribers, and other members of the Bar and the public, covering topics relevant to the Section's purposes.

#### **3.2 ANNUAL MEETING.**

The annual meeting of the Section shall be held in conjunction with the continuing legal education program sponsored by the Section, or at another time as determined by the Executive Committee of the Section. The Chair of the Section shall cause notice of the annual meeting to be posted on the WSBA website, published in the Section newsletter, or e-mailed to each member of the Section at least thirty (30) days in advance of the annual meeting.

#### **3.3 QUORUM; CONTROLLING VOTE.**

The members of the Section present at any annual or special meeting shall constitute a quorum for the transaction of business. A majority vote of the members present shall be required to approve any business brought before such meeting.

### **ARTICLE IV. THE EXECUTIVE COMMITTEE**

#### **4.1 POWERS AND DUTIES.**

The Executive Committee shall be vested with the powers and duties necessary for the administration of the affairs of the Section and shall perform duties assigned to it by the Board of Governors of the Bar. The Executive Committee shall have the responsibility to establish other committees of the Section.

#### **4.2 COMPOSITION.**

The Executive Committee shall be composed of the following persons:

A. Officers

1. Chair. The Chair presides at all meetings of the Section and executive committee, and shall have such other executive powers and perform such other duties as are consistent with the Bar and Section bylaws.

2. Secretary. The Secretary shall take minutes at each meeting of the Section and executive committee, and provide approved minutes to the Bar for publication and record retention. In addition, the Secretary shall perform such other duties as may be assigned to him or her by the Chair or the Executive Committee.
3. Treasurer. The Treasurer shall work with the Bar to ensure that the Section complies with Bar fiscal policies and procedures, work with the Bar to prepare the Section's annual budget, and review the Section's monthly financial statements for accuracy and comparison to budget. In addition, the Treasurer shall perform such other duties as may be assigned to him or her by the Chair or the Executive Committee.
4. Immediate Past Chair.

B. At-Large Members. At-Large members of the Executive Committee will be voting members.

C. Executive Committee Members may hold more than one office at a time.

#### 4.3 **TERM.**

The term of each member of the Executive Committee shall be two (2) years, beginning on October 1. No person may serve as an At-Large member of the Executive Committee for more than two (2) sequential terms; provided that a person who is appointed to fill the incomplete term of a predecessor may serve two full additional terms and a person who is elected as Chair may continue to serve until the conclusion of the term in which he or she becomes the immediate past Chair.

#### 4.4 **REMOVAL.**

Any member of the executive committee may be removed by a two-thirds majority vote of the executive committee. Grounds for removal include, but are not limited to, regular absence from executive committee meetings and events, failure to perform duties, unprofessional or discourteous conduct or whenever, in the executive committee's judgment, the executive committee member is not acting in the best interest of the Section membership.

#### 4.5 **CONTROLLING VOTE.**

Action of the Executive Committee shall be determined by majority vote of the Executive Committee, once a quorum has been established.

#### 4.6 **MEETINGS OF THE EXECUTIVE COMMITTEE.**

The annual meeting of the Executive Committee shall be held following the annual meeting of Members. Other meetings shall be held at the time and place as may be designated by the Chair or a majority of the Executive Committee. The Executive Committee is expected to conduct a minimum of three meetings annually.

#### 4.7 **COMPENSATION.**

No salary or compensation for services shall be paid to any member of the Section Executive Committee or member of any committee. Reimbursement may be allowed for travel and other out-of-pocket expenses for members of the Section Executive Committee and members of all Section standing and special committees pursuant to the Bar expense reimbursement policy.

### **ARTICLE V. ELECTIONS**

#### 5.1 **NOMINATIONS.**

Nominations and elections for open Executive Committee positions will be held between March and May. The Chair shall appoint a Nominating Committee to nominate one or more persons for each open Executive Committee position. The Nominating Committee shall report its nominees to the Executive Committee for approval prior to the annual meeting. Other nominations for the same positions may be made from the floor at the annual meeting. Individuals may nominate themselves.

5.2 **ELECTIONS.**

The Bar will administer the elections by electronic means and certify results, unless the Section develops its own equivalent electronic election process. In the event of a tie, the winner will be determined by a random tie breaker chosen by the Executive Committee.

5.3 **APPOINTMENTS TO FILL VACANCIES.**

The Executive Committee shall appoint, by a majority vote, members to fill vacancies on the Executive Committee. When a member is appointed to fill a vacancy in an unexpired term, the member shall do so until the next election when an individual shall be elected to serve the remainder of the vacated term.

**ARTICLE VI. COMMITTEES**

6.1 **PURPOSE.**

The purpose of the Committees shall be to further the interests of the Section within their particular areas of expertise, in coordination with and subject to the control of the Executive Committee.

6.2 **CONTINUING LEGAL EDUCATION COMMITTEE.**

The Section shall have a permanent Continuing Legal Education Committee which shall be charged with the duty of organizing and conducting the Section's annual Continuing Legal Education program.

6.3 **NOMINATING COMMITTEE.**

The Section shall have a nominating committee consisting of no less than three (3) Section members appointed annually by the Chair or executive committee. At least one member of the nominating committee should not be a current member of the Section executive committee

6.4 **ADDITIONAL COMMITTEES.**

The Executive Committee may form committees to perform such duties as may be determined by the Executive Committee. Such committees may be permanent committees or formed to perform specific tasks. All committees shall report to the Chair and shall provide regular reports of their activities to the Executive Committee.

6.5 **COMPOSITION AND GOVERNANCE OF COMMITTEES.**

The composition of each committee shall be determined by the Executive Committee who shall appoint a Chair to manage the work of the committee. Committee members may include members of the Section who are not members of the Executive Committee. All committee members shall serve at the pleasure of the Executive Committee.

**ARTICLE VII. AMENDMENTS**

These bylaws may be amended at any annual meeting of the Section. These bylaws may also be amended at any regular or special meeting of the Executive Committee; provided that written notice describing the proposed amendments is provided to each Executive Committee member at least seven (7) days in advance of the meeting. No amendment of these bylaws will be effective until approved by the Board of Governors of the Bar.

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First amended bylaws adopted on the 13<sup>th</sup> day of January, 2023.



**TO:** WSBA Board of Governors  
**CC:** Terra Nevitt, Executive Director  
**FROM:** Donya Burns, ELUL Section Chair  
**STAFF CONTACT:** Carolyn MacGregor, Sections Program Specialist  
Julianne Unite, Member Services and Engagement Manager  
Kevin Plachy, Advancement Department Director  
**DATE:** December 20, 2022  
**RE:** Proposed Amendment to ELUL Section Bylaws regarding ELUL Editorial Positions

**CONSENT:** Environmental and Land Use Law Section desires to amend section bylaws to accurately reflect its online publication and editor positions.

The Environmental and Land Use Law Section requests a bylaw amendment to accurately describe its online publication and editor-positions to reflect the publication is an “article” rather than a “newsletter.”

#### Background

As a result of the change from a published newsletter publication to a more active website, the Environmental and Land Use Section “newsletter” is no longer a newsletter.

On December 14, 2022, the ELUL Executive Committee voted to approve a change so that the website articles would be called “articles,” rather than “newsletter.” This proposed bylaw amendment will change the position titles for our “newsletter editors” in the ELUL Section Bylaws to ensure consistency with the website and to accurately describe the position.

#### **Redline Proposed Bylaw Amendment – Section 4.2 h.**

- h. **Article ~~Newsletter~~ Editor.** The editor or editors of the ELUL online articles ~~Newsletter~~ shall be non-voting ex officio members of the executive committee and shall perform the duties of editor and developer of the ELUL online articles ~~Newsletter~~ and may perform other duties as agreed upon with the executive committee.

#### **Bylaw Section (if approved)**

- h. **Article Editor.** The editor or editors of the ELUL online articles shall be non-voting ex officio members of the executive committee and shall perform the duties of editor and developer of the ELUL online articles and may perform other duties as agreed upon with the executive committee.

**WSBA RISK ANALYSIS:**

The Section asks the BOG to approve section bylaw changes replacing the word “newsletter” with the word ‘article” and “online article.” These words appear in the description of the Article Editor position. This change does not appear to create risk to the WSBA.

**WSBA FISCAL ANALYSIS:**

The fiscal impact to WSBA resulting from the proposed changes to Section bylaws is limited to the amount of staff time used to incorporate amendments in Section records. The staff time that would be allocated to this work is included in the overall duties of existing WSBA staff and would not require additional staff or allocation of resources from other internal sources.

**WSBA EQUITY ANALYSIS:**

The proposed change does not appear to raise any equity concerns.

Attachments

ELUL\_bylaws\_redline.docx

ELUL\_bylaws\_clean.docx

# WASHINGTON STATE B A R A S S O C I A T I O N

## ENVIRONMENTAL AND LAND USE LAW SECTION

### Bylaws

As last amended and approved by the  
Washington State Bar Association Board of Governors on Jan. 13, 2022,  
and including 2017 amendments.

#### ARTICLE I. IDENTIFICATION

- 1.1 **Creation.** The Environmental and Land Use Law Section of the Washington State Bar, (the "Section") was established pursuant to the Bylaws of the Washington State Bar (the "Bar").
- 1.2 **Purposes.** The purposes of the Section shall be:
  - a. To provide a formal association of attorneys, other professionals, and law students who share a common focus and interest in the practice of environmental or land use law;
  - b. To provide the opportunity and forum for the interchange of ideas in the areas of environmental and land use law and the protection and enhancement of the quality of the environment;
  - c. To initiate, implement, and support projects that are relevant to environmental and land use law and that contribute to the protection and enhancement of the quality of the environment;
  - d. To support the profession of environmental and land use law by providing education and support to Bar members, the public and, in particular, those aspiring to practice law in this field; and
  - e. To undertake such other service as may be of benefit to the members, the legal profession, and the public.
- 1.3 **Limitations.** These bylaws have been adopted subject to applicable Washington statutes and court rules, and the Bylaws of the Bar.
- 1.4 **Principal Office.** The Principal Office of the Section shall be maintained in the offices of the Bar.
- 1.5 **Fiscal Year.** The fiscal year of the Section shall coincide with that of the Bar.

## ARTICLE II. MEMBERSHIP

- 2.1 **Members.** Any of the following members in good standing may be enrolled as a voting member of the Section ("Voting Member") by paying annual Section dues:
- a. Active members of the Bar;
  - b. Emeritus Pro Bono members;
  - c. Judicial members;
  - d. House Counsel under APR 8(f);
  - e. Professors at a Washington law school (whether licensed in Washington or not); and
  - f. Any lawyer who is a full time lawyer in a branch of the military who is stationed in Washington, but not licensed in Washington.
- 2.2 **Subscribers.** Inactive members of the Bar and members of the public may be enrolled as subscribers of the Section ("Subscribers") by paying the annual Section dues. Law students may be enrolled as subscribers by paying the annual Section dues established by the Bar. Subscribers shall not have voting rights.
- 2.3 **The Membership.** Voting Members and Subscribers enrolled as provided in Section 2.1 and 2.2 shall constitute the membership of the Section.
- 2.4 **Dues.** Dues in the amount approved by the Board of Governors of the Bar shall be paid annually. Any person who fails to pay the annual dues shall cease to be a Voting Member or Subscriber, as applicable, of the Section.

## ARTICLE III. MEETINGS OF THE MEMBERSHIP

- 3.1 **Annual Membership Meeting.** The annual meeting of the Section shall be held at a time and place designated by the executive committee to coincide with the Section midyear conference. Notice of the meeting shall be provided to the membership with the conference brochure and posted on the WSBA website.
- 3.2 **Quorum.** All Voting Members present at any meeting of the membership shall constitute a quorum for the transaction of business by the membership.
- 3.3 **Controlling Vote.** Action of the Section shall be by majority vote of the Voting Members present.
- 3.4 **Agenda.** The business to be transacted at the annual meeting shall include the nomination of candidates for At-Large executive committee members and the Chair-elect.
- 3.5 **Special Meetings.** Special meetings of the membership of the Section may be called by the Chair at such time and place as the executive committee may determine.

#### ARTICLE IV. THE EXECUTIVE COMMITTEE

- 4.1 **Powers and Duties.** The executive committee shall be vested with the powers and duties necessary for the administration of the affairs of the Section and perform duties assigned to it by the Board of Governors.
- 4.2 **Composition and Officers.** The executive committee shall be composed of the following persons:
- a. The Chair. The Chair shall preside at all meetings of the Section and of the executive committee. The Chair shall submit to the Board of Governors of the Bar an annual report of the work of the Section for the then-past year. The Chair shall perform such other duties as usually pertain to this office or as may be delegated by the executive committee.
  - b. The Chair-elect. Upon the Chair's death, resignation, or refusal to act, the Chair-elect shall perform the duties of the Chair for the remainder of the Chair's term. If the Chair is otherwise unable to act, the Chair-elect shall perform the duties of the Chair for as long as the Chair's disability continues. The Chair-elect shall also perform such other duties as may be delegated by the executive committee.
  - c. The Immediate Past-Chair (last retiring Chair). The Immediate Past-Chair shall perform such duties as may be delegated by the executive committee.
  - d. Secretary. The Secretary shall administer the meeting schedule of the executive committee, take minutes at each meeting of the Section and of the executive committee and provide approved minutes to the Bar for publication and record retention. In conjunction with the Chair and as authorized by the executive committee, the Secretary shall attend generally to the business of the Section.
  - e. Treasurer. The Treasurer shall keep a true record of all accounts of the Section, shall work with the Bar to ensure that the Section complies with Bar fiscal policies and procedures, shall work with the Bar to prepare the Section's annual budget, and shall review the Section's monthly financial statements for accuracy and comparison to budget. In conjunction with the Chair and as authorized by the executive committee, the Treasurer shall attend generally to the business of the Section. At the option of the executive committee, the offices of Secretary and Treasurer may be combined.
  - f. At-Large members. There shall be seven At-Large members. At-Large members shall perform such duties as may be delegated by the executive committee and may serve as Secretary or Treasurer by appointment of the executive committee pursuant to Section 5.1.
  - g. Young Lawyer Liaison. The Young Lawyer Liaison will be a person from the WSBA Young Lawyer Liaison program and shall be a member of the executive committee for the term as defined by the Washington Young Lawyers Committee (WYLC). The Young Lawyer Liaison shall perform duties as may be delegated by the executive committee as may fit the purpose of the WYLC.

h. Article Editor. The editor or editors of the ELUL online articles shall be non-voting ex officio members of the executive committee and shall perform the duties of editor and developer of the ELUL online articles and may perform other duties as agreed upon with the executive committee.

4.3 **Quorum; Controlling Vote.** A majority of the existing executive committee members, whether present in person, by telephone, or by videoconference, shall constitute a quorum. Action of the executive committee shall be by majority vote of the executive committee members present after a quorum has been established. Executive committee members may only vote by email in accordance with Article VII of the Bar Bylaws.

4.4 **Meetings.** The executive committee will have regularly scheduled meetings that are open to the public. All persons will be permitted to attend any meeting, except as otherwise provided in these bylaws, the Bar Bylaws or under court rules. Meetings may be held in person, by telephone conference or videoconference. The date, time, location, and any other information necessary to attend will be posted on the WSBA Section website a reasonable amount of time in advance of each meeting. Special meetings shall be held at such time and place as may be designated by the Chair or a majority of the executive committee.

#### ARTICLE V. ELECTIONS

5.1 **Elective Officers.** Each year the Voting Members shall elect a Chair-elect and the number of At-Large executive committee members as necessary to fill expiring terms and vacancies. The positions of Secretary and Treasurer shall not be separately elected, but appointed by the executive committee from the elected At-Large positions as necessary to fill those roles.

5.2 **Chair.** The Chair-elect shall automatically accede to the office of the Chair. In the event the office of the Chair-elect shall be vacant, then a Chair shall also be elected by the Voting Members. The Chair shall automatically accede to the office of Immediate Past Chair at the end of the Chair's term.

5.3 **Nominations.** The executive committee annually shall compile a list of Voting Members of the Section who are not currently members of the executive committee and who may serve on a nominating committee. The Immediate Past-Chair shall appoint a nominating committee consisting of not fewer than three persons from that list who are willing to serve on the nominating committee. The nominating committee shall make and report nominations at the annual meeting of the Section for the office of the Chair-elect and any open At-Large positions to succeed those whose terms will expire at the end of the current fiscal year. In formulating its report of nominations, the nominating committee shall maintain a view toward providing representation on the executive committee that reflects the geographic, practice-area, practice-type, ethnic, gender, and other factors of diversity of the membership.

Other nominations may be made from the floor at the annual meeting.

All candidates accepting the nomination of the nomination committee shall provide candidate statements to the Bar one week prior to the annual meeting. Candidates accepting a nomination from the floor of the annual meeting shall provide candidate statements to the Bar within three business days from the close of the midyear conference. All candidates shall apply through an

electronic application process administered by the Bar.

- 5.4 **Voting.** Nominations and elections for open executive committee positions shall be held in March, April or May each year. Elections will be conducted electronically, and will either be administered by the Bar or by the Section, which may develop its own equivalent electronic election process that complies with the Bar Bylaws. Successful candidates for At-Large positions will be those who receive the most votes and the second-most votes, etc. as necessary by the number of open positions.
- 5.5 **Term of Office.** All executive committee positions will begin October 1 each year. The offices of Chair-elect, Chair and Immediate Past-Chair shall each have a term of one year. The term for each At-large position shall be three years, staggered so that at least two shall expire each year. There is no limit to the number of terms that may be held.
- 5.6 **Interim Appointments.** In the event of a vacancy during the interim between annual elections, the executive committee shall appoint, by majority vote, a Voting member to fill the vacancy. When such a member is appointed to fill a vacancy in an unexpired term, the member will serve until next annual election when an individual will be elected to serve the remainder of the vacated term.

#### **ARTICLE VI. SUBSTANTIVE RESPONSIBILITIES**

The Chair shall appoint committees to perform such duties and exercise such powers as the executive committee may direct.

#### **ARTICLE VII. AMENDMENTS**

These bylaws may be amended by majority vote of the Voting Members present at any annual meeting of the Section or by majority vote of the voting executive committee members present at an executive committee meeting once a quorum is established. No amendment so adopted shall become effective until approved by the Board of Governors of the Bar.

First adopted on September 6, 1973, amended as approved by the Membership on October 14, 1999 (effective December 3, 1999), amended as approved by the Membership May 19, 2007 (effective July 27, 2007), amended as approved by the Membership May 2, 2014 (effective June 6, 2014), amended as approved by the Executive Committee on June 6, 2017 (effective July 27, 2017), and amended as approved by the Executive Committee on November 17, 2021 (effective January 13, 2022).

# WASHINGTON STATE B A R A S S O C I A T I O N

## ENVIRONMENTAL AND LAND USE LAW SECTION

### Bylaws

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  - b. To provide the opportunity and forum for the interchange of ideas in the areas of environmental and land use law and the protection and enhancement of the quality of the environment;
  - c. To initiate, implement, and support projects that are relevant to environmental and land use law and that contribute to the protection and enhancement of the quality of the environment;
  - d. To support the profession of environmental and land use law by providing education and support to Bar members, the public and, in particular, those aspiring to practice law in this field; and
  - e. To undertake such other service as may be of benefit to the members, the legal profession, and the public.
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**TO:** WSBA Board of Governors  
**CC:** Terra Nevitt, Executive Director  
**FROM:** Jason Schwarz, Chair of the Counsel on Public Defense  
Maia Vanyo, Vice-Chair of the Counsel on Public Defense  
**DATE:** 12/5/22  
**RE:** Seeking BOG Approval for Counsel on Public Defense Proposed Charter Amendments

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**ACTION: Seeking WSBA Board of Governor’s Approval of the Counsel on Public Defense Proposed Charter Amendments**

We are requesting an update to the Council on Public Defense (CPD) Charter to better reflect the work we currently do and align the CPD’s structure with the WSBA Board of Governors. New CPD members requested this review as means to provide more clarity to the role of the CPD. The updated Charter better reflects the realities of the work done and the professionals with whom we collaborate. The BOG has approved various revisions to the Charter over the years at the CPD’s request.

Background

New CPD members initiated a conversation about the role of the Charter and a review workgroup was created to propose any changes. Largely the changes seek to reflect our real work, streamline some of the language, and amend the Charter to create a leadership structure that more aligns with the WSBA BOG. Changing the leadership structure will allow us to provide leadership continuity in multi-year projects and mentorship for new leaders. The revisions do not change the work of the CPD, but rather provide more clarity about the CPD’s role and responsibilities within public defense statewide.

Community Input

The CPD is a body composed of practicing public defense attorneys, public defense administrators, judges, prosecutors, impacted persons, and other community leaders. The updates to the Charter were vetted through the workgroup and unanimously approved by the CPD.

Information for Fiscal Analysis

*There are no impacts to the budget.*

Information for Equity Analysis

The CPD recommends caseload regulations for criminal and family law defense and aims to improve constitutionally effective public defense services in Washington. State and national data shows the

disproportionate impact of these legal systems on Black, Indigenous, and people of color. Changes in the Charter will have a limited direct impact on equity, but the restructuring acknowledges the work the CPD does and provides a continuity to the projects we undertake. The work of the Council, as reflected in the Charter, will continue to have an impact on equity in the legal system.

**WSBA RISK ANALYSIS:** *This section is to be completed by the Office of General Counsel, with input from the proposing entity or individual.*

*Action: Approve changes to the Council on Public Defense Charter.*

*Background: Councils are authorized by WSBA Bylaws Article IX.C. Councils are created by the Board of Governors to serve as advisory committees to the Board on matters and issues of particular import to the Bar. Council Charters should include the following information: (1) terms of appointment and (2) duties and tasks to be performed. Councils must submit annual reports to the BOG or Executive Director and work with WSBA staff to submit budget information during the budget development process.*

*Risk: The risk in approving the changes to the Charter appears to be minimal. The changes appear to clarify the appointment terms and duties and tasks, as required by the WSBA Bylaws.*

**WSBA FISCAL ANALYSIS:** *This section is to be completed by the Finance Department, with input from the proposing entity or individual.*

**WSBA EQUITY ANALYSIS:** *This section is to be completed by the Equity and Justice Team, with input from the proposing entity or individual.*

The proposed charter amendments which simply provide clarification and continuity to the work of the Council do not raise any equity concerns.

#### Attachments

*Council on Public Defense Charter Amendments*

# Charter: WSBA Council on Public Defense

(Revised ~~June 2020~~December 2022)

## Purpose and Mission

A WSBA Committee on Public Defense (~~"CPD"~~)—was established in 2004 to implement recommendations of the WSBA's Blue Ribbon Panel on Criminal Defense. Original membership was appointed by the President and confirmed by the Board of Governors. The ~~CPD's~~Council on Public Defense's recommendations were acted upon by the Board of Governors during FY 2007. One of these recommendations was that the ~~CPD~~Council on Public Defense be extended through December, 2008 to study, focus and follow-up on unfinished public criminal defense, dependency and civil commitment issues.

While the extended ~~CPD~~Council on Public Defense made significant progress on the issues identified in its charter, it became apparent that maintaining and improving constitutionally effective public defense services in Washington required an ongoing committee with a mandate broad enough to address both new and recurring public defense issues. Having found that the ~~CPD~~Council on Public Defense provides a unique and valuable forum for bringing together representatives of the bar, private and public criminal defense attorneys, current and former prosecutors, attorneys, the bench, elected officials and the public, the WSBA Board of Governors established the Council on Public Defense as an advisory committee of the WSBA.

The Council on Public Defense is charged with the following tasks:

1. Recommend amendments to and mechanisms to assure compliance with ~~"Standards for Public Defense Services" endorsed by the WSBA~~public defense standards and performance guidelines to the BOG and the Washington Supreme Court.
2. Promulgate "Right to Counsel" educational materials and programs for the public, including clients and community members, bench, public defense administrators, elected officials, and the bar concerning the constitutional right to counsel.
3. Develop "Best Practices" guidelines for public defense services contracts.
4. Address current issues relating to the provision of constitutional public defense services in Washington, including supporting efforts to ensure adequate funding is available.
5. Seek, review and recommend possible improvements in the criminal justice system which might impact public defense or the ability to provide public defense services.
6. ~~Examine experience with Washington Office of Public Defense pilot projects and other programs and public defense systems to improve the delivery of defense services in Washington.~~Improve delivery of defense services in Washington by examining and reporting on public defense systems and projects.

7. Develop recommendations concerning the most effective and appropriate statewide structure for the delivery and accountability for defense services.
8. ~~Continue to study and develop system improvement recommendations for the civil commitments process.~~ Evaluate and make recommendations for all practice areas for which counsel may be appointed.
9. ~~Develop further recommendations for indigent juvenile public defense.~~
10. ~~Evaluate and make recommendations regarding the implementation of the death penalty in Washington.~~
- 11.9.      Develop performance ~~standards-guidelines~~ for attorneys providing public defense services in criminal, juvenile offender, dependency, civil commitment, Becca and other cases to which counsel may be appointed.

MEMBERSHIP:

The Council on Public Defense is comprised of 23 voting members and up to ~~5-seven~~ emeritus members. Nominations are made by the entities listed below, with all appointments confirmed by the WSBA's Board of Governors. These members do not serve as official representatives of these entities, but rather are appointed based on their knowledge, expertise and a commitment to providing constitutional public defense services in Washington.

The Chair and Vice-Chair shall be appointed by the WSBA President-elect. Each shall serve a two-year term, with the Vice-Chair becoming Chair at the end of the second year and a new Vice-Chair appointed. Except as noted, the members of the Council shall be appointed for two-year terms and be eligible for reappointment for two additional two-year terms, totaling six years of service. The Chair may nominate up to ~~five-seven~~ former Council members whose eligibility for voting membership has expired, to serve as non-voting emeritus members for ~~one-two~~-year terms<sup>1</sup>. ~~The voting membership is as follows:~~

~~The Immediate Past Chair performs such duties as may be assigned by the Chair or the Council. The Immediate Past Chair will perform the duties of the Chair in the absence, inability, recusal, or refusal of the Chair and Vice-Chair. The Immediate Past Chair is not a voting member of the Council except when acting in the Chair's place at a meeting of the Council and then only if the vote will affect the result.~~

~~The voting membership is as follows:~~

**Core Members (~~Core Members have no term limits~~no term limits)**

- The Director of the State Office of Public Defense (~~a core member~~)
- The Director of the Washington Defender Association (~~a core member~~)
- One Washington Supreme Court Justice (~~a core member~~)

<sup>1</sup> Non-voting emeritus members are not eligible for WSBA expense reimbursements.

**Commented [JS1]:** Is the Immediate Past Chair a one year or two year position? Is this person a member, but non voting? The Charter doesn't define the immediate past chair as a position at all, but then assigns duties. You might want to clarify. I assume the immediate past chair is not one of the seven former Council members the Chair may nominate? Any way, this is just a little bit confusing to me.



### **Nominated by Outside Parties**

- One Superior Court judge, recommended by the Superior Court Judges Association
- One District or Municipal Court judge, recommended by the District and Municipal Court Judges Association
- Three public defenders, recommended by the Washington Defender Association
- One representative from each of the three Washington law schools, recommended by the Dean of the school
- One representative from civil legal services, recommended by the Access to Justice Board

### **Considered Through WSBA Application Process**

- Three current or former prosecutors/city attorneys, recommended by the Council chair, ~~V~~ice-Chair ~~and BOG~~and Board of Governors Liaisons
- Six at-large members, at least one of whom has a contract for or provides public defense services and at least one of whom is a public member, recommended by the Council chair, ~~V~~ice-Chair and ~~BOG~~Board of Governors Liaisons.
- Two representatives from local government or public defense administrators, recommended by the Council Chair, Vice-Chair and ~~BOG~~Board of Governors Liaisons

### **Voting Procedures**

All Council members, other than emeritus members, are eligible to vote. Judicial members may choose to recuse themselves from voting relating to any matters. If judicial members choose to recuse themselves from votes relating to court rules or legislation, on those occasions, and only on those occasions, the membership of the Council, for purposes of determining whether a supermajority have voted in favor or against a proposition, shall be reduced by the number of judges who have recused themselves. This provision does not apply if a judicial member is merely absent.

### **Attendance Requirements**

Council members who have three consecutive unexcused absences in any 12-month period will be considered to have resigned from the Council. The Council may seek a replacement member through the regular WSBA volunteer process, unless the absent member was nominated by an outside party. In that case the outside party will be asked to appoint a replacement.

Council members may be excused for good cause by the Chair. Such an excuse should be sought prior to the meeting.

# WASHINGTON STATE BAR ASSOCIATION

Office of General Counsel

Nicole Gustine, Assistant General Counsel

**TO:** WSBA Board of Governors  
**FROM:** Nicole Gustine, Assistant General Counsel  
**DATE:** December 26, 2022  
**RE:** Confidentiality of Client Protection Board Recommendations

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The Board of Governors (BOG) is responsible for approving gifts from the Client Protection Board. Per Court Rule, all of the materials, reports, and deliberations shall not be public. (APR 15 Procedural Regulations, Regulation 13(b)). As such, the recommendations are placed on the Consent Calendar. If discussion is requested by any Governor, it shall be taken up in Executive Session.

## **APR 15**

### **CLIENT PROTECTION FUND PROCEDURAL REGULATIONS REGULATION 13. CONFIDENTIALITY**

(a) Matters Which Are Public. On approved applications, the facts and circumstances which generated the loss, the Client Protection Board's recommendations to the Trustees with respect to payment of a claim, the amount of claim, the amount of loss as determined by the Client Protection Board, the name of the lawyer, LLLT, or LPO causing the loss, and the amount of payment authorized and made, shall be public.

(b) Matters Which Are Not Public. The Client Protection Board's file, including the application and response, supporting documentation, and staff investigative report, and deliberations of any application; the name of the applicant, unless the applicant consents; and the name of the lawyer, LLLT, or LPO unless the lawyer, LLLT, or LPO consents or unless the lawyer's, LLLT's, or LPO's name is made public pursuant to these rules and regulations, shall not be public.

The following report of CPB recommendations contains only pre-approved applications, and is therefore provided to you as a Trustee, confidentially. The report will not appear in the BOG meeting's public session materials. Please take the time to review the materials thoroughly prior to the BOG public session meeting.

Pursuant to ELC 3.4(l), the Chief Disciplinary Counsel has authorized the release of otherwise confidential disciplinary information to the Board of Governors for the purpose of reviewing and deciding on Client Protection Fund Board recommendations. The Board of Governors is advised of its obligation to maintain the confidentiality of these materials.

**Please do not discuss any details regarding the matters, including the names or amounts related to the matter, at the public session meeting.**



**WASHINGTON STATE**  
**BAR ASSOCIATION**

**TO:** WSBA Board of Governors  
**FROM:** Susan Bbye, Chair, WSBA Judicial Recommendation Committee; Sanjay Walvekar, Staff Liaison to the  
Judicial Recommendation Committee  
**CC:** Terra Nevitt, Executive Director  
**DATE:** January 14, 2023  
**RE:** WSBA Judicial Recommendation Committee December 8, 2022 Interviews and Recommendations

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**ACTION: Approve the recommendations of the WSBA Judicial Recommendation Committee.**

The WSBA Judicial Recommendation Committee met via Zoom on December 8, 2022 for the purpose of conducting an interview with an individual interested in being considered for future openings on the Washington State Court of Appeals. Per committee guidelines approved by the Board of Governors, the proceedings and records of the committee, including applicant names, committee discussions, and committee votes, are kept strictly confidential. The committee's recommendations are available in the Governor's materials via the WSBA cloud-sharing service.

# Security Tips - Cybersecurity Awareness 2023

Website: [Cybersecurity Awareness training \(amazon.com\)](#)

## 1. Recognize Phishing Attacks

- Phishing tries to get you to accidentally reveal confidential information, such as passwords or credit card numbers.
- Hover/focus over URLs before clicking links. If you don't recognize the site or it looks suspicious, don't click. Links and attachments in phishing emails can contain information-gathering malware. To do this on a mobile device, hold your finger down over the link and it will preview.

### **Insert:**

#### **Phishing email could include one or multiple of the following:**

- Personalized to recipient, referring to recipient by name.
- Written with a sense of urgency.
- Make it feel relevant due to name or content.
- Vague, in that not enough information is provided, so the recipient needs to take action to confirm.
- May attempt to collect personal information or account credentials from the recipient.
- May originate from an email address that has been compromised.

#### **Other signs to watch for:**

- Poor grammar or typos.
- Impersonated sender email address.
- Noted examples:
  - Dan Clark [gorxt221@gmail.com](mailto:gorxt221@gmail.com)
  - Francis Adewale [treasurer01@talktalk.net](mailto:treasurer01@talktalk.net)
  - Tracy S. Flood [publi@drpelo.com](mailto:publi@drpelo.com)

## 2. Reduce Physical Security Risks

- Always wear your badge on company premises and avoid wearing them in public places.
- Don't use your badge or credentials to grant access for others. They can always get a loaner badge from the reception desk.
- If you see someone without a badge, remind them to display it.
- Always check that your working environment is physically safe and protected.

## 3. Using Company Resources

- Only use your company email for work purposes. Don't send company data to non-company email addresses.
- Use company-managed computers only for business and limited personal use. Don't use company's intellectual property for personal use.
- Keep your work and personal devices' software up-to-date.

## 4. Protect Information and Data

- Don't print confidential documents unless absolutely necessary. Don't share them with others if they don't have a need to know. Use cross-cutting shredders to safely dispose of them at home or in the office.
- Wipe all writing boards after using the meeting rooms and remove or shred any printed documents.
- Don't discuss confidential work topics in public places. Someone could overhear your conversation.
- Always lock your work computer when you step away - even at home.

## 5. Using Third-Party Applications or Services

- Download software only from approved company sources.
- Don't upload non-public company data to a third-party service or cloud.
- Get security approval for third-party services.

## 6. Handling Business Data

- Familiarize yourself with the different types of customer information and when to access it as defined by your company classification standards.
- It's your responsibility to know what you can share outside of your company.
- Talk to your supervisor if you need more guidance in understanding what type of data you are working with, how to share, and store it securely.

## 7. Maintain Device Security

- Don't allow anyone else to use your company devices. Always store your company devices in a secure place out of sight when not using it.
- Unless absolutely necessary, don't take your company devices with you when traveling, especially to high risk areas.
- If your company device is lost or stolen, report it immediately to security.

## 8. Data Privacy

- Be aware of data privacy. Data privacy involves the rights and obligations of individuals and organizations regarding the collection, use, retention, disclosure, and disposal of personal data. Personal data is information that can be linked, either directly or indirectly, to a particular person.
- If you process personal data, know the privacy risks. Processing of personal data includes collecting, retrieving, using, disclosing, sharing, and erasing personal data.

## 9. Safe Communication Habits

- Do not share private information.
- Keep security in mind with apps you use, who you send business information to, and what you share.

## 10. Recognize Social Engineering Threats

- Social engineers get you to react quickly rather than logically and they can be persuasive, convincing, and demanding. If you feel rushed or pressured, pause and think if someone is trying to get confidential information from you, or use your credentials to access information.
- Document as much information as possible about the incident (phone number, name, the website referenced) and report it to security.

### Additional Recommendations

#### Don't...

- ...share usernames or passwords with anyone.
- ...use the same password for everything.
- ...click on any links in emails or texts.
- ...provide any personal information via text or email (even responding provides the sender information)
- ...ignore it - if you received the email, others you know may also be a target of the same phishing scheme.

#### Do...

- ...verify sender **actual** email address (not the display name).
- ...call the person directly and confirm that the email/information was sent by them and intended for you.

Important note: Even if the email address is correct, there is a chance that their email account has become compromised. This is why it is always best to confirm verbally before taking any action.

- ...go directly to the website or contact the company directly in order to confirm the contents of the email.
- ...change your passwords regularly and use pass phrases/strong password formats.
- ...agree, in advance, on your process for working with others.

**TO:** WSBA Board of Governors  
**CC:** Terra Nevitt, Executive Director  
**FROM:** Sara Niegowski, Chief Communications and Outreach Officer, and the WA Legal Link Project Team  
**DATE:** Dec. 28, 2022  
**RE:** Washington Legal Link Project: Proceed or Not?

**DISCUSSION:** What information or input does the Board of Governors need, if any, to decide whether to move forward or sunset the Washington Legal Link project?

The public and WSBA members have long requested—and expected—that the State Bar do more to connect people who need legal help with a licensed legal professional with experience in their area of concern. For several years, the WSBA has been researching and planning a tool to make these types of legal matches. Now, after its own careful consideration of the project, the Long Range Strategic Planning Council (LRSPC) requests review by the entire Board of Governors to decide whether and how to proceed. Essentially, the Board of Governors is deciding whether to make Washington Legal Link a strategic priority (with associated resource allocation), and the question today is: What additional information does the Board need to make this decision?

### **Background**

Since 2018, the WSBA has been developing a concept that is part marketing tool for members and part service for the public (a win/win for all: more people accessing and using legal services). Named Washington Legal Link, this prospective marketing and referral resource is an opt-in platform for members that will allow them to present much more information to the public than what is currently available in WSBA’s Legal Directory—a photo and open text fields to describe their practice and services, for instance. From the user perspective, anyone searching for legal help in Washington will be able to visit the WSBA website and follow a few simple steps to get a list of available legal professionals based on their legal need, location, and other preferences. Ta-da! It’s a legal match!

From 2019 to 2020, this project was on the back burner as the WSBA dealt with more immediate issues of leadership changes and pandemic conditions. Emerging from these challenges, we are once again ready to proceed at the Board of Governors’ discretion. Our groundwork has included issuing a preliminary RFP in fall 2020 to get a sense of the technical costs and conducting focus groups with members to gather feedback in spring 2021.

From 2021 to 2022, the LRSPC reviewed the project and ultimately decided the magnitude—including resources and member and public impact—is significant enough that the entire Board of Governors should consider whether Washington Legal Link moves forward. Toward that end, the Washington Legal Link Project Team has prepared a project overview presentation for the Board of Governors.

### **Stakeholder Input**

*See presentation: Great enthusiasm from both public and member focus groups. Part of the presentation process is to determine what additional stakeholder input the Board needs to make a decision.*



*WSBA RISK ANALYSIS: The Office of General Counsel has been involved in the Legal Link project since its inception. Though not without risks, General Counsel agrees there are ways to mitigate risks, including comprehensive terms of service, to move forward. Part of the presentation process is to determine what legal concerns the Board has and how the project team (working with General Counsel) plans to address those.*

*WSBA FISCAL ANALYSIS: We anticipate \$230,000 to \$280,000 to develop and build the platform, likely split among several fiscal years as the work is done; and \$50,000 to \$75,000 in the second and third years of operation to reach full capacity and address any needed fixes.*

*WSBA EQUITY ANALYSIS: Initial feedback from public and members shows a resource like Washington Legal Link would be an equitable tool—especially as users on both ends do not have to pay to use it. Part of the presentation process is to determine what specific information from an equity-perspective the Board needs to move forward.*

### **Attachments**

*Washington Legal Link presentation*

# WASHINGTON LEGAL LINK

Presentation to the Board of Governors

January 2023



# IMAGINE LEGAL LINK

## What is it?

- A user-friendly, interactive platform for clients to find legal professionals best suited to their needs.
- *It's like Match.com for clients seeking legal services!*

# HOW IT WORKS

Bar members opt in to complete a free profile describing their practice and availability, inputting specific criteria such as location, practice area, and price point.

They can personalize their profile as a marketing tool.

**Washington Legal Link**

REGISTER LOGIN LEGAL DIRECTORY WSBA.ORG CLESTORE CASEMAKER CONTACT US

MY WSBA PROFILE MY CLE ACTIVITIES SEARCH CLE STORE MY CLE PURCHASES

**Elle Wood**  
 2323 Rodeo Drive  
 Beverly Hills, CA 98201  
 Elle@yahoo.com  
 (917) 555-2828

Lawyer  
 47821  
 Years of Practice 2  
 Carries Malpractice Insurance

I can help with...

Area	Consumer Statement
My Business	I need assistance forming my business or non-profit
My Business	I need assistance with preparing a contract to with with other organizations

I'm comfortable using legal language in everyday life - I object!

Employer	Pine, Woods and Down
Organization Size	51-100
Title	Partner

**About Me**  
 President of my sorority, home coming queen and who ever said orange is the new pink was seriously misguided.

**Additional Information**  
 Faux fur lingerie design, party planner, able to retain details and use them at the drop of the hat

**Education**  
 Harvard - 2016 - Juris Doctor  
 UCLA - 2013 - Bachelor of Science - Fashion

Fee Type	Hourly Rate	Hourly Range
Fixed Rate		From \$250 to \$350
Free Consultations		
Virtual Consultations		
TDD	(917) 555-2222	

For more details regarding fee arrangements, contact me.

**Counties Served**  
 Asotin  
 Clallam  
 Columbia

**Languages other than English**  
 French  
 Korean  
 Mandarin

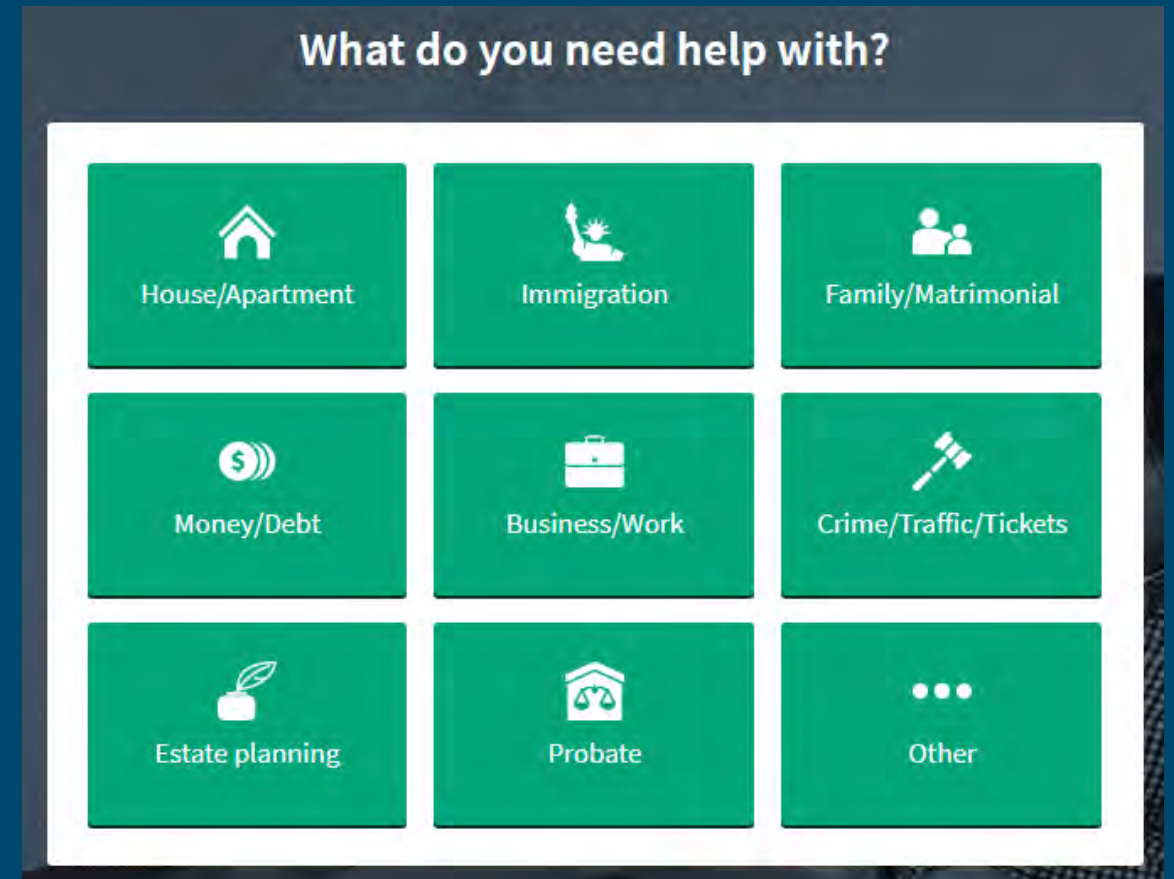
Report an issue with this profile

WSBA doesn't endorse or verify any information presented on this site. Issues can be posed on the WSBA complaints site.

WA Legal Link - Terms and Conditions  
 ACCESSIBILITY PRIVACY POLICY  
 Toll-free: 800-955-9772 Local: 206-465-9772  
 Email: questions@wsba.org

# HOW IT WORKS

- Public users can browse or search legal professional profiles using filters based on their legal issue, needs, and desires for representation or consultation.
- The user then reaches out to a selected legal professional using a contact form built into the site.
- Legal professionals also can use the site to recommend colleagues better suited to a clients' needs.



# WHY IS IT NEEDED...

## FOR MEMBERS:

- WSBA members are eager for a *free*, statewide marketing and referral tool.
- Focus groups proved that members, from solo to large-firm practitioners, would find considerable value in a tool like Legal Link—for its ability to give a boost to those without big marketing budgets and to provide networking/referral options.

# WHY IS IT NEEDED...

## FOR THE PUBLIC

- Lawyer referral is the top public request in our Service Center. The public *wants* and *expects* the state bar to assist with finding legal help. (E.g., the WSBA Service Center received more than 37,000 calls from June 2021 to June 2022; 98% of the public calls requested lawyer referrals/legal advice.)
- Legal Link can be an important tool in our overall strategic goal to outreach to the public to provide education and trust and confidence in the legal profession. (And to get more people using legal services.)
- Pro Bono Council brainstormed "how the WSBA can be most helpful to the public" and they independently came up with the Legal Link project!

# WHY IS IT NEEDED...

## FOR WSBA:

Supports our most important values and strategic goals:

- Access to justice and closing the civil-legal need gap.
- Providing value and support to members.
- Providing a platform to promote engagement with the public around our pillars of messaging (trust and confidence in the legal profession, education about legal services, and examples of outstanding legal professionals).



# PROJECT HISTORY

## 2018

- **February:** Initial research & analysis began.
- **April:** Defined scope, goals, timeline & deliverables.
- **June:** Identified project team, IT requirements & determined customer journey.
- **July-December:** Designed page & application, developed brand, began user acceptance testing. Focus groups in conjunction with Legal Check Up.

## 2019-2020

- **Ongoing:** Continued with technical work; organizational leadership changes and COVID response temporarily shift focus from the project.
- **September 2020:** RFP deployed to get an estimate of resources needed for the project.

## 2021-2022

- Solo/Small Practice member focus groups.
- Executive Leadership Team evaluates the IT project list and forms the Legal Link project team to refresh the concept and financial information for the Council.
- Long Range Strategic Planning Council reviews concept and refers to the entire Board of Governors.

# THE ROAD AHEAD

**Year 1:** Budget allocation, solidify the project timeline, reissue RFP, find vendor, build out member profiles, beta test, introduce concept to members, launch member portal

**Year 2:** Members complete profiles as part of licensing; introduce public-side portal when a critical mass of members complete profiles

**Year 2 and beyond:** Maintenance and updates/upgrades; ongoing public outreach campaign



# TECHNOLOGY COSTS

- **Develop and Build:** Est. \$230,000 to \$280,000
- **Maintenance and enhancements:** \$50,000 to \$75,000 in second and third years to reach full capacity for member- and public-side portals

# SUNSET OR MOVE AHEAD?

What additional information do you need?

- Outreach?
- Legal?
- Financial?
- Equity?
- Other?



# PROJECT LEADS CONTACT

Noel Brady

[noelb@wsba.org](mailto:noelb@wsba.org)

Margeaux Green

[margeauxg@wsba.org](mailto:margeauxg@wsba.org)

**TO:** WSBA Board of Governors  
**CC:** Executive Director Terra Nevitt  
**FROM:** President Daniel D. Clark, Long Range Strategic Planning Council Chair  
**DATE:** January 4, 2023  
**RE:** Proposal to increase the Facilities Reserve Fund

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**ACTION:** Approve the recommendation of the Long Range Strategic Planning Council to move \$1.7 million of unrestricted reserves to the Facilities Reserve Fund.

At its meeting on December 12, 2022, WSBA's Long Range Strategic Planning Council voted to recommend to the Board that it move \$1.7 million of WSBA's unrestricted reserves into the Facilities Reserve Fund. This recommendation arose out of the Council's ongoing discussions with regard to the future of WSBA's space when its lease expires at the end of 2026. As set for in Fiscal Policies and Procedures, the Facilities Reserve Fund is a board-designated fund established to support future facilities, including an office move, refurbishment of existing office space, or preparation for the purchase of operational real estate. The Fiscal Policies set the minimum balance of the fund at \$1.0 million, which is its current balance.

*WSBA RISK ANALYSIS: This section is to be completed by the Office of General Counsel, with input from the proposing entity or individual.*

**Proposed Action:** The BOG is asked to approve moving funds into the Facilities Reserve Fund to increase the amount in that fund to 2.5M.

#### **Rules and Limitations to Consider**

##### *GR 12*

GR 12.2(a)(10) In general, the WSBA strives to operate a well-managed and financially sound association, with a positive work environment for its employees.

GR 12.2(b)(22) In pursuit of these purposes, the WSBA may establish the amount of all license, application, investigation, and other related fees, as well as charges for services provided by the WSBA, and collect, allocate, invest, and disburse funds so that its mission, purposes, and activities may be effectively and efficiently discharged. The amount of the license fee is subject to review by the Supreme Court for reasonableness and may be modified by order of the Court if the Court determines that it is not reasonable.

##### *WSBA Bylaws*

None relating specifically to moving funds into the Facilities Reserve.

##### *WSBA Fiscal Policies and Procedures*

The Budget and Audit Facilities Advisory Subcommittee is tasked with:

- (1) Periodically review the balance in the facilities Reserve Fund and analyze whether such balance is prudent and adequate in relation to identified needs and decisions, current market conditions, future market projections, time remaining until the end of current lease, etc.
- (2) Make recommendations as to target Facilities Reserve Fund balances at future points in time and suggest strategies and/or funding policies for meeting those targeted balances.

**Legal Risks:** This appears to be a policy decision with minimal legal risk.

*WSBA FISCAL ANALYSIS: This section is to be completed by the Finance Department, with input from the proposing entity or individual.*

As of September 30, 2022, WSBA General Fund reserve balances total \$8,713,268, designated into the following three reserves: 1) Operating Reserve (\$2 million), 2) Facilities Reserve (\$1 million), and 3) Unrestricted Reserves (\$5,713,268). The proposed recommendation would reallocate \$1.7 million from Unrestricted Reserves to the Facilities Reserve, resulting in a balance of \$2.7 million in the Facilities Reserve and \$4,013,268 in the Unrestricted Reserves.

The Unrestricted Reserves is WSBA’s cumulative balance of net income or loss from General Fund operations not otherwise restricted or designated. In years where WSBA incurs an operational loss, the unrestricted reserves are used to support the loss. When considering the fiscal impact of the recommendation, we look at fiscal projections for FY 2023 to FY 2026 to determine what level of funding is needed to support operations through the end of our lease term (December 2026). The projections assume no change to the annual license fee of \$458, minimal growth in membership, increases in costs aligned with WSBA’s compensation structure and benefits plan, and estimated average inflation for direct program costs. The projections estimate a cumulative loss of approximately \$4.68 million from FY 2023 to FY 2026. This results in an estimated shortfall of \$670,000 in the Unrestricted Reserves by the end of FY 2026. However, projections are estimates and actual results will likely differ. WSBA tends to perform favorably against its projected budget each year which is illustrated by this following financial performance chart:

<b>Fiscal Year</b>	<b>Budgeted Loss or Gain</b>	<b>Actual/*Estimated Net Increase</b>	<b>Overall Increase Actual v. Budgeted</b>	<b>Unrestricted General Fund Reserves</b>	<b>Reserve Notes</b>
FY 2018	(-\$732,275)	\$432,107	\$1,164,382	\$1,845,858	
FY 2019	(-\$101,616)	\$940,679	\$1,042,295	\$2,686,537	\$100,000 of unrestricted net income allocated to Facilities Reserve
FY 2020	(-\$591,915)	\$791,697	\$1,383,612	\$3,478,234	
FY 2021	(-\$202,779)	\$1,543,940	\$1,746,719	\$4,522,174	\$500,000 of unrestricted net income allocated to Facilities Reserve
FY 2022	(-\$89,563)	\$1,641,094	\$1,730,657	\$5,713,268	\$500,000 of unrestricted net income allocated to Operating Reserve, \$50,000 of Facilities Reserve allocated back to Unrestricted General Fund Reserves
FY 2023	(-\$561,000)				

The graph reflects WSBA's General Fund Financial performance FY 2018 to FY 2022. WSBA's unrestricted general fund has rose during that time from \$1,845,858 at the end of FY 2018, to \$5,713,268 at the end of FY 2022.

Over the most recent 5-year period, the General Fund has budgeted an average annual loss of (\$343,000) but actual year-end figures resulted in average annual net income of just over \$1 million (ranging from \$432,000 to \$1.76 million). The reasons for this vary, but typically it is combination of higher-than-expected license fee revenue and lower staffing and direct costs.

While WSBA has performed historically better than budgeted figures the last several years, ultimately, if savings from actual results do not make up for the reserve shortfall, WSBA would need to either increase revenue, decrease expenses, and/or some combination of the two. Another option ultimately could be that future Boards could move some (or all) of the Facilities Reserves back into the unrestricted general fund for operational costs and/or new programs if necessary and the funds have not been spent.

Licenses fees are the largest source of General Fund revenue and fees have been set through 2024 to remain at \$458. Previous Board of Governors have publicly committed not to raise License fees from the \$458 rate through the end of 2026.

Lastly, the amount of Facilities Reserves needed is dependent upon the options being considered for future WSBA space, with a focus on funding one-time expenses for moving, furniture/equipment, leasehold improvements, technology, down-payments, etc. A \$2.7 million reserve provides funding for a number of options, including estimates for an office move to another location. Other space options such as buying or constructing a building would require more funds to be added to the Facilities Reserves in the coming years.

These financial figures also do not include potential future revenue if WSBA is able to successfully sublease portions of unused space with its current lease before the end of 2026, and/or if the BOG were to vote to renegotiate our existing lease and extend but release a much smaller space which would result in reduced expenses. If we are able to find subleases of existing space that would result in additional revenue.

*WSBA EQUITY ANALYSIS: This section is to be completed by the Equity and Justice Team, with input from the proposing entity or individual.*

As the Board of Governors considers the future of the WSBA space, consistent with its stated goals around equity and inclusion, the LRSPC should engage in authentic community outreach and engagement, especially with members, staff and the public who may be most impacted by the location of and access to WSBA building space. The following are specific considerations to take into account when making decisions about the space.

#### *Physical Accessibility*

Although current WSBA offices are legally considered ADA-accessible, accessing our current WSBA spaces still presents many challenges for people that use wheelchairs and mobility aids. When considering any new space, we should identify and center the people who have the most barriers to accessing the WSBA's physical offices and intentionally engage with those groups to influence our decision making and planning.



### *Digital Accessibility*

WSBA should consider technology and digital access in its decisions about the WSBA office spaces. Specifically, we should ensure that building spaces allow for hybrid/remote workforce support, and that conference and meeting spaces are conducive to full inclusion of WSBA members, staff, and members of the public who are accessing meetings remotely.

### *Geographical Location*

In considering geographical location, the WSBA should consider the economic impact on people who access our space(s) including: 1) cost to get to the location and for parking; and 2) proximity to public transportation hubs. Given that staff and many members are located within the Puget Sound region and that Seattle is the biggest transit hub, WSBA should consider spaces within city limits which likely have better public transportation access.

### *Impact on Staff*

The building changes should also consider impact on staff, many of whom live in King County. If relocation to an area outside of King County is pursued, the LRSP and the Executive Leadership Team should ensure that this does not cause a reduction in compensation rates for staff members. In addition, the experience of staff and the ability to make the space inclusive should also be considered (e.g., gender-inclusive bathroom spaces, private spaces for nursing parents).

### *WSBA Member Impact*

In light of the increasing number of members who have moved to a virtual law practice, there may be an increase in the need or desire to use WSBA space for occasional client meetings or meeting with other members. If the WSBA wants to continue to offer members this benefit, the LRSP should consider whether there may be access needs specific to this purpose.

# WASHINGTON STATE BAR ASSOCIATION

**TO:** WSBA Board of Governors and Governors-Elect  
**FROM:** Pam Anderson, Chair, Committee on Professional Ethics  
Jeanne Marie Clavere, Staff Liaison  
**DATE:** November 29, 2022  
**RE:** Amended Advisory Opinion 201601

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**INFORMATION ONLY:** Amended Advisory Opinion 201601 regarding the ethical practices of the virtual or hybrid law office.

The Committee on Professional Ethics (CPE) approved amendments to advisory opinion 201601 regarding ethical considerations under RPC 1.1; 1.6; 1.7; 1.9; 1.10; 1.15A; 1.15B; 1.18; 5.1; 5.2; 5.3; 5.5; 5.10; 7.1; 8.4; and 8.5. Since the onset of the pandemic more lawyers are choosing to do some or all their work remotely. The amendments to this advisory opinion address additional issues because more Washington licensed lawyers are practicing remotely and lawyers from other jurisdictions are practicing remotely from Washington. The opinion also discusses key RPCs to consider when practicing from a virtual law office.

A subcommittee of the CPE studied the issue for nearly two years, researched opinions from the American Bar Association and other states, and spoke with practitioners in several practice areas as it developed updates to the opinion. The CPE believes the updated opinion focuses on special considerations when lawyers practice virtually and underscores that the Rules of Professional Conduct apply no differently in the virtual office context.

Advisory Opinion: 201601

Year Issued: 2016 and 2022 Amendments

**RPC(s):** RPC 1.1, 1.6, 1.7, 1.9, 1.10, 1.15A, 1.15B, 1.18, 5.1, 5.2, 5.3, 5.5, 5.10, 7.1, 8.4, 8.5

**Subject:** Ethical Practices of the Virtual or Hybrid Law Office<sup>1</sup>

Many lawyers are choosing to do some or all their work remotely, from home or other remote locations. Advances in the reliability and accessibility of on-line resources, cloud computing, video conferencing, and email services have allowed the development of the virtual law office, by which the lawyer does not maintain a physical office. The COVID-19 pandemic accelerated this trend, causing many lawyers to work remotely (virtually), or to split their time between a traditional office and a remote office (a hybrid office).<sup>2</sup>

Although this modern business model may appear radically different from the traditional brick and mortar law office model, the underlying principles of an ethical law practice remain the same. The core duties of diligence, loyalty, and confidentiality apply whether the office is virtual or physical. For the most part, the Rules of Professional Conduct (RPC) apply no differently in the virtual office context. However, there are areas that raise special considerations in the virtual law office.

Below we first address whether a Washington licensed lawyer needs a physical address. We then discuss ethical considerations for lawyers who practice remotely from outside of their state of licensure. We then summarize some of the ethical issues lawyers with virtual law practices may face.

## I. Requirement for Physical Office Address

### A. General Requirements

There is no requirement that WSBA members have a physical office address. Section III(C)(1) of the Bylaws of the Washington State Bar Association (WSBA) requires that each member furnish both a “physical residence address” and a “principal office address.” The physical residential address is used to determine the member’s district for Board of Governors elections. The Bylaws do not require that a principal office address be a physical address. However, Section

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<sup>1</sup> This opinion has been updated from its previous version to reflect 2021 amendments to Title 7 of the Washington Rules of Professional Conduct, emerging considerations in virtual practice, and insight on remote legal practice from A.B.A. Formal Ethics Opinion 498 (March 10, 2021), *available at* [https://www.americanbar.org/content/dam/aba/administrative/professional\\_responsibility/aba-formal-opinion-498.pdf](https://www.americanbar.org/content/dam/aba/administrative/professional_responsibility/aba-formal-opinion-498.pdf) (last visited November 18, 2021).

<sup>2</sup> See Mark J. Fucile, *New Normal: Risk Management for 'Hybrid' Offices*, Washington State Bar News, Dec. 2021/Jan. 2022 at 16, <https://wabarnews.org/2021/12/07/new-normal-risk-management-for-hybrid-offices/>

III(C)(3) requires an active member residing out of Washington to file with the WSBA the name and physical street address of a designated resident agent within Washington State.

Similarly, Admission and Practice Rule (APR) 13(b) requires a lawyer to advise the WSBA of a “current mailing address” and to update that address within 10 days of any change. Nothing in that rule indicates the mailing address must be a physical address.

General Rule (GR) 30 permits courts to require service by email. If a lawyer is handling litigation in a jurisdiction that has not adopted such a requirement, the lawyer might wish to serve opposing counsel through hand delivery. The Civil Rules (CR) do not require that a lawyer provide an address for hand delivery. Rather, CR 5(b)(1) provides that if the person to be served has no office, service by delivery may be made by “leaving it at his dwelling house with a person of suitable age and discretion then residing therein.” Service, of course, also may be made by mail. Particularly in jurisdictions where it is customary to serve pleadings by hand delivery, providing the opposing counsel with a physical address to do so (such as a business service center) may mean that the lawyer will get the pleadings considerably faster. If a lawyer does not want to provide opposing counsel with an address for hand delivery, we suggest that the lawyer seek an agreement to have pleadings served by email instead, as permitted under GR 30(b)(4). This opinion does not address opposing counsel’s options in the event service by hand delivery is desired, but the Washington lawyer does not agree to a physical address or alternate means of delivery.

## B. Address in Advertisements

Under RPC 7.1, “A lawyer shall not make a false or misleading communication about the lawyer or the lawyer’s services.” Therefore, a lawyer working virtually may use a post office box, private mailbox, or a business service center as an office address in advertisements, so long as that information is accurate and not misleading. *See* RPC 7.1 cmt. [6]. An address listed in an advertisement may be misleading if a reader would wrongly assume that the lawyer will be available in a particular location. For example, it may be misleading for an out-of-state lawyer to list a Seattle address in an advertisement if the lawyer will not be available to meet in Seattle. However, if the advertisement discloses that the lawyer is not available for in-person meetings in Seattle, the advertisement may not be misleading. *See* also Section III-C below.

A law firm with offices in multiple jurisdictions may establish and maintain an office in Washington even if some of the firm’s lawyers are not admitted in Washington. To avoid misleading the public, however, when identifying lawyers as practicing in a multi-jurisdictional office, the firm should indicate the jurisdictional limitations of lawyers not licensed to practice in a jurisdiction where the office is located. RPC 7.1 & cmt. [14]; RPC 5.5(f) & cmt. [22].

## II. Remote Practice from Outside of State of Licensure

### A. Washington-Licensed Lawyers Practicing Remotely

Lawyers increasingly are practicing law remotely not only from a physical office, but also from outside their state of licensure. For example, a lawyer who is licensed only in Washington may

practice from a home office in Oregon, Idaho, or another jurisdiction. The COVID-19 pandemic amplified the need for and interest of lawyers to work from a home that may not be located in their state of licensure. Many lawyers may continue to pursue this practice model after the pandemic subsides.

This opinion is generally limited to Washington’s interest in regulating Washington lawyers who practice remotely in another jurisdiction. A Washington lawyer’s practice that creates a professional footprint in more than one jurisdiction potentially may subject the lawyer to discipline in each jurisdiction. *See* RPC 8.5. Washington lawyers who practice remotely in another jurisdiction therefore should confirm that their presence in the other jurisdiction does not violate that jurisdiction’s definition of the unauthorized practice of law. A Washington lawyer practicing remotely in another jurisdiction also should investigate and comply with local business and tax regulations and any other applicable laws, an issue that exceeds the scope of this opinion.

A lawyer licensed in Washington may practice remotely from a jurisdiction outside of Washington without committing an unauthorized practice of law violation, only if allowed by the other jurisdiction. RPC 5.5, which regulates the unauthorized practice of law, is largely adopted from American Bar Association (“A.B.A.”) Model Rule of Professional Conduct 5.5, which most other states also have adopted. A lawyer’s remote practice from a jurisdiction in which the lawyer is not licensed implicates Washington RPC and A.B.A. Model Rule 5.5(b), which both provide that a lawyer who is not admitted in a jurisdiction shall not “establish an office or other systematic and continuous presence in [the] jurisdiction for the practice of law,” or “hold [the lawyer] out to the public or otherwise represent that the lawyer is admitted to practice in [the] jurisdiction.”

In late 2020, the A.B.A. issued Formal Ethics Opinion 495 to address whether remote practice from a jurisdiction where a lawyer is not licensed violates Model Rule 5.5.<sup>3</sup> A.B.A. Opinion 495 takes the position that “a lawyer may practice law authorized by the lawyer’s licensing jurisdiction for clients of that jurisdiction, while physically located in a jurisdiction where the lawyer is not licensed if the lawyer does not hold out the lawyer’s presence or availability to perform legal services in the local jurisdiction or actually provide legal services for matters subject to the local jurisdiction, unless otherwise authorized.”<sup>4</sup> A.B.A. Opinion 495 further clarifies activities that do *not* constitute unauthorized practice in a remote jurisdiction:

A local office is not “established” within the meaning of [RPC 5.5(b)] by the lawyer working in the local jurisdiction if the lawyer does not hold out to the public an address in the local jurisdiction as an office and a local jurisdiction address does not appear on letterhead, business cards, website, or other indicia of a lawyer’s presence . . . If the lawyer’s website, letterhead, advertising, and the like clearly indicate the lawyer’s jurisdictional limitations, do not provide an

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<sup>3</sup> *See* A.B.A. Formal Ethics Opinion 495 (December 16, 2020) (“A.B.A. Opinion 495”), [https://www.americanbar.org/content/dam/aba/administrative/professional\\_responsibility/aba-formal-opinion-495.pdf](https://www.americanbar.org/content/dam/aba/administrative/professional_responsibility/aba-formal-opinion-495.pdf) (last visited March 10, 2021).

<sup>4</sup> *See* A.B.A. Opinion 495, at 3-4.

address in the local jurisdiction, and do not offer services in the local jurisdiction, the lawyer has not “held out” as prohibited by the rule.

A number of jurisdictions have issued ethics opinions that track or expressly adopt A.B.A. Opinion 495.<sup>5</sup> This Washington opinion agrees with this emerging but consensus view that a state does not have a substantial interest in prohibiting a lawyer from practicing the law of a jurisdiction in which the lawyer is authorized solely because the lawyer is practicing from a home office in another jurisdiction. A Washington-licensed lawyer therefore generally does not violate RPC 5.5 by practicing from a home that is remote from Washington if the lawyer adheres to the guidelines that are enumerated in A.B.A. Opinion 495.

A remote Washington-licensed lawyer, however, may not establish or advertise a physical presence outside of the home to practice law in the remote jurisdiction unless that physical presence is otherwise authorized by the remote jurisdiction. Nor may the remote Washington-licensed lawyer explicitly or implicitly communicate that the lawyer is authorized to practice law in that jurisdiction, such as by assisting a local client with a legal matter that is limited to the remote jurisdiction.<sup>6</sup>

A lawyer practicing remotely whose multi-jurisdiction law firm has an office in the remote jurisdiction should ensure that communications such as the firm website, advertising, and letterhead do not imply that the remote lawyer is authorized to practice law in that jurisdiction. The key principle for permissible remote practice is that “the lawyer is for all intents and purposes invisible *as a lawyer* to a local jurisdiction where the lawyer is physically located, but not licensed.”<sup>7</sup> When a remote Washington-licensed lawyer complies with these limitations, the lawyer’s use of a virtual communication platform such as Zoom to hold meetings from home or to appear in a judicial proceeding in a jurisdiction in which the lawyer is authorized to practice presumptively does not establish a law practice in the remote jurisdiction.

A Washington lawyer further may be otherwise authorized to practice law in a remote jurisdiction by RPC 5.5(c) or 5.5(d). For example, a Washington lawyer may practice temporarily in a jurisdiction where the lawyer is practicing remotely to participate in an

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<sup>5</sup> See Pennsylvania Bar Association Committee on Legal Ethics and Professional Responsibility and Philadelphia Bar Association Professional Guidance Committee Joint Formal Opinion 2021-100, *Ethical Considerations for Lawyers Practicing Law from Physical Locations Where They Are Not Licensed* (March 2, 2021); The Florida Bar Standing Committee on the Unlicensed Practice of Law Advisory Opinion 2019-4, *Out-of-State Attorney Working Remotely from Home* (August 17, 2020); District of Columbia Court of Appeals, Committee on Unauthorized Practice of Law, *Teleworking from Home and the COVID-19 Pandemic* (March 23, 2020); see also Carole J. Buckner, *Spotlight on Ethics: Rules of Remote Work*, California Lawyer’s Association, available at <https://calawyers.org/california-lawyers-association/spotlight-on-ethics-rules-of-remote-work/> (last visited November 15, 2021).

<sup>6</sup> Cf. e.g., *In re Charges of Unprofessional Conduct in Panel File No. 39302*, 884 N.W.2d 661 (Minn. 2016) (admonishing Colorado lawyer under Minnesota RPC 5.5(a) for the unauthorized practice of law even though the lawyer was never physically present in Minnesota, because the lawyer negotiated by email with a Minnesota lawyer about a Minnesota judgment on behalf of Minnesota clients).

<sup>7</sup> A.B.A. Opinion 495, at 3.

alternative dispute resolution proceeding that reasonably relates to the lawyer's practice in Washington. *See* RPC 5.5(c)(3). In addition, a Washington lawyer may establish an office or engage in systematic and continuous practice in a jurisdiction when that practice is authorized by federal law. *See* RPC 5.5(d)(2). But when practicing without a local license under any of these provisions, the lawyer must limit this practice to the scope that RPC 5.5 authorizes for these specified purposes.

#### B. Lawyers from Other Jurisdictions Practicing Remotely from Washington

Similarly, a lawyer who is licensed in another jurisdiction may practice law remotely from a location in Washington without engaging in the unauthorized or unlicensed practice of law, but only if the lawyer fully adheres to the same guidelines and restrictions on remote practice. Lawyers licensed in other jurisdictions who are considering practicing from a location in Washington should consult the rules of professional conduct from their state of licensure to determine whether such practice is allowed. *See* RPC 8.5. A lawyer from another jurisdiction who practices remotely from Washington further must comply with all applicable state and local business and tax regulations and any other applicable Washington laws, an issue that exceeds the scope of this opinion.

### III. Complying with the RPCs when Using a Virtual Law Office

Lawyers practicing in a virtual law office are no less bound by their ethical duties than their colleagues practicing in a physical office. The standards of ethical conduct set forth in the RPC apply to all lawyers regardless of the setting: physical or virtual. However, certain duties present special challenges to lawyers practicing in the virtual law setting, including the duties of supervision, confidentiality, avoiding misleading communication, and avoiding conflicts of interest as set forth below.

#### A. Supervision

The duties of supervision embodied in RPC 5.1, 5.2, 5.3 and 5.10, apply in all law offices. But staff and other lawyers in a virtual law office might not share any physical proximity to their supervising lawyer, making direct supervision more difficult. Thus, a lawyer operating remotely may need to take additional measures to adequately supervise staff and other lawyers in his or her employ. A virtual law office often will employ services from vendors outside of the firm, such as computer cloud services, social media and other digital communication services, and document review services. A lawyer also must make reasonable efforts to ensure that these services are provided in a manner that is compatible with the lawyer's professional obligations. RPC 5.3 cmt. [3]. To ensure competent supervision of non-lawyer assistants, a lawyer should become and remain familiar with the necessary features of employed technologies, such as vendor privacy policies and security practices. RPC 1.1 cmt. [8].

Supervising lawyers must be mindful of lawyer employees' and nonlawyer assistants' use of electronic devices. Whether the devices are provided by the supervising lawyer or belong to a lawyer employee or nonlawyer staff, lawyers must take steps to ensure that the devices are securely managed, and that client information is kept confidential.

## B. Confidentiality

RPC 1.6(c) requires a lawyer to make reasonable efforts to prevent the inadvertent or unauthorized disclosure of, or unauthorized access to, information relating the representation of a client. Factors to be considered in determining the reasonableness of the lawyer's efforts include, but are not limited to, the sensitivity of the information, the likelihood of disclosure if additional safeguards are not employed, the cost of employing additional safeguards, the difficulty of implementing additional safeguards, and the extent to which the safeguards adversely affect the lawyer's ability to represent clients. A client may require the lawyer to implement special security measures or may give informed consent to forego security measures. RPC 1.6 cmt. [18]. Similarly, an attorney must take reasonable precautions when transmitting information relating to the client's representation. RPC 1.6 cmt. [19]. Lawyers also are responsible for assessing whether additional security precautions are required to comply with other law, such as state and federal laws that govern data privacy. RPC 1.6 cmt. [19].

The use by a lawyer, whether a virtual office or traditional practitioner, of online data storage maintained by a third-party vendor raises a number of ethical questions because any confidential client information included in the stored data is outside of the direct control of the lawyer. WSBA Advisory Opinion 2215 (2012) addresses the lawyer's ethical obligations under RPC 1.1, 1.6, and 1.15A. A lawyer intending to use online data storage should review that opinion, and be especially mindful of several important points emphasized in the opinion:

- The lawyer as part of a general duty of competence must be able to understand the technology involved sufficiently to be able to evaluate a particular vendor's security and storage systems.
- The lawyer shall be satisfied that the vendor understands and agrees to maintain and secure stored data in conformity with, the lawyer's duty of confidentiality.
- The lawyer shall ensure that the confidentiality of all client data will be maintained, and that client documents stored online will not be lost, e.g., that the vendor will maintain secure back-up storage.
- The storage agreement should give the lawyer prompt notice of non-authorized access to the stored data or other breach of security, and a means of retrieving the data if the agreement is terminated or the vendor goes out of business.
- Because data storage technology, and related threats to the security of such technology, change rapidly, the lawyer must monitor and review regularly the adequacy of the vendor's security systems.

As the opinion concludes, "A lawyer may use online data storage systems to store and back up client confidential information as long as the lawyer takes reasonable care to ensure that the information will remain confidential and the information is secure from risk of loss."



Lawyers in virtual practices may be more likely to communicate with clients by email. As discussed in WSBA Advisory Opinion 2175 (2008), lawyers may communicate with clients by email. However, if the lawyer believes there is a significant risk that a third party will access the communications, such as when the client is using an employer-provided email account, the lawyer has an obligation to advise the clients of the risks of such communication. See WSBA Adv. Op. 2217 (2012).

### C. Duty to Avoid Misrepresentation

Another duty with special implications for lawyers operating virtual law offices is the duty to avoid misrepresentation. RPC 7.1, 8.4(c). As discussed above, a lawyer may not mislead others through communications that imply the existence of a physical office where none exists. Such communications may falsely imply access to the resources that a physical office provides like ready access to meeting spaces or the opportunity meet with the lawyer on a drop-in basis. Unless the lawyer has arranged for such resources, the lawyer may not imply their existence. RPC 7.1.

Similarly, a lawyer may not mislead others through communications that imply the existence of a formal law firm rather than a group of individual lawyers sharing the expenses related to supporting a practice. For example, in the physical office setting, lawyers who are not associated in a firm may house their individual practices in the same building, with each practice paying its share of the overall rent and utilities for the space. These space-sharing lawyers would be prohibited from implying (e.g., via the use of letterhead or signage on the building) that they practice as single law firm. Similarly, lawyers with virtual law offices cannot state or imply on websites, social media, or elsewhere that they are part of a firm if they are not. RPC 7.1 cmt. [13].

### D. Duty to Avoid Conflicts of Interest

A robust conflict checking system is critical to any law office, physical or virtual, to avoid conflicts of interest under RPC 1.6, 1.7, 1.9, and 1.18. A robust conflict checking system will include information on current and former clients, prospective clients, related parties, and adverse parties. The conflict checking system is particularly important in a law firm where an individual firm lawyer's conflicts of interest will be imputed to the rest of the lawyers in the firm. RPC 1.10. In the physical office setting, physical proximity can in some circumstances provide more reliable access to the conflict checking system. Lawyers in a virtual law practice, who most likely do not have the advantage of physical proximity, must ensure that the conflict checking system is equally accessible to all members of the practice, lawyers, and staff, and that such access is reliably maintained.

Lawyers also should take care in the electronic transmission of client information to detect conflicts of interest when the lawyer is considering an association with another firm, two or more firms are considering a merger, or a lawyer is considering the purchase of a law practice. Any such disclosure should ordinarily include no more than the identity of the persons and entities involved, a brief summary of the general issues involved, and information about whether the

matter has terminated, such disclosures made only after substantive discussions regarding the new relationship. RPC 1.6(b)(7) & cmt. [13].

#### IV Other Considerations Regarding the Virtual Law Office

Lawyers practicing virtually must comply with all applicable trust account rules. For example, Washington lawyers under RPC 1.15A cmt. [19] are required to keep trust accounts only with those financial institutions authorized by the Legal Foundation of Washington. A lawyer who holds property while acting solely in a fiduciary capacity, may be subject to the requirements of statute or other law outside of the State of Washington. *See* RPC 1.15A cmt. [3].

Another practical consideration is the Washington lawyer practicing virtually from outside of Washington, must maintain trust account records under RPC 1.15B, and be able to make records available for review or audit by the client or Office of Disciplinary Counsel. *See, e.g.*, ELC 15.1 (random examination of books and records).

Lawyers practicing virtually still need to make and maintain a plan to process paper mail; docket correspondence and communications; and direct or redirect clients, prospective clients or other individuals who might attempt to contact the lawyer at the lawyer's current or previous brick-and-mortar office, on how to contact the attorney. If a lawyer will not be available at a physical office address, there should be signage and/or online instructions that the lawyer is available by appointment only and/or that the posted physical office address is for mail deliveries only.

Finally, although e-filing systems have become more prevalent, attorneys who practice from a virtual office must still be able to file and receive pleadings and other court documents that are not in electronic form.



**To:** Washington State Bar Association Board of Governors  
Washington State Bar Foundation Trustees

**From:** Richard Bird, Treasurer

**Date:** December 27, 2022

**Re:** Treasurer's Report, Year Ending September 30, 2022

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Attached are the un-audited financial statements for the Washington State Bar Foundation (WSBF) for the fiscal year 2022. The WSBA provides staffing, office space and technical support to the Foundation in order for the Foundation to fulfill its mission to support WSBA programs that promote diversity within the legal profession and enhance the public's access to, and understanding of, the justice system. This support includes the time and expertise of WSBA's Controller, who keeps the Foundation's books.

#### **WSBF Cash Fund Balances**

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For the WSBF Cash Fund balances as of September 30, 2022, please see the attached financial statement dated November 23, 2022.

#### **Notes and Comments**

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The Foundation had \$505,975 in income during FY22, which was \$21,898 more (about 4.5% higher) than the prior year. A portion of this was an Access to Justice Conference sponsorship proceeds from FY21 that were received in FY21. Additionally, the Foundation served as fiscal agent for a grant on behalf of the Access to Justice Board.

The Foundation's FY23<sup>1</sup> allocation of \$316,000 for WSBA programs held steady from the previous year – with \$265,000 paid directly to WSBA, and \$51,000 held back to pay FY23 Powerful Communities Project grantees, as well as community members with lived experience to serve on the grant selection panel. Indirect costs (staffing/operating costs provided by WSBA as in-kind support) totaled \$127,622, representing an increase of \$4,718 (<4%) from FY21, due primarily to organization-wide salary adjustments and the reception that the Foundation for the Board of Governors and members of the Spokane community in May.

Despite the ongoing challenges and uncertainty of COVID, WSBA members were more generous than ever with gifts to WSBF during licensing, and many generous firms and individuals made gifts to the Foundation throughout the year.

## **Conclusion**

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In the twelve years since the first professional staff dedicated solely to the Foundation was hired, the Foundation has continued to seek operational efficiencies while expanding its support of WSBA programs. Its financial systems and policies appear appropriate to its current capacity; execution of and updates to the Fund Development and Disbursement and Fiscal Policies will continue to ensure that the Foundation fulfills its mission and that donor wishes are met.

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<sup>1</sup> Funds raised in the previous year are disbursed to WSBA and WSBA grantees for the coming fiscal year.

DRAFT

**WASHINGTON STATE**  
**B A R A S S O C I A T I O N**

# **Financial Reports**

**(Unaudited)**

**Year to Date October 31, 2022**

**Prepared by**

**Maggie Yu, Controller & Darshita Patel, Accountant**

**Submitted by**

**Tiffany Lynch, Director of Finance**

**December 23, 2022**

# WASHINGTON STATE BAR ASSOCIATION

To: Board of Governors  
Budget and Audit Committee

From: Terra Nevitt, Executive Director; Tiffany Lynch, Director of Finance; Maggie Yu, Controller

Re: Key Financial Benchmarks for the Preliminary Fiscal Year to Date (YTD) through October 31, 2022  
As % of Completion to Annual Budget

	% of Year	Current Year % YTD	Current Year \$ Difference Favorable/(Unfavorable)	Prior Year YTD	Comments
Total Salaries & Benefits	8%	8%	\$117,081	8%	On budget with slightly favorable variance due to timing of L & I payments and higher capital labor.
Other Indirect Expenses*	8%	9%	(\$43,420)	9%	On budget with slightly unfavorable variance due to timing of annual payments.
Total Indirect Expenses	8%	8%	\$73,661	8%	On budget resulting from a combination of reasons described above.

General Fund Revenues	8%	9%	\$164,588	9%	Favorable to budget due to higher revenues primarily driven by higher than budgeted interest income and timing of collection for bar exam fees.
General Fund Indirect Expenses	8%	8%	\$68,845	8%	On budget with slightly favorable variance as described under indirect expenses above.
General Fund Direct Expenses	8%	3%	\$129,277	4%	Favorable to budget due to timing of program activities and meetings/events.
General Fund Net	8%	156%	\$362,711	338%	Favorable to budget for the reasons described above.

CLE Revenue	8%	4%	(\$76,658)	6%	Unfavorable to budget due to timing of scheduled seminars and product sales.
CLE Direct Expenses	8%	2%	\$24,708	2%	Favorable to budget due to scheduled timing of seminars and product sales.
CLE Indirect Expenses	8%	8%	\$4,588	8%	On budget with slightly favorable variance as described above
CLE Net	8%	-13%	(\$47,363)	4%	Unfavorable to budget for the reasons described above.

\*Workplace benefits, Human Resources, meeting support, rent, taxes, furniture & maintenance, office supplies, depreciation, insurance, equipment, professional fees (legal & audit), internet & telephone, postage, storage, bank fees, Technology

**Washington State Bar Association Financial Summary**  
**Compared to Fiscal Year 2023 Budget**  
**For the Period from October 1, 2022 to October 31, 2022**

Category	Actual Revenues	Budgeted Revenues	Actual Indirect Expenses	Budgeted Indirect Expenses	Actual Direct Expenses	Budgeted Direct Expenses	Actual Total Expenses	Budgeted Total Expenses	Actual Net Result	Budgeted Net Result
Access to Justice	-	-	19,760	237,082	12,882	121,820	32,641	358,902	(32,641)	(358,902)
Admissions/Bar Exam	262,035	1,362,940	76,178	892,773	4,394	411,079	80,572	1,303,852	181,463	59,088
Advancement FTE	-	-	28,608	354,465	198	8,100	28,806	362,565	(28,806)	(362,565)
Bar News	43,185	602,700	27,584	332,507	34,976	363,460	62,560	695,967	(19,375)	(93,267)
Board of Governors	-	-	15,954	191,700	6,714	371,900	22,668	563,600	(22,668)	(563,600)
Character & Fitness Board	-	-	11,532	139,623	-	27,000	11,532	166,623	(11,532)	(166,623)
Communications Strategies	113	3,500	56,382	674,814	337	116,015	56,719	790,829	(56,606)	(787,329)
Communications Strategies FTE	-	-	20,221	243,400	-	-	20,221	243,400	(20,221)	(243,400)
Discipline	8,881	119,000	471,759	6,007,729	3,145	206,999	474,904	6,214,728	(466,024)	(6,095,728)
Diversity	-	135,000	18,194	373,692	270	121,535	18,464	495,227	(18,464)	(360,227)
Finance	32,931	26,000	78,585	1,080,720	360	13,500	78,945	1,094,220	(46,014)	(1,068,220)
Foundation	-	-	12,170	147,147	24	5,650	12,194	152,797	(12,194)	(152,797)
Human Resources	-	-	48,317	291,667	-	-	48,317	291,667	(48,317)	(291,667)
Law Clerk Program	900	188,200	11,068	138,099	1,110	8,900	12,179	146,999	(11,279)	41,201
Legislative	-	-	15,519	242,681	798	26,783	16,317	269,464	(16,317)	(269,464)
Legal Lunchbox	2,352	23,000	4,089	51,117	-	1,500	4,089	52,617	(1,737)	(29,617)
Licensing and Membership Records	26,670	452,200	51,810	622,311	99	19,651	51,909	641,962	(25,239)	(189,762)
Licensing Fees	1,396,768	17,053,467	-	-	-	-	0	-	1,396,768	17,053,467
Limited License Legal Technician	1,167	29,722	6,787	85,248	866	15,500	7,653	100,748	(6,485)	(71,026)
Limited Practice Officers	23,193	195,088	7,911	99,305	-	21,042	7,911	120,347	15,282	74,741
Mandatory CLE	87,075	1,125,250	65,091	714,329	1,679	67,015	66,770	781,344	20,305	343,906
Member Wellness Program	-	7,500	14,253	234,719	100	2,800	14,353	237,519	(14,353)	(230,019)
Member Services & Engagement	35	11,800	24,735	302,978	1,460	39,500	26,195	342,478	(26,160)	(330,678)
Mini CLE	-	-	9,454	114,412	-	-	9,454	114,412	(9,454)	(114,412)
New Member Education	11,439	85,000	7,850	95,269	-	1,600	7,850	96,869	3,589	(11,869)
Office of General Counsel	-	963	78,540	1,038,134	1,178	19,400	79,718	1,057,534	(79,718)	(1,056,571)
Office of the Executive Director	-	-	33,324	568,259	8,526	128,775	41,850	697,034	(41,850)	(697,034)
OGC-Disciplinary Board	-	-	18,031	217,139	6,750	112,000	24,781	329,139	(24,781)	(329,139)
Practice of Law Board	-	-	5,247	63,355	-	12,000	5,247	75,355	(5,247)	(75,355)
Practice Management Assistance	-	50,000	11,035	133,033	-	73,400	11,035	206,433	(11,035)	(156,433)
Professional Responsibility Program	-	-	18,812	151,321	267	2,250	19,080	153,571	(19,080)	(153,571)
Public Service Programs	-	130,000	18,136	219,329	457	266,928	18,593	486,257	(18,593)	(356,257)
Publication and Design Services	-	-	9,909	119,175	4,100	4,612	14,009	123,787	(14,009)	(123,787)
Regulatory Services FTE	-	-	38,201	536,908	-	23,550	38,201	560,458	(38,201)	(560,458)
Sections Administration	92,166	290,543	24,080	290,746	-	7,850	24,080	298,596	68,086	(8,053)
Service Center	-	-	58,868	703,381	387	10,300	59,255	713,681	(59,255)	(713,681)
Volunteer Engagement	-	-	8,088	97,639	500	17,850	8,588	115,489.27	(8,588)	(115,489)
Technology	-	-	155,306	1,996,602	-	-	155,306	1,996,602	(155,306)	(1,996,602)
<b>Subtotal General Fund</b>	<b>1,988,911</b>	<b>21,891,872</b>	<b>1,581,389</b>	<b>19,802,808</b>	<b>91,578</b>	<b>2,650,264</b>	<b>1,672,966</b>	<b>22,453,072</b>	<b>315,944</b>	<b>(561,199)</b>
Expenses using reserve funds									-	-
<b>Total General Fund - Net Result from Operations</b>									<b>315,944</b>	<b>(561,199)</b>
<b>Percentage of Budget</b>	<b>0</b>		<b>8%</b>		<b>3%</b>		<b>7%</b>			
CLE-Seminars and Products	81,236	1,653,725	85,521	1,079,536	6,587	307,219	92,108	1,386,755	(10,872)	266,970
CLE - Deskbooks	-	241,000	18,387	222,410	-	68,325	18,387	290,735	(18,387)	(49,735)
Total CLE	81,236	1,894,725	103,908	1,301,946	6,587	375,544	110,495	1,677,490	(29,260)	217,235
<b>Percentage of Budget</b>	<b>0</b>		<b>8%</b>		<b>2%</b>		<b>7%</b>			
Total All Sections	140,900	649,695	-	-	106,125	904,646	106,125	904,646	34,775	(254,951)
Client Protection Fund-Restricted	17,607	730,000	14,931	181,912	190	502,300	15,121	684,212	2,486	45,788
<b>Totals</b>	<b>2,228,653</b>	<b>25,166,292</b>	<b>1,700,228</b>	<b>21,286,666</b>	<b>204,480</b>	<b>4,432,754</b>	<b>1,904,708</b>	<b>25,719,419</b>	<b>323,946</b>	<b>(553,127)</b>
<b>Percentage of Budget</b>	<b>0</b>		<b>8%</b>		<b>5%</b>		<b>7%</b>			

Summary of Fund Balances:	Fund Balances Sept. 30, 2022	2023 Budgeted Fund Balances	Fund Balances Year to date
<b>Restricted Funds:</b>			
Client Protection Fund	4,063,501	4,109,289	4,065,988
<b>Board-Designated Funds (Non-General Fund):</b>			
CLE Fund Balance	1,042,049	1,259,284	1,012,789
Section Funds	1,802,650	1,547,699	1,837,424
<b>Board-Designated Funds (General Fund):</b>			
Operating Reserve Fund	2,000,000	2,000,000	2,000,000
Facilities Reserve Fund	1,000,000	1,000,000	1,000,000
<b>Unrestricted Funds (General Fund):</b>			
Unrestricted General Fund	5,713,268	3,452,068	6,029,212
<b>Total General Fund Balance</b>	<b>8,713,268</b>	<b>6,452,068</b>	<b>9,029,212</b>
<b>Net Change in Total General Fund Balance</b>		<b>(2,261,199)</b>	<b>315,944</b>
<b>Total Fund Balance</b>	<b>15,621,468</b>	<b>13,368,341</b>	<b>15,945,413</b>
<b>Net Change In Fund Balance</b>		<b>(2,253,127)</b>	<b>323,946</b>

**Washington State Bar Association**

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	<b>FISCAL 2023 BUDGET</b>	<b>CURRENT MONTH</b>	<b>YEAR TO DATE</b>	<b>REMAINING BALANCE</b>	<b>% USED OF BUDGET</b>	<b>YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)</b>
<b>LICENSE FEES</b>						
<b>REVENUE:</b>						
LICENSE FEES	17,053,467	1,396,768	1,396,768	15,656,699	8%	24,354
<b>TOTAL REVENUE:</b>	<b>17,053,467</b>	<b>1,396,768</b>	<b>1,396,768</b>	<b>15,656,699</b>	<b>8%</b>	<b>(24,354)</b>



## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>ACCESS TO JUSTICE</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
SURVEYS	100	-	-	100	0%	8
ATJ BOARD RETREAT	2,000	1,862	1,862	138	93%	(1,696)
LEADERSHIP TRAINING	2,000	-	-	2,000	0%	167
ATJ BOARD EXPENSE	78,400	11,000	11,000	67,400	14%	(4,467)
STAFF TRAVEL/PARKING	3,000	19	19	2,981	1%	231
STAFF CONFERENCE & TRAINING	1,675	-	-	1,675	0%	140
PUBLIC DEFENSE	4,000	-	-	4,000	0%	333
CONFERENCE/INSTITUTE EXPENSE	23,145	-	-	23,145	0%	1,929
RECEPTION/FORUM EXPENSE	7,500	-	-	7,500	0%	625
<b>TOTAL DIRECT EXPENSES:</b>	<b>121,820</b>	<b>12,882</b>	<b>12,882</b>	<b>108,938</b>	<b>11%</b>	<b>(2,730)</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.64 FTE)	138,139	11,463	11,463	126,677	8%	49
BENEFITS EXPENSE	48,192	3,568	3,568	44,624	7%	448
OTHER INDIRECT EXPENSE	50,751	4,729	4,729	46,022	9%	(500)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>237,082</b>	<b>19,760</b>	<b>19,760</b>	<b>217,322</b>	<b>8%</b>	<b>(3)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>358,902</b>	<b>32,641</b>	<b>32,641</b>	<b>326,260</b>	<b>9%</b>	<b>(2,733)</b>
<b>NET INCOME (LOSS):</b>	<b>(358,902)</b>	<b>(32,641)</b>	<b>(32,641)</b>	<b>(326,260)</b>	<b>9%</b>	<b>(2,733)</b>

**Washington State Bar Association**  
Statement of Activities  
For the Period from October 1, 2022 to October 31, 2022  
**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>ADMISSIONS</b>						
<b>REVENUE:</b>						
EXAM SOFT REVENUE	27,000	-	-	27,000	0%	(2,250)
BAR EXAM FEES	1,253,000	258,810	258,810	994,190	21%	154,393
RULE 9/LEGAL INTERN FEES	12,000	500	500	11,500	4%	(500)
SPECIAL ADMISSIONS	70,940	2,725	2,725	68,215	4%	(3,187)
<b>TOTAL REVENUE:</b>	<b>1,362,940</b>	<b>262,035</b>	<b>262,035</b>	<b>1,100,905</b>	<b>19%</b>	<b>148,457</b>
<b>DIRECT EXPENSES:</b>						
POSTAGE	750	-	-	750	0%	63
STAFF TRAVEL/PARKING	23,000	-	-	23,000	0%	1,917
STAFF MEMBERSHIP DUES	600	150	150	450	25%	(100)
SUPPLIES	2,750	-	-	2,750	0%	229
FACILITY, PARKING, FOOD	101,000	-	-	101,000	0%	8,417
EXAMINER FEES	36,000	2,000	2,000	34,000	6%	1,000
UBE EXMINATIONS	123,000	-	-	123,000	0%	10,250
BOARD OF BAR EXAMINERS	18,850	-	-	18,850	0%	1,571
BAR EXAM PROCTORS	39,000	-	-	39,000	0%	3,250
DISABILITY ACCOMMODATIONS	27,000	-	-	27,000	0%	2,250
CHARACTER & FITNESS INVESTIGATIONS	2,000	-	-	2,000	0%	167
LAW SCHOOL VISITS	1,700	206	206	1,494	12%	(64)
DEPRECIATION-SOFTWARE	24,929	2,038	2,038	22,891	8%	39
STAFF CONFERENCE & TRAINING	10,500	-	-	10,500	0%	875
<b>TOTAL DIRECT EXPENSES:</b>	<b>411,079</b>	<b>4,394</b>	<b>4,394</b>	<b>406,685</b>	<b>1%</b>	<b>29,863</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (6.75 FTE)	512,745	41,901	41,901	470,844	8%	828
BENEFITS EXPENSE	171,146	14,793	14,793	156,353	9%	(531)
OTHER INDIRECT EXPENSE	208,882	19,484	19,484	189,398	9%	(2,077)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>892,773</b>	<b>76,178</b>	<b>76,178</b>	<b>816,595</b>	<b>9%</b>	<b>(1,780)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>1,303,852</b>	<b>80,572</b>	<b>80,572</b>	<b>1,223,281</b>	<b>6%</b>	<b>28,083</b>
<b>NET INCOME (LOSS):</b>	<b>59,088</b>	<b>181,463</b>	<b>181,463</b>	<b>(122,376)</b>	<b>307%</b>	<b>176,539</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>ADVANCEMENT FTE</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
STAFF CONFERENCE & TRAINING	8,100	198	198	7,902	2%	477
<b>TOTAL DIRECT EXPENSES:</b>	<b>8,100</b>	<b>198</b>	<b>198</b>	<b>7,902</b>	<b>2%</b>	<b>477</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.88 FTE)	233,777	18,455	18,455	215,321	8%	1,026
BENEFITS EXPENSE	62,511	4,732	4,732	57,779	8%	477
OTHER INDIRECT EXPENSE	58,178	5,420	5,420	52,757	9%	(572)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>354,465</b>	<b>28,608</b>	<b>28,608</b>	<b>325,857</b>	<b>8%</b>	<b>931</b>
<b>TOTAL ALL EXPENSES:</b>	<b>362,565</b>	<b>28,806</b>	<b>28,806</b>	<b>333,759</b>	<b>8%</b>	<b>1,408</b>
<b>NET INCOME (LOSS):</b>	<b>(362,565)</b>	<b>(28,806)</b>	<b>(28,806)</b>	<b>(333,759)</b>	<b>8%</b>	<b>1,408</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>BAR NEWS</b>						
<b>REVENUE:</b>						
DISPLAY ADVERTISING	400,000	42,000	42,000	358,000	11%	8,667
SUBSCRIPT/SINGLE ISSUES	200	-	-	200	0%	(17)
CLASSIFIED ADVERTISING	2,500	1,185	1,185	1,315	47%	977
JOB TARGET ADVERTISING	200,000	-	-	200,000	0%	(16,667)
<b>TOTAL REVENUE:</b>	<b>602,700</b>	<b>43,185</b>	<b>43,185</b>	<b>559,515</b>	<b>7%</b>	<b>(7,040)</b>
<b>DIRECT EXPENSES:</b>						
POSTAGE	110,000	10,916	10,916	99,084	10%	(1,749)
PRINTING, COPYING & MAILING	250,000	24,060	24,060	225,940	10%	(3,227)
DIGITAL/ONLINE DEVELOPMENT	1,000	-	-	1,000	0%	83
GRAPHICS/ARTWORK	100	-	-	100	0%	8
STAFF CONFERENCE & TRAINING	2,000	-	-	2,000	0%	167
STAFF MEMBERSHIP DUES	135	-	-	135	0%	11
SUBSCRIPTIONS	225	-	-	225	0%	19
<b>TOTAL DIRECT EXPENSES:</b>	<b>363,460</b>	<b>34,976</b>	<b>34,976</b>	<b>328,484</b>	<b>10%</b>	<b>(4,688)</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (2.23 FTE)	209,396	17,106	17,106	192,290	8%	344
BENEFITS EXPENSE	54,103	4,038	4,038	50,065	7%	470
OTHER INDIRECT EXPENSE	69,008	6,440	6,440	62,568	9%	(690)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>332,507</b>	<b>27,584</b>	<b>27,584</b>	<b>304,923</b>	<b>8%</b>	<b>125</b>
<b>TOTAL ALL EXPENSES:</b>	<b>695,967</b>	<b>62,560</b>	<b>62,560</b>	<b>633,407</b>	<b>9%</b>	<b>(4,563)</b>
<b>NET INCOME (LOSS):</b>	<b>(93,267)</b>	<b>(19,375)</b>	<b>(19,375)</b>	<b>(73,892)</b>	<b>21%</b>	<b>(11,603)</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>BOARD OF GOVERNORS</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
BOG MEETINGS	205,000	74	74	204,926	0%	17,009
BOG COMMITTEES' EXPENSES	7,000	-	-	7,000	0%	583
BOG RETREAT	50,000	-	-	50,000	0%	4,167
BOG CONFERENCE ATTENDANCE	43,000	-	-	43,000	0%	3,583
BOG TRAVEL & OUTREACH	10,000	4,251	4,251	5,749	43%	(3,418)
LEADERSHIP TRAINING	20,000	-	-	20,000	0%	1,667
BOG ELECTIONS	26,900	-	-	26,900	0%	2,242
PRESIDENT'S DINNER	10,000	-	-	10,000	0%	833
CONSULTING SERVICES	-	2,389	2,389	(2,389)		(2,389)
<b>TOTAL DIRECT EXPENSES:</b>	<b>371,900</b>	<b>6,714</b>	<b>6,714</b>	<b>365,186</b>	<b>2%</b>	<b>24,278</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.40 FTE)	112,271	9,279	9,279	102,991	8%	77
BENEFITS EXPENSE	36,105	2,640	2,640	33,466	7%	369
OTHER INDIRECT EXPENSE	43,324	4,035	4,035	39,288	9%	(425)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>191,700</b>	<b>15,954</b>	<b>15,954</b>	<b>175,746</b>	<b>8%</b>	<b>21</b>
<b>TOTAL ALL EXPENSES:</b>	<b>563,600</b>	<b>22,668</b>	<b>22,668</b>	<b>540,932</b>	<b>4%</b>	<b>24,298</b>
<b>NET INCOME (LOSS):</b>	<b>(563,600)</b>	<b>(22,668)</b>	<b>(22,668)</b>	<b>(540,932)</b>	<b>4%</b>	<b>24,298</b>

**Washington State Bar Association**  
Statement of Activities  
For the Period from October 1, 2022 to October 31, 2022  
**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>CHARACTER &amp; FITNESS BOARD</b>						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CHARACTER & FITNESS BOARD EXP	12,000	-	-	12,000	0%	1,000
COURT REPORTERS	15,000	-	-	15,000	0%	1,250
<b>TOTAL DIRECT EXPENSES:</b>	<b>27,000</b>	<b>-</b>	<b>-</b>	<b>27,000</b>	<b>0%</b>	<b>2,250</b>
INDIRECT EXPENSES:						
SALARY EXPENSE (0.75 FTE)	90,551	7,462	7,462	83,089	8%	84
BENEFITS EXPENSE	25,863	1,907	1,907	23,955	7%	248
OTHER INDIRECT EXPENSE	23,209	2,162	2,162	21,047	9%	(228)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>139,623</b>	<b>11,532</b>	<b>11,532</b>	<b>128,091</b>	<b>8%</b>	<b>104</b>
<b>TOTAL ALL EXPENSES:</b>	<b>166,623</b>	<b>11,532</b>	<b>11,532</b>	<b>155,091</b>	<b>7%</b>	<b>2,354</b>
<b>NET INCOME (LOSS):</b>	<b>(166,623)</b>	<b>(11,532)</b>	<b>(11,532)</b>	<b>(155,091)</b>	<b>7%</b>	<b>2,354</b>

**Washington State Bar Association**  
Statement of Activities  
For the Period from October 1, 2022 to October 31, 2022  
**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>LAW CLERK PROGRAM</b>						
<b>REVENUE:</b>						
LAW CLERK FEES	185,000	1,000	1,000	184,000	1%	(14,417)
LAW CLERK APPLICATION FEES	3,200	(100)	(100)	3,300	-3%	(367)
<b>TOTAL REVENUE:</b>	<b>188,200</b>	<b>900</b>	<b>900</b>	<b>187,300</b>	<b>0%</b>	<b>(14,783)</b>
<b>DIRECT EXPENSES:</b>						
SUBSCRIPTIONS	250	-	-	250	0%	21
CHARACTER & FITNESS INVESTIGATIONS	100	-	-	100	0%	8
LAW CLERK BOARD EXPENSE	8,000	1,110	1,110	6,890	14%	(444)
LAW CLERK OUTREACH	550	-	-	550	0%	46
<b>TOTAL DIRECT EXPENSES:</b>	<b>8,900</b>	<b>1,110</b>	<b>1,110</b>	<b>7,790</b>	<b>12%</b>	<b>(369)</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (0.98 FTE)	82,442	6,418	6,418	76,024	8%	452
BENEFITS EXPENSE	25,330	1,838	1,838	23,492	7%	273
OTHER INDIRECT EXPENSE	30,327	2,813	2,813	27,514	9%	(285)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>138,099</b>	<b>11,068</b>	<b>11,068</b>	<b>127,030</b>	<b>8%</b>	<b>440</b>
<b>TOTAL ALL EXPENSES:</b>	<b>146,999</b>	<b>12,179</b>	<b>12,179</b>	<b>134,820</b>	<b>8%</b>	<b>71</b>
<b>NET INCOME (LOSS):</b>	<b>41,201</b>	<b>(11,279)</b>	<b>(11,279)</b>	<b>52,480</b>	<b>-27%</b>	<b>(14,712)</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>CLE - PRODUCTS</b>						
<b>REVENUE:</b>						
SHIPPING & HANDLING	100	9	9	91	9%	1
COURSEBOOK SALES	7,000	70	70	6,930	1%	(513)
MP3 AND VIDEO SALES	910,000	57,644	57,644	852,356	6%	(18,189)
<b>TOTAL REVENUE:</b>	<b>917,100</b>	<b>57,723</b>	<b>57,723</b>	<b>859,377</b>	<b>6%</b>	<b>(18,702)</b>
<b>DIRECT EXPENSES:</b>						
DEPRECIATION	1,309	279	279	1,030	21%	(170)
STAFF MEMBERSHIP DUES	200	-	-	200	0%	17
COST OF SALES - COURSEBOOKS	690	3	3	687	0%	54
A/V DEVELOP COSTS (RECORDING)	1,250	-	-	1,250	0%	104
ONLINE PRODUCT HOSTING EXPENSES	53,000	2,441	2,441	50,559	5%	1,976
DISABILITY ACCOMMODATIONS	2,000	-	-	2,000	0%	167
STAFF CONFERENCE & TRAINING	300	-	-	300	0%	25
<b>TOTAL DIRECT EXPENSES:</b>	<b>58,749</b>	<b>2,723</b>	<b>2,723</b>	<b>56,026</b>	<b>5%</b>	<b>2,173</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.30 FTE)	93,769	4,417	4,417	89,352	5%	3,397
BENEFITS EXPENSE	36,718	2,684	2,684	34,035	7%	376
OTHER INDIRECT EXPENSE	41,778	3,748	3,748	38,030	9%	(267)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>172,265</b>	<b>10,849</b>	<b>10,849</b>	<b>161,416</b>	<b>6%</b>	<b>3,506</b>
<b>TOTAL ALL EXPENSES:</b>	<b>231,014</b>	<b>13,572</b>	<b>13,572</b>	<b>217,442</b>	<b>6%</b>	<b>5,679</b>
<b>NET INCOME (LOSS):</b>	<b>686,086</b>	<b>44,151</b>	<b>44,151</b>	<b>641,935</b>	<b>6%</b>	<b>(13,023)</b>



## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>CLE - SEMINARS</b>						
<b>REVENUE:</b>						
SEMINAR REGISTRATIONS	850,000	23,513	23,513	826,487	3%	(47,321)
SEMINAR-EXHIB/SPNSR/ETC	20,000	-	-	20,000	0%	(1,667)
SEMINAR SPLITS W/ CLE	(133,375)	-	-	(133,375)	0%	11,115
<b>TOTAL REVENUE:</b>	<b>736,625</b>	<b>23,513</b>	<b>23,513</b>	<b>713,112</b>	<b>3%</b>	<b>(37,873)</b>
<b>DIRECT EXPENSES:</b>						
STAFF TRAVEL/PARKING	15,000	-	-	15,000	0%	1,250
STAFF MEMBERSHIP DUES	1,500	-	-	1,500	0%	125
COURSEBOOK PRODUCTION	1,000	-	-	1,000	0%	83
POSTAGE - FLIERS/CATALOGS	5,000	-	-	5,000	0%	417
ACCREDITATION FEES	3,000	(36)	(36)	3,036	-1%	286
SEMINAR BROCHURES	20,000	-	-	20,000	0%	1,667
FACILITIES	165,200	3,900	3,900	161,300	2%	9,867
SPEAKERS & PROGRAM DEVELOP	32,000	-	-	32,000	0%	2,667
HONORARIA	1,200	-	-	1,200	0%	100
CLE SEMINAR COMMITTEE	200	-	-	200	0%	17
DISABILITY ACCOMODATIONS	2,000	-	-	2,000	0%	167
STAFF CONFERENCE & TRAINING	2,370	-	-	2,370	0%	198
<b>TOTAL DIRECT EXPENSES:</b>	<b>248,470</b>	<b>3,864</b>	<b>3,864</b>	<b>244,606</b>	<b>2%</b>	<b>16,842</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (6.83 FTE)	502,652	41,198	41,198	461,454	8%	690
BENEFITS EXPENSE	183,351	13,746	13,746	169,605	7%	1,534
OTHER INDIRECT EXPENSE	221,267	19,728	19,728	201,539	9%	(1,289)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>907,270</b>	<b>74,672</b>	<b>74,672</b>	<b>832,598</b>	<b>8%</b>	<b>934</b>
<b>TOTAL ALL EXPENSES:</b>	<b>1,155,740</b>	<b>78,536</b>	<b>78,536</b>	<b>1,077,204</b>	<b>7%</b>	<b>17,776</b>
<b>NET INCOME (LOSS):</b>	<b>(419,115)</b>	<b>(55,023)</b>	<b>(55,023)</b>	<b>(364,092)</b>	<b>13%</b>	<b>(20,097)</b>

**Washington State Bar Association**  
Statement of Activities  
For the Period from October 1, 2022 to October 31, 2022  
**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>CONTINUING LEGAL EDUCATION (CLE)</b>						
<b>REVENUE:</b>						
SEMINAR REGISTRATIONS	850,000	23,513	23,513	826,487	3%	(47,321)
SEMINAR REVENUE-OTHER	20,000	-	-	20,000	0%	(1,667)
SEMINAR SPLITS W/ CLE	(133,375)	-	-	(133,375)	0%	11,115
SHIPPING & HANDLING	100	9	9	91	9%	1
COURSEBOOK SALES	7,000	70	70	6,930	1%	(513)
MP3 AND VIDEO SALES	910,000	57,644	57,644	852,356	6%	(18,189)
<b>TOTAL REVENUE:</b>	<b>1,653,725</b>	<b>81,236</b>	<b>81,236</b>	<b>1,572,489</b>	<b>5%</b>	<b>(37,873)</b>
<b>DIRECT EXPENSES:</b>						
COURSEBOOK PRODUCTION	1,000	-	-	1,000	0%	83
POSTAGE - FLIERS/CATALOGS	5,000	-	-	5,000	0%	417
DEPRECIATION	1,309	279	279	1,030	21%	(170)
ONLINE EXPENSES	53,000	2,441	2,441	50,559	5%	1,976
ACCREDITATION FEES	3,000	(36)	(36)	3,036	-1%	286
SEMINAR BROCHURES	20,000	-	-	20,000	0%	1,667
FACILITIES	165,200	3,900	3,900	161,300	2%	9,867
DISABILITY ACCOMMODATIONS	4,000	-	-	4,000	0%	333
SPEAKERS & PROGRAM DEVELOP	32,000	-	-	32,000	0%	2,667
HONORARIA	1,200	-	-	1,200	0%	100
CLE SEMINAR COMMITTEE	200	-	-	200	0%	17
STAFF TRAVEL/PARKING	15,000	-	-	15,000	0%	1,250
STAFF CONFERENCE & TRAINING	2,370	-	-	2,370	0%	198
STAFF MEMBERSHIP DUES	1,700	-	-	1,700	0%	142
COST OF SALES - COURSEBOOKS	690	3	3	687	0%	54
A/V DEVELOP COSTS (RECORDING)	1,250	-	-	1,250	0%	104
STAFF TRAVEL/PARKING	300	-	-	300	0%	25
<b>TOTAL DIRECT EXPENSES:</b>	<b>307,219</b>	<b>6,587</b>	<b>6,587</b>	<b>300,632</b>	<b>2%</b>	<b>19,015</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (8.13 FTE)	596,422	45,615	45,615	550,807	8%	4,087
BENEFITS EXPENSE	220,069	16,429	16,429	203,640	7%	1,910
OTHER INDIRECT EXPENSE	263,045	23,477	23,477	239,568	9%	(1,556)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>1,079,536</b>	<b>85,521</b>	<b>85,521</b>	<b>994,015</b>	<b>8%</b>	<b>4,440</b>
<b>TOTAL ALL EXPENSES:</b>	<b>1,386,755</b>	<b>92,108</b>	<b>92,108</b>	<b>1,294,647</b>	<b>7%</b>	<b>23,455</b>
<b>NET INCOME (LOSS):</b>	<b>266,970</b>	<b>(10,872)</b>	<b>(10,872)</b>	<b>277,843</b>	<b>-4%</b>	<b>(33,120)</b>

**Washington State Bar Association**

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	<b>FISCAL 2023 BUDGET</b>	<b>CURRENT MONTH</b>	<b>YEAR TO DATE</b>	<b>REMAINING BALANCE</b>	<b>% USED OF BUDGET</b>	<b>YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)</b>
<b>COMMUNICATION STRATEGIES</b>						
<b>FTE</b>						
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.00 FTE)	168,213	13,983	13,983	154,231	8%	35
BENEFITS EXPENSE	44,241	3,345	3,345	40,896	8%	342
OTHER INDIRECT EXPENSE	30,946	2,894	2,894	28,052	9%	(315)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>243,400</b>	<b>20,221</b>	<b>20,221</b>	<b>223,179</b>	<b>8%</b>	<b>62</b>
<b>NET INCOME (LOSS):</b>	<b>(243,400)</b>	<b>(20,221)</b>	<b>(20,221)</b>	<b>(223,179)</b>	<b>8%</b>	<b>62</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>COMMUNICATION STRATEGIES</b>						
<b>REVENUE:</b>						
SPONSORSHIPS	1,000	-	-	1,000	0%	(83)
WSBA LOGO MERCHANDISE SALES	2,500	113	113	2,387	5%	(95)
<b>TOTAL REVENUE:</b>	<b>3,500</b>	<b>113</b>	<b>113</b>	<b>3,387</b>	<b>3%</b>	<b>(178)</b>
<b>DIRECT EXPENSES:</b>						
STAFF TRAVEL/PARKING	3,395	198	198	3,197	6%	85
STAFF MEMBERSHIP DUES	1,120	-	-	1,120	0%	93
SUBSCRIPTIONS	4,000	139	139	3,861	3%	194
APEX DINNER	47,000	-	-	47,000	0%	3,917
50 YEAR MEMBER TRIBUTE LUNCH	20,000	-	-	20,000	0%	1,667
BAR OUTREACH	18,000	-	-	18,000	0%	1,500
COMMUNICATIONS OUTREACH	15,000	-	-	15,000	0%	1,250
STAFF CONFERENCE & TRAINING	7,500	-	-	7,500	0%	625
<b>TOTAL DIRECT EXPENSES:</b>	<b>116,015</b>	<b>337</b>	<b>337</b>	<b>115,678</b>	<b>0%</b>	<b>9,331</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (5.20 FTE)	387,612	31,891	31,891	355,722	8%	410
BENEFITS EXPENSE	126,285	9,451	9,451	116,834	7%	1,073
OTHER INDIRECT EXPENSE	160,917	15,041	15,041	145,876	9%	(1,631)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>674,814</b>	<b>56,382</b>	<b>56,382</b>	<b>618,432</b>	<b>8%</b>	<b>(148)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>790,829</b>	<b>56,719</b>	<b>56,719</b>	<b>734,110</b>	<b>7%</b>	<b>9,183</b>
<b>NET INCOME (LOSS):</b>	<b>(787,329)</b>	<b>(56,606)</b>	<b>(56,606)</b>	<b>(730,723)</b>	<b>7%</b>	<b>9,005</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>CLIENT PROTECTION FUND</b>						
<b>REVENUE:</b>						
CPF RESTITUTION	40,000	811	811	39,189	2%	(2,522)
CPF MEMBER ASSESSMENTS	690,000	5,880	5,880	684,120	1%	(51,620)
INTEREST INCOME	-	10,916	10,916	(10,916)		10,916
<b>TOTAL REVENUE:</b>	<b>730,000</b>	<b>17,607</b>	<b>17,607</b>	<b>712,393</b>	<b>2%</b>	<b>(43,226)</b>
<b>DIRECT EXPENSES:</b>						
BANK FEES - WELLS FARGO	2,100	190	190	1,910	9%	(15)
GIFTS TO INJURED CLIENTS	500,000	-	-	500,000	0%	41,667
STAFF MEMBERSHIP DUES	200	-	-	200	0%	17
<b>TOTAL DIRECT EXPENSES:</b>	<b>502,300</b>	<b>190</b>	<b>190</b>	<b>502,110</b>	<b>0%</b>	<b>41,668</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.23 FTE)	104,797	8,667	8,667	96,131	8%	66
BENEFITS EXPENSE	37,207	2,718	2,718	34,489	7%	383
OTHER INDIRECT EXPENSE	39,907	3,546	3,546	36,361	9%	(221)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>181,912</b>	<b>14,931</b>	<b>14,931</b>	<b>166,981</b>	<b>8%</b>	<b>228</b>
<b>TOTAL ALL EXPENSES:</b>	<b>684,212</b>	<b>15,121</b>	<b>15,121</b>	<b>669,091</b>	<b>2%</b>	<b>41,897</b>
<b>NET INCOME (LOSS):</b>	<b>45,788</b>	<b>2,486</b>	<b>2,486</b>	<b>43,302</b>	<b>5%</b>	<b>(1,330)</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>DESKBOOKS</b>						
<b>REVENUE:</b>						
DESKBOOK SALES	150,000	-	-	150,000	0%	(12,500)
LEXIS/NEXIS ROYALTIES	35,000	-	-	35,000	0%	(2,917)
SECTION PUBLICATION SALES	6,000	-	-	6,000	0%	(500)
CASEMAKER ROYALTIES	50,000	-	-	50,000	0%	(4,167)
<b>TOTAL REVENUE:</b>	<b>241,000</b>	<b>-</b>	<b>-</b>	<b>241,000</b>	<b>0%</b>	<b>(20,083)</b>
<b>DIRECT EXPENSES:</b>						
COST OF SALES - DESKBOOKS	65,000	-	-	65,000	0%	5,417
COST OF SALES - SECTION PUBLICATION	1,500	-	-	1,500	0%	125
SPLITS TO SECTIONS	300	-	-	300	0%	25
DESKBOOK ROYALTIES	300	-	-	300	0%	25
STAFF CONFRENCES & TRAINING	1,000	-	-	1,000	0%	83
STAFF MEMBERSHIP DUES	225	-	-	225	0%	19
<b>TOTAL DIRECT EXPENSES:</b>	<b>68,325</b>	<b>-</b>	<b>-</b>	<b>68,325</b>	<b>0%</b>	<b>5,694</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.50 FTE)	132,287	10,971	10,971	121,316	8%	53
BENEFITS EXPENSE	41,948	3,096	3,096	38,852	7%	400
OTHER INDIRECT EXPENSE	48,175	4,321	4,321	43,855	9%	(306)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>222,410</b>	<b>18,387</b>	<b>18,387</b>	<b>204,023</b>	<b>8%</b>	<b>147</b>
<b>TOTAL ALL EXPENSES:</b>	<b>290,735</b>	<b>18,387</b>	<b>18,387</b>	<b>272,348</b>	<b>6%</b>	<b>5,841</b>
<b>NET INCOME (LOSS):</b>	<b>(49,735)</b>	<b>(18,387)</b>	<b>(18,387)</b>	<b>(31,348)</b>	<b>37%</b>	<b>(14,243)</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>DISCIPLINE</b>						
<b>REVENUE:</b>						
AUDIT REVENUE	1,000	191	191	809	19%	108
RECOVERY OF DISCIPLINE COSTS	100,000	7,039	7,039	92,961	7%	(1,294)
DISCIPLINE HISTORY SUMMARY	18,000	1,650	1,650	16,350	9%	150
<b>TOTAL REVENUE:</b>	<b>119,000</b>	<b>8,881</b>	<b>8,881</b>	<b>110,119</b>	<b>7%</b>	<b>(1,036)</b>
<b>DIRECT EXPENSES:</b>						
DEPRECIATION-SOFTWARE	45,835	-	-	45,835	0%	3,820
PUBLICATIONS PRODUCTION	200	169	169	31	84%	(152)
STAFF TRAVEL/PARKING	20,000	612	612	19,388	3%	1,055
STAFF MEMBERSHIP DUES	7,610	500	500	7,110	7%	134
TELEPHONE	2,359	315	315	2,044	13%	(119)
COURT REPORTERS	60,000	495	495	59,505	1%	4,505
OUTSIDE COUNSEL/AIC	1,500	-	-	1,500	0%	125
LITIGATION EXPENSES	25,000	527	527	24,473	2%	1,556
DISABILITY EXPENSES	9,000	-	-	9,000	0%	750
TRANSLATION SERVICES	1,200	-	-	1,200	0%	100
STAFF CONFERENCE & TRAINING	33,295	527	527	32,768	2%	2,247
PRACTICE MONITOR EXPENSE	1,000	-	-	1,000	0%	83
<b>TOTAL DIRECT EXPENSES:</b>	<b>206,999</b>	<b>3,145</b>	<b>3,145</b>	<b>203,854</b>	<b>2%</b>	<b>14,104</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (37.80 FTE)	3,764,781	280,733	280,733	3,484,048	7%	32,999
BENEFITS EXPENSE	1,073,208	81,827	81,827	991,381	8%	7,607
OTHER INDIRECT EXPENSE	1,169,740	109,198	109,198	1,060,542	9%	(11,720)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>6,007,729</b>	<b>471,759</b>	<b>471,759</b>	<b>5,535,970</b>	<b>8%</b>	<b>28,885</b>
<b>TOTAL ALL EXPENSES:</b>	<b>6,214,728</b>	<b>474,904</b>	<b>474,904</b>	<b>5,739,824</b>	<b>8%</b>	<b>42,990</b>
<b>NET INCOME (LOSS):</b>	<b>(6,095,728)</b>	<b>(466,024)</b>	<b>(466,024)</b>	<b>(5,629,704)</b>	<b>8%</b>	<b>41,954</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>DIVERSITY</b>						
<b>REVENUE:</b>						
DONATIONS	135,000	-	-	135,000	0%	(11,250)
<b>TOTAL REVENUE:</b>	<b>135,000</b>	<b>-</b>	<b>-</b>	<b>135,000</b>	<b>0%</b>	<b>(11,250)</b>
<b>DIRECT EXPENSES:</b>						
STAFF TRAVEL/PARKING	2,000	-	-	2,000	0%	167
STAFF MEMBERSHIP DUES	360	90	90	270	25%	(60)
COMMITTEE FOR DIVERSITY	3,800	-	-	3,800	0%	317
DIVERSITY EVENTS & PROJECTS	39,250	80	80	39,170	0%	3,191
SURVEYS	16,500	-	-	16,500	0%	1,375
STAFF CONFERENCE & TRAINING	5,000	100	100	4,900	2%	317
CONSULTING SERVICES	54,625	-	-	54,625	0%	4,552
<b>TOTAL DIRECT EXPENSE:</b>	<b>121,535</b>	<b>270</b>	<b>270</b>	<b>121,265</b>	<b>0%</b>	<b>9,858</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (2.69 FTE)	222,707	5,365	5,365	217,342	2%	13,194
BENEFITS EXPENSE	67,741	5,043	5,043	62,698	7%	602
OTHER INDIRECT EXPENSE	83,243	7,785	7,785	75,458	9%	(848)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>373,692</b>	<b>18,194</b>	<b>18,194</b>	<b>355,498</b>	<b>5%</b>	<b>12,947</b>
<b>TOTAL ALL EXPENSES:</b>	<b>495,227</b>	<b>18,464</b>	<b>18,464</b>	<b>476,763</b>	<b>4%</b>	<b>22,805</b>
<b>NET INCOME (LOSS):</b>	<b>(360,227)</b>	<b>(18,464)</b>	<b>(18,464)</b>	<b>(341,763)</b>	<b>5%</b>	<b>11,555</b>



**Washington State Bar Association**  
Statement of Activities  
For the Period from October 1, 2022 to October 31, 2022  
**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>FINANCE</b>						
(Previously ADMINISTRATION cost center)						
<b>REVENUE:</b>						
INTEREST INCOME	26,000	32,931	32,931	(6,931)	127%	30,765
<b>TOTAL REVENUE:</b>	<b>26,000</b>	<b>32,931</b>	<b>32,931</b>	<b>(6,931)</b>	<b>127%</b>	<b>30,765</b>
<b>DIRECT EXPENSES:</b>						
CONSULTING SERVICES	10,000	-	-	10,000	0%	833
STAFF TRAVEL/PARKING	3,000	-	-	3,000	0%	250
STAFF CONFERENCE & TRAINING	500	-	-	500	0%	42
MISCELLANEOUS	-	360	360	(360)		(360)
<b>TOTAL DIRECT EXPENSES:</b>	<b>13,500</b>	<b>360</b>	<b>360</b>	<b>13,140</b>	<b>3%</b>	<b>765</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (6.92 FTE)	661,642	43,014	43,014	618,628	7%	12,123
BENEFITS EXPENSE	205,235	15,517	15,517	189,718	8%	1,586
OTHER INDIRECT EXPENSE	213,844	20,054	20,054	193,789	9%	(2,234)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>1,080,720</b>	<b>78,585</b>	<b>78,585</b>	<b>1,002,135</b>	<b>7%</b>	<b>11,475</b>
<b>TOTAL ALL EXPENSES:</b>	<b>1,094,220</b>	<b>78,945</b>	<b>78,945</b>	<b>1,015,275</b>	<b>7%</b>	<b>12,240</b>
<b>NET INCOME (LOSS):</b>	<b>(1,068,220)</b>	<b>(46,014)</b>	<b>(46,014)</b>	<b>(1,022,207)</b>	<b>4%</b>	<b>43,004</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>FOUNDATION</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
CONSULTING SERVICES	3,000	-	-	3,000	0%	250
PRINTING & COPYING	450	-	-	450	0%	38
STAFF TRAVEL/PARKING	700	-	-	700	0%	58
SUPPLIES	150	24	24	126	16%	(12)
BOARD OF TRUSTEES	750	-	-	750	0%	63
POSTAGE	300	-	-	300	0%	25
STAFF CONFERENCE & TRAINING	300	-	-	300	0%	25
<b>TOTAL DIRECT EXPENSES:</b>	<b>5,650</b>	<b>24</b>	<b>24</b>	<b>5,626</b>	<b>0%</b>	<b>447</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.05 FTE)	96,359	7,846	7,846	88,513	8%	184
BENEFITS EXPENSE	18,295	1,308	1,308	16,987	7%	217
OTHER INDIRECT EXPENSE	32,493	3,016	3,016	29,477	9%	(309)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>147,147</b>	<b>12,170</b>	<b>12,170</b>	<b>134,977</b>	<b>8%</b>	<b>92</b>
<b>TOTAL ALL EXPENSES:</b>	<b>152,797</b>	<b>12,194</b>	<b>12,194</b>	<b>140,603</b>	<b>8%</b>	<b>539</b>
<b>NET INCOME (LOSS):</b>	<b>(152,797)</b>	<b>(12,194)</b>	<b>(12,194)</b>	<b>(140,603)</b>	<b>8%</b>	<b>539</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>HUMAN RESOURCES</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
STAFF TRAVEL/PARKING	700	-	-	700	0%	58
STAFF MEMBERSHIP DUES	800	-	-	800	0%	67
SUBSCRIPTIONS	500	229	229.00	271	46%	(187)
STAFF TRAINING- GENERAL	15,000	-	-	15,000	0%	1,250
RECRUITING AND ADVERTISING	6,600	511	511	6,089	8%	39
PAYROLL PROCESSING	50,000	3,570	3,570	46,430	7%	596
SALARY SURVEYS	1,500	-	-	1,500	0%	125
CONSULTING SERVICES	2,000	-	-	2,000	0%	167
TRANSFER TO INDIRECT EXPENSE	(77,100)	(4,311)	(4,311)	(72,789)	6%	(2,114)
<b>TOTAL DIRECT EXPENSES:</b>	-	-	-	-		-
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (3.00 FTE)	302,788	32,397	32,397	270,390	11%	(7,165)
ALLOWANCE FOR OPEN POSITIONS	(200,000)	-	-	(200,000)	0%	(16,667)
BENEFITS EXPENSE	96,043	7,238	7,238	88,805	8%	765
OTHER INDIRECT EXPENSE	92,837	8,682	8,682	84,154	9%	(946)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>291,667</b>	<b>48,317</b>	<b>48,317</b>	<b>243,349</b>	<b>17%</b>	<b>(24,012)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>291,667</b>	<b>48,317</b>	<b>48,317</b>	<b>243,349</b>	<b>17%</b>	<b>(24,012)</b>
<b>NET INCOME (LOSS):</b>	<b>(291,667)</b>	<b>(48,317)</b>	<b>(48,317)</b>	<b>(243,349)</b>	<b>17%</b>	<b>(24,012)</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>LEGISLATIVE</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
STAFF TRAVEL/PARKING	3,133	-	-	3,133	0%	261
STAFF MEMBERSHIP DUES	450	-	-	450	0%	38
JUD RECOMMEND COMMITTEE	2,250	-	-	2,250	0%	188
SUBSCRIPTIONS	2,000	-	-	2,000	0%	167
TELEPHONE	-	47	47	(47)		(47)
CONTRACT LOBBYIST	15,000	-	-	15,000	0%	1,250
LEGISLATIVE COMMITTEE	1,250	-	-	1,250	0%	104
BOG LEGISLATIVE COMMITTEE	300	-	-	300	0%	25
STAFF CONFERENCE & TRAINING	2,400	751	751	1,649	31%	(551)
<b>TOTAL DIRECT EXPENSES:</b>	<b>26,783</b>	<b>798</b>	<b>798</b>	<b>25,985</b>	<b>3%</b>	<b>1,434</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.70 FTE)	147,316	7,461	7,461	139,855	5%	4,816
BENEFITS EXPENSE	42,758	3,167	3,167	39,591	7%	396
OTHER INDIRECT EXPENSE	52,607	4,891	4,891	47,716	9%	(507)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>242,681</b>	<b>15,519</b>	<b>15,519</b>	<b>227,162</b>	<b>6%</b>	<b>4,705</b>
<b>TOTAL ALL EXPENSES:</b>	<b>269,464</b>	<b>16,317</b>	<b>16,317</b>	<b>253,147</b>	<b>6%</b>	<b>6,138</b>
<b>NET INCOME (LOSS):</b>	<b>(269,464)</b>	<b>(16,317)</b>	<b>(16,317)</b>	<b>(253,147)</b>	<b>6%</b>	<b>6,138</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>LICENSING &amp; MEMBERSHIP RECORDS</b>						
<b>REVENUE:</b>						
STATUS CERTIFICATE FEES	27,000	2,325	2,325	24,675	9%	75
INVESTIGATION FEES	21,000	2,000	2,000	19,000	10%	250
PRO HAC VICE	400,000	21,984	21,984	378,016	5%	(11,349)
MEMBER CONTACT INFORMATION	4,000	325	325	3,675	8%	(8)
PHOTO BAR CARD SALES	200	36	36	164	18%	19
<b>TOTAL REVENUE:</b>	<b>452,200</b>	<b>26,670</b>	<b>26,670</b>	<b>425,530</b>	<b>6%</b>	<b>(11,013)</b>
<b>DIRECT EXPENSES:</b>						
DEPRECIATION	1,151	-	-	1,151	0%	96
POSTAGE	16,500	99	99	16,401	1%	1,276
LICENSING FORMS	2,000	-	-	2,000	0%	167
<b>TOTAL DIRECT EXPENSES:</b>	<b>19,651</b>	<b>99</b>	<b>99</b>	<b>19,552</b>	<b>1%</b>	<b>1,538</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (3.83 FTE)	379,520	31,387	31,387	348,133	8%	240
BENEFITS EXPENSE	124,269	9,377	9,377	114,893	8%	979
OTHER INDIRECT EXPENSE	118,521	11,046	11,046	107,475	9%	(1,169)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>622,311</b>	<b>51,810</b>	<b>51,810</b>	<b>570,501</b>	<b>8%</b>	<b>50</b>
<b>TOTAL ALL EXPENSES:</b>	<b>641,962</b>	<b>51,909</b>	<b>51,909</b>	<b>590,053</b>	<b>8%</b>	<b>1,588</b>
<b>NET INCOME (LOSS):</b>	<b>(189,762)</b>	<b>(25,239)</b>	<b>(25,239)</b>	<b>(164,523)</b>	<b>13%</b>	<b>(9,425)</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>LEGAL LUNCHBOX</b>						
<b>REVENUE:</b>						
SPONSORSHIPS	9,000	-	-	9,000	0%	(750)
DIGITAL VIDEO SALES	14,000	2,352	2,352	11,648	17%	1,185
<b>TOTAL REVENUE:</b>	<b>23,000</b>	<b>2,352</b>	<b>2,352</b>	<b>20,648</b>	<b>10%</b>	<b>435</b>
<b>DIRECT EXPENSES:</b>						
SPEAKERS & DEVELOPMENT	1,500	-	-	1,500	0%	125
<b>TOTAL DIRECT EXPENSES:</b>	<b>1,500</b>	<b>-</b>	<b>-</b>	<b>1,500</b>	<b>0%</b>	<b>125</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (0.43 FTE)	27,897	2,193	2,193	25,704	8%	132
BENEFITS EXPENSE	10,037	674	674	9,363	7%	163
OTHER INDIRECT EXPENSE	13,183	1,223	1,223	11,960	9%	(124)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>51,117</b>	<b>4,089</b>	<b>4,089</b>	<b>47,027</b>	<b>8%</b>	<b>170</b>
<b>TOTAL ALL EXPENSES:</b>	<b>52,617</b>	<b>4,089</b>	<b>4,089</b>	<b>48,527</b>	<b>8%</b>	<b>295</b>
<b>NET INCOME (LOSS):</b>	<b>(29,617)</b>	<b>(1,737)</b>	<b>(1,737)</b>	<b>(27,879)</b>	<b>6%</b>	<b>731</b>

**Washington State Bar Association**

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	<b>FISCAL 2023 BUDGET</b>	<b>CURRENT MONTH</b>	<b>YEAR TO DATE</b>	<b>REMAINING BALANCE</b>	<b>% USED OF BUDGET</b>	<b>YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)</b>
<b>LIMITED LICENSE LEGAL TECHNICIAN PROGRAM</b>						
<b>REVENUE:</b>						
SEMINAR REGISTRATIONS	12,000	-	-	12,000	0%	(1,000)
LLLT LICENSE FEES	16,622	1,067	1,067	15,555	6%	(318)
LLLT LATE LICENSE FEES	1,100	-	-	1,100	0%	(92)
INVESTIGATION FEES	-	100	100	(100)		100
<b>TOTAL REVENUE:</b>	<b>29,722</b>	<b>1,167</b>	<b>1,167</b>	<b>28,555</b>	<b>4%</b>	<b>(1,310)</b>
<b>DIRECT EXPENSES:</b>						
LLLT BOARD	15,000	866	866	14,134	6%	384
LLLT EDUCATION	500	-	-	500	0%	42
<b>TOTAL DIRECT EXPENSES:</b>	<b>15,500</b>	<b>866</b>	<b>866</b>	<b>14,634</b>	<b>6%</b>	<b>426</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (0.53 FTE)	51,548	3,998	3,998	47,550	8%	298
BENEFITS EXPENSE	17,299	1,240	1,240	16,059	7%	201
OTHER INDIRECT EXPENSE	16,401	1,549	1,549	14,852	9%	(182)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>85,248</b>	<b>6,787</b>	<b>6,787</b>	<b>78,461</b>	<b>8%</b>	<b>317</b>
<b>TOTAL ALL EXPENSES:</b>	<b>100,748</b>	<b>7,653</b>	<b>7,653</b>	<b>93,096</b>	<b>8%</b>	<b>743</b>
<b>NET INCOME (LOSS):</b>	<b>(71,026)</b>	<b>(6,485)</b>	<b>(6,485)</b>	<b>93,096</b>	<b>9%</b>	<b>(567)</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>LIMITED PRACTICE OFFICERS</b>						
<b>REVENUE:</b>						
INVESTIGATION FEES	500	-	-	500	0%	(42)
LPO EXAMINATION FEES	28,300	9,300	9,300	19,000	33%	6,942
LPO LICENSE FEES	164,750	13,893	13,893	150,857	8%	164
LPO LATE LICENSE FEES	988	-	-	988	0%	(82)
LPO LICENSE FEES - REINSTATES	550	-	-	550	0%	(46)
<b>TOTAL REVENUE:</b>	<b>195,088</b>	<b>23,193</b>	<b>23,193</b>	<b>171,895</b>	<b>12%</b>	<b>6,936</b>
<b>DIRECT EXPENSES:</b>						
FACILITY, PARKING, FOOD	9,000	-	-	9,000	0%	750
EXAM WRITING	9,000	-	-	9,000	0%	750
LPO BOARD	1,792	-	-	1,792	0%	149
LPO OUTREACH	1,000	-	-	1,000	0%	83
PRINTING & COPYING	250	-	-	250	0%	21
<b>TOTAL DIRECT EXPENSES:</b>	<b>21,042</b>	<b>-</b>	<b>-</b>	<b>21,042</b>	<b>0%</b>	<b>1,754</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (0.68 FTE)	57,874	4,492	4,492	53,383	8%	331
BENEFITS EXPENSE	20,388	1,463	1,463	18,925	7%	236
OTHER INDIRECT EXPENSE	21,043	1,957	1,957	19,086	9%	(203)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>99,305</b>	<b>7,911</b>	<b>7,911</b>	<b>91,394</b>	<b>8%</b>	<b>364</b>
<b>TOTAL ALL EXPENSES:</b>	<b>120,347</b>	<b>7,911</b>	<b>7,911</b>	<b>112,436</b>	<b>7%</b>	<b>2,118</b>
<b>NET INCOME (LOSS):</b>	<b>74,741</b>	<b>15,282</b>	<b>15,282</b>	<b>59,458</b>	<b>20%</b>	<b>9,054</b>



## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>MANDATORY CONTINUING LEGAL EDUCATION</b>						
<b>REVENUE:</b>						
ACCREDITED PROGRAM FEES	550,000	56,700	56,700	493,300	10%	10,867
FORM 1 LATE FEES	220,000	22,000	22,000	198,000	10%	3,667
MEMBER LATE FEES	190,000	900	900	189,100	0%	(14,933)
ANNUAL ACCREDITED SPONSOR FEES	38,250	-	-	38,250	0%	(3,188)
ATTENDANCE LATE FEES	98,000	7,000	7,000	91,000	7%	(1,167)
COMITY CERTIFICATES	29,000	475	475	28,525	2%	(1,942)
<b>TOTAL REVENUE:</b>	<b>1,125,250</b>	<b>87,075</b>	<b>87,075</b>	<b>1,038,175</b>	<b>8%</b>	<b>(6,696)</b>
<b>DIRECT EXPENSES:</b>						
DEPRECIATION	59,565	1,679	1,679	57,886	3%	3,285
STAFF MEMBERSHIP DUES	500	-	-	500	0%	42
MCLE BOARD	2,000	-	-	2,000	0%	167
STAFF TRAVEL/PARKING	50	-	-	50	0%	4
STAFF CONFERENCE & TRAINING	4,900	-	-	4,900	0%	408
<b>TOTAL DIRECT EXPENSES:</b>	<b>67,015</b>	<b>1,679</b>	<b>1,679</b>	<b>65,336</b>	<b>3%</b>	<b>3,905</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (4.88 FTE)	437,860	41,640	41,640	396,220	10%	(5,151)
BENEFITS EXPENSE	125,455	9,348	9,348	116,108	7%	1,107
OTHER INDIRECT EXPENSE	151,014	14,103	14,103	136,911	9%	(1,519)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>714,329</b>	<b>65,091</b>	<b>65,091</b>	<b>649,238</b>	<b>9%</b>	<b>(5,563)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>781,344</b>	<b>66,770</b>	<b>66,770</b>	<b>714,574</b>	<b>9%</b>	<b>(1,658)</b>
<b>NET INCOME (LOSS):</b>	<b>343,906</b>	<b>20,305</b>	<b>20,305</b>	<b>323,601</b>	<b>6%</b>	<b>(8,354)</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>MINI CLE</b>						
INDIRECT EXPENSES:	64,627	5,283	5,283	59,345	8%	5,366
SALARY EXPENSE (0.92 FTE)	21,315	1,522	1,522	19,793	7%	254
BENEFITS EXPENSE	28,470	2,649	2,649	25,820	9%	(277)
OTHER INDIRECT EXPENSE						
<b>TOTAL INDIRECT EXPENSES:</b>	<b>114,412</b>	<b>9,454</b>	<b>9,454</b>	<b>104,958</b>	<b>8%</b>	<b>5,343</b>
<b>NET INCOME (LOSS):</b>	<b>(114,412)</b>	<b>(9,454)</b>	<b>(9,454)</b>	<b>(104,958)</b>	<b>8%</b>	<b>80</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>MEMBER SERVICES &amp; ENGAGEMENT</b>						
<b>REVENUE:</b>						
ROYALTIES	10,800	35	35	10,765	0%	(865)
SPONSORSHIPS	1,000	-	-	1,000	0%	(83)
<b>TOTAL REVENUE:</b>	<b>11,800</b>	<b>35</b>	<b>35</b>	<b>11,765</b>	<b>0%</b>	<b>(949)</b>
<b>DIRECT EXPENSES:</b>						
STAFF TRAVEL/PARKING	1,700	-	-	1,700	0%	142
STAFF CONFERENCE & TRAINING	250	-	-	250	0%	21
SMALL TOWN AND RURAL COMMITTEE	3,000	-	-	3,000	0%	250
PRINTING & COPYING	1,200	1,300	1,300	(100)	108%	(1,200)
NEW LAWYER OUTREACH	1,000	-	-	1,000	0%	83
YLL SECTION PROGRAM	1,500	-	-	1,500	0%	125
WYLC CLE COMPS	1,000	-	-	1,000	0%	83
WYLC OUTREACH EVENTS	1,500	-	-	1,500	0%	125
WYL COMMITTEE	12,000	-	-	12,000	0%	1,000
OPEN SECTIONS NIGHT	3,500	-	-	3,500	0%	292
RECEPTION/FORUM EXPENSE	3,000	-	-	3,000	0%	250
WYLC SCHOLARSHIPS/DONATIONS/GRANT	5,000	-	-	5,000	0%	417
STAFF MEMBERSHIP DUES	850	150	150	700	18%	(79)
LENDING LIBRARY	4,000	10	10	3,990	0%	323
<b>TOTAL DIRECT EXPENSES:</b>	<b>39,500</b>	<b>1,460</b>	<b>1,460</b>	<b>38,040</b>	<b>4%</b>	<b>1,832</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (2.51 FTE)	165,522	13,066	13,066	152,455	8%	727
BENEFITS EXPENSE	59,907	4,413	4,413	55,494	7%	579
OTHER INDIRECT EXPENSE	77,549	7,255	7,255	70,294	9%	(793)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>302,978</b>	<b>24,735</b>	<b>24,735</b>	<b>278,243</b>	<b>8%</b>	<b>513</b>
<b>TOTAL ALL EXPENSES:</b>	<b>342,478</b>	<b>26,195</b>	<b>26,195</b>	<b>316,283</b>	<b>8%</b>	<b>2,345</b>
<b>NET INCOME (LOSS):</b>	<b>(330,678)</b>	<b>(26,160)</b>	<b>(26,160)</b>	<b>(304,518)</b>	<b>8%</b>	<b>1,396</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>MEMBER SERVICES &amp; ENGAGEMENT (COMBINED)</b>						
<b>REVENUE:</b>						
ROYALTIES	10,800	35	35	10,765	0%	(865)
NMP PRODUCT SALES	65,000	553	553	64,447	1%	(4,864)
DIGITAL VIDEO SALES	14,000	2,352	2,352	11,648	17%	1,185
SPONSORSHIPS	10,000	-	-	10,000	0%	(833)
SEMINAR REGISTRATIONS	8,000	10,886	10,886	(2,886)	136%	10,219
TRIAL ADVOCACY PROGRAM	12,000	-	-	12,000	0%	(1,000)
<b>TOTAL REVENUE:</b>	<b>119,800</b>	<b>13,826</b>	<b>13,826</b>	<b>105,974</b>	<b>12%</b>	<b>3,842</b>
<b>DIRECT EXPENSES:</b>						
STAFF TRAVEL/PARKING	1,700	-	-	1,700	0%	142
STAFF CONFERENCE & TRAINING	250	-	-	250	0%	21
SMALL TOWN AND RURAL COMMITTEE	3,000	-	-	3,000	0%	250
PRINTING & COPYING	1,200	1,300	1,300	(100)	108%	(1,200)
NEW LAWYER OUTREACH	1,000	-	-	1,000	0%	83
YLL SECTION PROGRAM	1,500	-	-	1,500	0%	125
WYLC CLE COMPS	1,000	-	-	1,000	0%	83
WYLC OUTREACH EVENTS	1,500	-	-	1,500	0%	125
SPEAKERS & PROGRAM DEVELOP	1,500	-	-	1,500	0%	125
WYL COMMITTEE	12,000	-	-	12,000	0%	1,000
OPEN SECTIONS NIGHT	3,500	-	-	3,500	0%	292
TRIAL ADVOCACY EXPENSES	1,500	-	-	1,500	0%	125
RECEPTION/FORUM EXPENSE	3,000	-	-	3,000	0%	250
WYLC SCHOLARSHIPS/DONATIONS/GRANT	5,000	-	-	5,000	0%	417
STAFF MEMBERSHIP DUES	850	150	150	700	18%	(79)
LENDING LIBRARY	4,000	10	10	3,990	0%	323
NMP SPEAKERS & PROGRAM DEVELOPMENT	100	-	-	100	0%	8
<b>TOTAL DIRECT EXPENSES:</b>	<b>42,600</b>	<b>1,460</b>	<b>1,460</b>	<b>41,140</b>	<b>3%</b>	<b>2,090</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (4.64 FTE)	311,600	24,921	24,921	286,679	8%	1,045
BENEFITS EXPENSE	108,835	7,838	7,838	100,997	7%	1,232
OTHER INDIRECT EXPENSE	143,340	13,370	13,370	129,970	9%	(1,425)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>563,775</b>	<b>46,129</b>	<b>46,129</b>	<b>517,646</b>	<b>8%</b>	<b>852</b>
<b>TOTAL ALL EXPENSES:</b>	<b>606,375</b>	<b>47,589</b>	<b>47,589</b>	<b>558,786</b>	<b>8%</b>	<b>2,942</b>
<b>NET INCOME (LOSS):</b>	<b>(486,575)</b>	<b>(33,763)</b>	<b>(33,763)</b>	<b>(452,812)</b>	<b>7%</b>	<b>6,785</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>MEMBER WELLNESS PROGRAM</b>						
<b>REVENUE:</b>						
DIVERSIONS	7,500	-	-	7,500	0%	(625)
<b>TOTAL REVENUE:</b>	<b>7,500</b>	<b>-</b>	<b>-</b>	<b>7,500</b>	<b>0%</b>	<b>(625)</b>
<b>DIRECT EXPENSES:</b>						
STAFF MEMBERSHIP DUES	500	-	-	500	0%	42
MEMBER WELLNESS COUNCIL	800	-	-	800	0%	67
STAFF CONFERENCE & TRAINING	300	-	-	300	0%	25
SUBSCRIPTIONS	1,200	100	100	1,100	8%	-
<b>TOTAL DIRECT EXPENSES:</b>	<b>2,800</b>	<b>100</b>	<b>100</b>	<b>2,700</b>	<b>4%</b>	<b>133</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.48 FTE)	133,673	5,858	5,858	127,815	4%	5,282
BENEFITS EXPENSE	55,402	4,116	4,116	51,286	7%	501
OTHER INDIRECT EXPENSE	45,645	4,280	4,280	41,365	9%	(476)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>234,719</b>	<b>14,253</b>	<b>14,253</b>	<b>220,466</b>	<b>6%</b>	<b>5,307</b>
<b>TOTAL ALL EXPENSES:</b>	<b>237,519</b>	<b>14,353</b>	<b>14,353</b>	<b>223,166</b>	<b>6%</b>	<b>5,440</b>
<b>NET INCOME (LOSS):</b>	<b>(230,019)</b>	<b>(14,353)</b>	<b>(14,353)</b>	<b>(215,666)</b>	<b>6%</b>	<b>4,815</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>NEW MEMBER EDUCATION</b>						
<b>REVENUE:</b>						
NMP PRODUCT SALES	65,000	553	553	64,447	1%	(4,864)
SEMINAR REGISTRATIONS	8,000	10,886	10,886	(2,886)	136%	10,219
TRIAL ADVOCACY PROGRAM	12,000	-	-	12,000	0%	(1,000)
<b>TOTAL REVENUE:</b>	<b>85,000</b>	<b>11,439</b>	<b>11,439</b>	<b>73,561</b>	<b>13%</b>	<b>4,356</b>
<b>DIRECT EXPENSES:</b>						
TRIAL ADVOCACY EXPENSES	1,500	-	-	1,500	0%	125
SPEAKERS & PROGRAM DEVELOPMENT	100	-	-	100	0%	8
<b>TOTAL DIRECT EXPENSES:</b>	<b>1,600</b>	<b>-</b>	<b>-</b>	<b>1,600</b>	<b>0%</b>	<b>133</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (0.78 FTE)	53,555	4,380	4,380	49,175	8%	83
BENEFITS EXPENSE	17,577	1,229	1,229	16,348	7%	236
OTHER INDIRECT EXPENSE	24,137	2,242	2,242	21,896	9%	(230)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>95,269</b>	<b>7,850</b>	<b>7,850</b>	<b>87,418</b>	<b>8%</b>	<b>89</b>
<b>TOTAL ALL EXPENSES:</b>	<b>96,869</b>	<b>7,850</b>	<b>7,850</b>	<b>89,018</b>	<b>8%</b>	<b>222</b>
<b>NET INCOME (LOSS):</b>	<b>(11,869)</b>	<b>3,589</b>	<b>3,589</b>	<b>(15,457)</b>	<b>-30%</b>	<b>4,578</b>

**Washington State Bar Association**  
Statement of Activities  
For the Period from October 1, 2022 to October 31, 2022  
**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>OFFICE OF THE EXECUTIVE DIRECTOR</b>						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
LEADERSHIP TRAINING	20,000	-	-	20,000	0%	1,667
WASHINGTON LEADERSHIP INSTITUTE	80,000	-	-	80,000	0%	6,667
ED TRAVEL & OUTREACH	5,000	291	291	4,709	6%	126
BAR LEADERS CONFERENCE	12,000	7,801	7,801	4,199	65%	(6,801)
STAFF TRAVEL/PARKING	1,500	99	99	1,401	7%	26
STAFF CONFERENCE & TRAINING	8,925	-	-	8,925	0%	744
STAFF MEMBERSHIP DUES	1,000	335	335	665	34%	(252)
SURVEY	350	-	-	350	0%	29
<b>TOTAL DIRECT EXPENSES:</b>	<b>128,775</b>	<b>8,526</b>	<b>8,526</b>	<b>120,249</b>	<b>7%</b>	<b>2,205</b>
INDIRECT EXPENSES:						
SALARY EXPENSE (2.00 FTE)	402,379	19,553	19,553	382,826	5%	13,978
BENEFITS EXPENSE	103,989	7,982	7,982	96,007	8%	684
OTHER INDIRECT EXPENSE	61,891	5,788	5,788	56,103	9%	(630)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>568,259</b>	<b>33,324</b>	<b>33,324</b>	<b>534,935</b>	<b>6%</b>	<b>14,031</b>
<b>TOTAL ALL EXPENSES:</b>	<b>697,034</b>	<b>41,850</b>	<b>41,850</b>	<b>655,184</b>	<b>6%</b>	<b>16,236</b>
<b>NET INCOME (LOSS):</b>	<b>(697,034)</b>	<b>(41,850)</b>	<b>(41,850)</b>	<b>655,184</b>	<b>6%</b>	<b>16,236</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>OFFICE OF GENERAL COUNSEL</b>						
<b>REVENUE:</b>						
RECORDS REQUEST FEES	963	-	-	963	0%	(80)
<b>TOTAL REVENUE:</b>	<b>963</b>	<b>-</b>	<b>-</b>	<b>963</b>	<b>0%</b>	<b>(80)</b>
<b>DIRECT EXPENSES:</b>						
STAFF TRAVEL/PARKING	500	-	-	500	0%	42
STAFF MEMBERSHIP DUES	1,150	1,175	1,175	(25)	102%	(1,079)
COURT RULES COMMITTEE	1,000	-	-	1,000	0%	83
CUSTODIANSHIPS	8,150	-	-	8,150	0%	679
WILLS	2,000	-	-	2,000	0%	167
LITIGATION EXPENSES	200	-	-	200	0%	17
STAFF CONFERENCE & TRAINING	6,400	-	-	6,400	0%	533
MISCELLANEOUS	-	3	3	(3)		(3)
<b>TOTAL DIRECT EXPENSES:</b>	<b>19,400</b>	<b>1,178</b>	<b>1,178</b>	<b>18,222</b>	<b>6%</b>	<b>439</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (6.17 FTE)	656,837	46,243	46,243	610,593	7%	8,493
BENEFITS EXPENSE	188,816	14,362	14,362	174,454	8%	1,373
OTHER INDIRECT EXPENSE	192,481	17,935	17,935	174,546	9%	(1,895)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>1,038,134</b>	<b>78,540</b>	<b>78,540</b>	<b>959,594</b>	<b>8%</b>	<b>7,971</b>
<b>TOTAL ALL EXPENSES:</b>	<b>1,057,534</b>	<b>79,718</b>	<b>79,718</b>	<b>977,816</b>	<b>8%</b>	<b>8,410</b>
<b>NET INCOME (LOSS):</b>	<b>(1,056,571)</b>	<b>(79,718)</b>	<b>(79,718)</b>	<b>(976,853)</b>	<b>8%</b>	<b>8,329</b>



**Washington State Bar Association**  
Statement of Activities  
For the Period from October 1, 2022 to October 31, 2022  
**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>OFFICE OF GENERAL COUNSEL - DISCIPLINARY BOARD</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSE:</b>						
STAFF MEMBERSHIP DUES	100	250	250	(150)	250%	(242)
DISCIPLINARY BOARD EXPENSES	4,000	-	-	4,000	0%	333
CHIEF HEARING OFFICER	30,000	2,500	2,500	27,500	8%	-
HEARING OFFICER EXPENSES	17,500	-	-	17,500	0%	1,458
HEARING OFFICER TRAINING	400	-	-	400	0%	33
OUTSIDE COUNSEL	60,000	4,000	4,000	56,000	7%	1,000
<b>TOTAL DIRECT EXPENSES:</b>	<b>112,000</b>	<b>6,750</b>	<b>6,750</b>	<b>105,250</b>	<b>6%</b>	<b>2,583</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.40 FTE)	133,790	11,030	11,030	122,760	8%	119
BENEFITS EXPENSE	40,026	2,966	2,966	37,060	7%	370
OTHER INDIRECT EXPENSE	43,324	4,035	4,035	39,288	9%	(425)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>217,139</b>	<b>18,031</b>	<b>18,031</b>	<b>199,109</b>	<b>8%</b>	<b>64</b>
<b>TOTAL ALL EXPENSES:</b>	<b>329,139</b>	<b>24,781</b>	<b>24,781</b>	<b>304,359</b>	<b>8%</b>	<b>2,648</b>
<b>NET INCOME (LOSS):</b>	<b>(329,139)</b>	<b>(24,781)</b>	<b>(24,781)</b>	<b>(304,359)</b>	<b>8%</b>	<b>2,648</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>PRACTICE OF LAW BOARD</b>						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
PRACTICE OF LAW BOARD	12,000	-	-	12,000	0%	1,000
TOTAL DIRECT EXPENSES:	<u>12,000</u>	<u>-</u>	<u>-</u>	<u>12,000</u>	<u>0%</u>	<u>1,000</u>
INDIRECT EXPENSES:						
SALARY EXPENSE (0.45 FTE)	35,965	2,966	2,966	32,999	8%	31
BENEFITS EXPENSE	13,465	936	936	12,529	7%	186
OTHER INDIRECT EXPENSE	13,925	1,345	1,345	12,580	10%	(185)
TOTAL INDIRECT EXPENSES:	<u>63,355</u>	<u>5,247</u>	<u>5,247</u>	<u>58,108</u>	<u>8%</u>	<u>32</u>
TOTAL ALL EXPENSES:	<u>75,355</u>	<u>5,247</u>	<u>5,247</u>	<u>70,108</u>	<u>7%</u>	<u>1,032</u>
NET INCOME (LOSS):	<u>(75,355)</u>	<u>(5,247)</u>	<u>(5,247)</u>	<u>(70,108)</u>	<u>7%</u>	<u>1,032</u>

**Washington State Bar Association**  
Statement of Activities  
For the Period from October 1, 2022 to October 31, 2022  
**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>PRACTICE MANAGEMENT ASSISTANCE</b>						
<b>REVENUE:</b>						
ROYALTIES	50,000	-	-	50,000	0%	(4,167)
<b>TOTAL REVENUE:</b>	<b>50,000</b>	<b>-</b>	<b>-</b>	<b>50,000</b>	<b>0%</b>	<b>(4,167)</b>
<b>DIRECT EXPENSE:</b>						
STAFF MEMBERSHIP DUES	150	-	-	150	0%	13
CASEMAKER/FASTCASE	73,000	-	-	73,000	0%	6,083
STAFF CONFERENCE & TRAINING	250	-	-	250	0%	21
<b>TOTAL DIRECT EXPENSES:</b>	<b>73,400</b>	<b>-</b>	<b>-</b>	<b>73,400</b>	<b>0%</b>	<b>6,117</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (0.95 FTE)	80,135	6,594	6,594	73,541	8%	84
BENEFITS EXPENSE	23,499	1,709	1,709	21,790	7%	249
OTHER INDIRECT EXPENSE	29,398	2,731	2,731	26,667	9%	(281)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>133,033</b>	<b>11,035</b>	<b>11,035</b>	<b>121,998</b>	<b>8%</b>	<b>51</b>
<b>TOTAL ALL EXPENSES:</b>	<b>206,433</b>	<b>11,035</b>	<b>11,035</b>	<b>195,398</b>	<b>5%</b>	<b>6,168</b>
<b>NET INCOME (LOSS):</b>	<b>(156,433)</b>	<b>(11,035)</b>	<b>(11,035)</b>	<b>(145,398)</b>	<b>7%</b>	<b>2,001</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>PROFESSIONAL RESPONSIBILITY PROGRAM</b>						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	750	-	-	750	0%	63
STAFF MEMBERSHIP DUES	500	-	-	500	0%	42
CPE COMMITTEE	1,000	267	267	733	27%	(184)
<b>TOTAL DIRECT EXPENSES:</b>	<b>2,250</b>	<b>267</b>	<b>267</b>	<b>1,983</b>	<b>12%</b>	<b>(80)</b>
INDIRECT EXPENSES:						
SALARY EXPENSE (1.10 FTE)	91,667	11,294	11,294	80,373	12%	(3,655)
BENEFITS EXPENSE	37,219	4,339	4,339	32,880	12%	(1,237)
OTHER INDIRECT EXPENSE	22,435	3,179	3,179	19,256	14%	(1,310)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>151,321</b>	<b>18,812</b>	<b>18,812</b>	<b>132,509</b>	<b>12%</b>	<b>(6,202)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>153,571</b>	<b>19,080</b>	<b>19,080</b>	<b>134,492</b>	<b>12%</b>	<b>(6,282)</b>
<b>NET INCOME (LOSS):</b>	<b>(153,571)</b>	<b>(19,080)</b>	<b>(19,080)</b>	<b>(134,492)</b>	<b>12%</b>	<b>(6,282)</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>PUBLIC SERVICE PROGRAMS</b>						
<b>REVENUE:</b>						
DONATIONS & GRANTS	130,000	-	-	130,000	0%	(10,833)
<b>TOTAL REVENUE:</b>	<b>130,000</b>	<b>-</b>	<b>-</b>	<b>130,000</b>	<b>0%</b>	<b>(10,833)</b>
<b>DIRECT EXPENSES:</b>						
DONATIONS/SPONSORSHIPS/GRANTS	260,828	-	-	260,828	0%	21,736
STAFF TRAVEL/PARKING	1,500	-	-	1,500	0%	125
SURVEYS	100	-	-	100	0%	8
PRO BONO & PUBLIC SERVICE COMMITTEE	1,500	-	-	1,500	0%	125
STAFF CONFERENCE & TRAINING	1,000	-	-	1,000	0%	83
PRO BONO CERTIFICATES	2,000	457	457	1,543	23%	(290)
<b>TOTAL DIRECT EXPENSES:</b>	<b>266,928</b>	<b>457</b>	<b>457</b>	<b>266,471</b>	<b>0%</b>	<b>21,787</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.62 FTE)	128,588	10,465	10,465	118,123	8%	251
BENEFITS EXPENSE	40,609	2,984	2,984	37,626	7%	401
OTHER INDIRECT EXPENSE	50,132	4,688	4,688	45,444	9%	(510)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>219,329</b>	<b>18,136</b>	<b>18,136</b>	<b>201,193</b>	<b>8%</b>	<b>141</b>
<b>TOTAL ALL EXPENSES:</b>	<b>486,257</b>	<b>18,593</b>	<b>18,593</b>	<b>467,664</b>	<b>4%</b>	<b>21,929</b>
<b>NET INCOME (LOSS):</b>	<b>(356,257)</b>	<b>(18,593)</b>	<b>(18,593)</b>	<b>(337,664)</b>	<b>5%</b>	<b>11,095</b>

**Washington State Bar Association**

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	<b>FISCAL 2023 BUDGET</b>	<b>CURRENT MONTH</b>	<b>YEAR TO DATE</b>	<b>REMAINING BALANCE</b>	<b>% USED OF BUDGET</b>	<b>YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)</b>
<b>PUBLICATION &amp; DESIGN SERVICES</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
STAFF CONFERENCE & TRAINING	350	-	-	350	0%	29
SUBSCRIPTIONS	162	-	-	162	0%	14
IMAGE LIBRARY	4,100	4,100	4,100	-	100%	(3,758)
<b>TOTAL DIRECT EXPENSES:</b>	<b>4,612</b>	<b>4,100</b>	<b>4,100</b>	<b>512</b>	<b>89%</b>	<b>(3,716)</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (0.89 FTE)	72,143	5,956	5,956	66,186	8%	55
BENEFITS EXPENSE	19,491	1,385	1,385	18,106	7%	239
OTHER INDIRECT EXPENSE	27,542	2,568	2,568	24,974	9%	(273)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>119,175</b>	<b>9,909</b>	<b>9,909</b>	<b>109,266</b>	<b>8%</b>	<b>22</b>
<b>TOTAL ALL EXPENSES:</b>	<b>123,787</b>	<b>14,009</b>	<b>14,009</b>	<b>109,778</b>	<b>11%</b>	<b>(3,694)</b>
<b>NET INCOME (LOSS):</b>	<b>(123,787)</b>	<b>(14,009)</b>	<b>(14,009)</b>	<b>(109,778)</b>	<b>11%</b>	<b>(3,694)</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>REGULATORY SERVICES FTE</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
STAFF CONFERENCE & TRAINING	23,550	-	-	23,550	0%	1,963
<b>TOTAL DIRECT EXPENSES:</b>	<b>23,550</b>	<b>-</b>	<b>-</b>	<b>23,550</b>	<b>0%</b>	<b>1,963</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (2.70 FTE)	349,467	22,516	22,516	326,951	6%	6,606
BENEFITS EXPENSE	103,888	7,900	7,900	95,988	8%	757
OTHER INDIRECT EXPENSE	83,553	7,785	7,785	75,768	9%	(823)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>536,908</b>	<b>38,201</b>	<b>38,201</b>	<b>498,706</b>	<b>7%</b>	<b>6,541</b>
<b>TOTAL ALL EXPENSES:</b>	<b>560,458</b>	<b>38,201</b>	<b>38,201</b>	<b>522,256</b>	<b>7%</b>	<b>8,503</b>
<b>NET INCOME (LOSS):</b>	<b>(560,458)</b>	<b>(38,201)</b>	<b>(38,201)</b>	<b>(522,256)</b>	<b>7%</b>	<b>8,503</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>SERVICE CENTER</b>						
<b>REVENUE:</b>						
	_____	_____	_____	_____	_____	_____
<b>TOTAL REVENUE:</b>	-	-	-	-	-	-
<b>DIRECT EXPENSES:</b>						
	_____	_____	_____	_____	_____	_____
TRANSLATION SERVICES	8,200	387	387	7,813	5%	296
STAFF CONFERENCE & TRAINING	2,100	-	-	2,100	0%	175
<b>TOTAL DIRECT EXPENSES:</b>	<b>10,300</b>	<b>387</b>	<b>387</b>	<b>9,913</b>	<b>4%</b>	<b>471</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (5.71 FTE)	383,690	31,695	31,695	351,995	8%	280
BENEFITS EXPENSE	142,992	10,665	10,665	132,327	7%	1,251
OTHER INDIRECT EXPENSE	176,699	16,508	16,508	160,191	9%	(1,783)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>703,381</b>	<b>58,868</b>	<b>58,868</b>	<b>644,513</b>	<b>8%</b>	<b>(253)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>713,681</b>	<b>59,255</b>	<b>59,255</b>	<b>654,426</b>	<b>8%</b>	<b>219</b>
<b>NET INCOME (LOSS):</b>	<b>(713,681)</b>	<b>(59,255)</b>	<b>(59,255)</b>	<b>(654,426)</b>	<b>8%</b>	<b>219</b>



**Washington State Bar Association**  
Statement of Activities  
For the Period from October 1, 2022 to October 31, 2022  
**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>SECTIONS ADMINISTRATION</b>						
<b>REVENUE:</b>						
REIMBURSEMENTS FROM SECTIONS	290,543	92,166	92,166	198,377	32%	67,954
<b>TOTAL REVENUE:</b>	<b>290,543</b>	<b>92,166</b>	<b>92,166</b>	<b>198,377</b>	<b>32%</b>	<b>67,954</b>
<b>DIRECT EXPENSES:</b>						
STAFF TRAVEL/PARKING	750	-	-	750	0%	63
SUBSCRIPTIONS	350	-	-	350	0%	29
SECTION/COMMITTEE CHAIR MTGS	1,000	-	-	1,000	0%	83
DUES STATEMENTS	5,000	-	-	5,000	0%	417
STAFF CONFERENCE & TRAINING	500	-	-	500	0%	42
STAFF MEMBERSHIP DUES	250	-	-	250	0%	21
<b>TOTAL DIRECT EXPENSES:</b>	<b>7,850</b>	<b>-</b>	<b>-</b>	<b>7,850</b>	<b>0%</b>	<b>654</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (2.58 FTE)	149,581	12,121	12,121	137,460	8%	344
BENEFITS EXPENSE	61,326	4,500	4,500	56,826	7%	611
OTHER INDIRECT EXPENSE	79,839	7,459	7,459	72,380	9%	(806)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>290,746</b>	<b>24,080</b>	<b>24,080</b>	<b>266,666</b>	<b>8%</b>	<b>149</b>
<b>TOTAL ALL EXPENSES:</b>	<b>298,596</b>	<b>24,080</b>	<b>24,080</b>	<b>274,516</b>	<b>8%</b>	<b>803</b>
<b>NET INCOME (LOSS):</b>	<b>(8,053)</b>	<b>68,086</b>	<b>68,086</b>	<b>(76,140)</b>	<b>-845%</b>	<b>68,757</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>SECTIONS OPERATIONS</b>						
<b>REVENUE:</b>						
SECTION DUES	440,225	140,335	140,335	299,890	32%	103,650
SEMINAR PROFIT SHARE	147,470	-	-	147,470	0%	(12,289)
INTEREST INCOME	13,120	-	-	13,120	0%	(1,093)
PUBLICATIONS REVENUE	2,000	-	-	2,000	0%	(167)
OTHER	46,880	565	565	46,315	1%	(3,342)
<b>TOTAL REVENUE:</b>	<b>649,695</b>	<b>140,900</b>	<b>140,900</b>	<b>508,795</b>	<b>22%</b>	<b>86,759</b>
<b>DIRECT EXPENSES:</b>						
DIRECT EXPENSES OF SECTION ACTIVITIES	632,503	13,959	13,959	618,544	2%	38,750
REIMBURSEMENT TO WSBA FOR INDIRECT EXPENSES	272,143	92,166	92,166	179,976	34%	(69,488)
<b>TOTAL DIRECT EXPENSES:</b>	<b>904,646</b>	<b>106,125</b>	<b>106,125</b>	<b>798,520</b>	<b>12%</b>	<b>(30,738)</b>
<b>NET INCOME (LOSS):</b>	<b>(254,951)</b>	<b>34,775</b>	<b>34,775</b>	<b>(289,726)</b>	<b>-14%</b>	<b>56,021</b>

**Washington State Bar Association**  
Statement of Activities  
For the Period from October 1, 2022 to October 31, 2022  
**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>TECHNOLOGY</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
CONSULTING SERVICES	110,000	5,508	5,508	104,492	5%	3,659
STAFF TRAVEL/PARKING	2,000	-	-	2,000	0%	167
STAFF MEMBERSHIP DUES	450	-	-	450	0%	38
TELEPHONE	95,000	6,000	6,000	89,000	6%	1,916
COMPUTER HARDWARE	65,000	12,973	12,973	52,027	20%	(7,557)
COMPUTER SOFTWARE	310,000	34,611	34,611	275,389	11%	(8,778)
HARDWARE SERVICE & WARRANTIES	60,000	30,660	30,660	29,340	51%	(25,660)
SOFTWARE MAINTENANCE & LICENSING	380,000	99,411	99,411	280,589	26%	(67,745)
COMPUTER SUPPLIES	2,000	-	-	2,000	0%	167
THIRD PARTY SERVICES	40,000	871	871	39,129	2%	2,462
STAFF CONFERENCE & TRAINING	10,000	-	-	10,000	0%	833
TRANSFER TO INDIRECT EXPENSES	(1,074,450)	(190,035)	(190,035)	(884,415)	18%	100,498
<b>TOTAL DIRECT EXPENSES:</b>	-	-	-	-		-
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (13.00 FTE)	1,434,416	120,621	120,621	1,313,795	8%	(1,086)
BENEFITS EXPENSE	439,894	33,571	33,571	406,323	8%	3,086
CAPITAL LABOR & OVERHEAD	(280,000)	(36,428)	(36,428)	(243,572)	13%	(13,094)
OTHER INDIRECT EXPENSE	402,292	37,541	37,541	364,751	9%	(4,017)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>1,996,602</b>	<b>155,306</b>	<b>155,306</b>	<b>1,841,297</b>	<b>8%</b>	<b>(15,111)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>1,996,602</b>	<b>155,306</b>	<b>155,306</b>	<b>1,841,297</b>	<b>8%</b>	<b>(15,111)</b>
<b>NET INCOME (LOSS):</b>	<b>(1,996,602)</b>	<b>(155,306)</b>	<b>(155,306)</b>	<b>(1,841,297)</b>	<b>8%</b>	<b>11,078</b>

**Washington State Bar Association**

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>VOLUNTEER ENGAGEMENT</b>						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF MEMBERSHIP DUES	350	50	50	300	14%	(21)
STAFF CONFERENCE & TRAINING	2,500	450	450	2,050	18%	(242)
ABA DELEGATES	15,000	-	-	15,000	0%	1,250
<b>TOTAL DIRECT EXPENSES:</b>	<b>17,850</b>	<b>500</b>	<b>500</b>	<b>17,350</b>	<b>3%</b>	<b>988</b>
INDIRECT EXPENSES:						
SALARY EXPENSE (0.60 FTE)	59,415	4,922	4,922	54,493	8%	29
BENEFITS EXPENSE	19,657	1,413	1,413	18,244	7%	225
OTHER INDIRECT EXPENSE	18,567	1,753	1,753	16,815	9%	(205)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>97,639</b>	<b>8,088</b>	<b>8,088</b>	<b>89,551</b>	<b>8%</b>	<b>48</b>
<b>TOTAL ALL EXPENSES:</b>	<b>115,489</b>	<b>8,588</b>	<b>8,588</b>	<b>106,901</b>	<b>7%</b>	<b>48</b>
<b>NET INCOME (LOSS):</b>	<b>(115,489)</b>	<b>(8,588)</b>	<b>(8,588)</b>	<b>(106,901)</b>	<b>7%</b>	<b>1,036</b>

**Washington State Bar Association**  
Statement of Activities  
For the Period from October 1, 2022 to October 31, 2022  
**8% OF YEAR COMPLETE**

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>INDIRECT EXPENSES:</b>						
SALARIES	13,113,765	1,000,005	1,000,005	12,113,760	8%	92,809
ALLOWANCE FOR OPEN POSITIONS	(200,000)	-	-	(200,000)	0%	(16,667)
TEMPORARY SALARIES	200,627	18,294	18,294	182,333	9%	(1,575)
CAPITAL LABOR & OVERHEAD	(280,000)	(36,428)	(36,428)	(243,572)	13%	(13,094)
EMPLOYEE ASSISTANCE PLAN	4,800	400	400	4,400	8%	-
EMPLOYEE SERVICE AWARDS	2,038	120	120	1,918	6%	50
FICA (EMPLOYER PORTION)	806,675	73,196	73,196	733,479	9%	(5,973)
L&I INSURANCE	62,000	-	-	62,000	0%	5,167
WA STATE FAMILY MEDICAL LEAVE (EMPLOYER PORTION)	18,000	1,537	1,537	16,463	9%	(37)
MEDICAL (EMPLOYER PORTION)	1,701,951	128,558	128,558	1,573,393	8%	13,271
RETIREMENT (EMPLOYER PORTION)	1,356,286	103,378	103,378	1,252,908	8%	9,646
TRANSPORTATION ALLOWANCE	65,045	350	350	64,695	1%	5,070
UNEMPLOYMENT INSURANCE	65,206	3,209	3,209	61,997	5%	2,225
<b>TOTAL SALARY &amp; BENEFITS EXPENSE:</b>	<b>16,916,394</b>	<b>1,292,619</b>	<b>1,292,619</b>	<b>15,623,775</b>	<b>8%</b>	<b>90,892</b>
WORKPLACE BENEFITS	45,980	8,919	8,919	37,061	19%	(5,087)
HUMAN RESOURCES POOLED EXP	77,100	4,311	4,311	72,789	6%	2,114
MEETING SUPPORT EXPENSES	10,000	411	411	9,589	4%	423
RENT	2,131,247	155,165	155,165	1,976,082	7%	22,439
PERSONAL PROP TAXES-WSBA	6,650	472	472	6,178	7%	82
FURNITURE, MAINT, LH IMP	25,300	-	-	25,300	0%	2,108
OFFICE SUPPLIES & EQUIPMENT	18,000	1,531	1,531	16,469	9%	(31)
FURN & OFFICE EQUIP DEPRECIATION	96,357	5,228	5,228	91,129	5%	2,802
COMPUTER HARDWARE DEPRECIATION	45,354	3,936	3,936	41,418	9%	(157)
COMPUTER SOFTWARE DEPRECIATION	99,251	7,773	7,773	91,478	8%	498
INSURANCE	272,643	22,025	22,025	250,618	8%	695
WORK HOME FURNITURE & EQUIP	14,000	-	-	14,000	0%	1,167
PROFESSIONAL FEES-AUDIT	50,000	-	-	50,000	0%	4,167
PROFESSIONAL FEES-LEGAL	250,000	9	9	249,991	0%	20,825
ONLINE LEGAL RESEARCH		1,789	1,789	(1,789)		(1,789)
TELEPHONE & INTERNET	33,600	80	80	33,520	0%	2,720
POSTAGE - GENERAL	24,000	1,136	1,136	22,864	5%	864
RECORDS STORAGE	30,000	1,875	1,875	28,125	6%	625
BANK FEES	51,000	2,779	2,779	48,221	5%	1,471
PRODUCTION MAINTENANCE & SUPPLIES	15,340	136	136	15,204	1%	1,143
COMPUTER POOLED EXPENSES	1,074,450	190,035	190,035	884,415	18%	(100,498)
<b>TOTAL OTHER INDIRECT EXPENSES:</b>	<b>4,370,272</b>	<b>407,609</b>	<b>407,609</b>	<b>3,962,663</b>	<b>9%</b>	<b>(43,420)</b>
<b>TOTAL INDIRECT EXPENSES:</b>	<b>21,286,666</b>	<b>1,700,228</b>	<b>1,700,228</b>	<b>19,586,438</b>	<b>8%</b>	<b>73,661</b>

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2022 to October 31, 2022

**8% OF YEAR COMPLETE**

<b>SUMMARY PAGE</b>	<b>FISCAL 2023 BUDGET</b>	<b>CURRENT MONTH</b>	<b>YEAR TO DATE</b>	<b>REMAINING BALANCE</b>
ACCESS TO JUSTICE	(358,902)	(32,641)	(32,641)	(326,260)
ADMISSIONS/BAR EXAM	59,088	181,463	181,463	(122,376)
ADVANCEMENT FTE	(362,565)	(28,806)	(28,806)	(333,759)
BAR NEWS	(93,267)	(19,375)	(19,375)	(73,892)
BOARD OF GOVERNORS	(563,600)	(22,668)	(22,668)	(540,932)
CLE - PRODUCTS	686,086	44,151	44,151	641,935
CLE - SEMINARS	(419,115)	(55,023)	(55,023)	(364,092)
CLIENT PROTECTION FUND	45,788	2,486	2,486	43,302
CHARACTER & FITNESS BOARD	(166,623)	(11,532)	(11,532)	(155,091)
COMMUNICATIONS	(787,329)	(56,606)	(56,606)	(730,723)
COMMUNICATIONS FTE	(243,400)	(20,221)	(20,221)	(223,179)
DESKBOOKS	(49,735)	(18,387)	(18,387)	(31,348)
DISCIPLINE	(6,095,728)	(466,024)	(466,024)	(5,629,704)
DIVERSITY	(360,227)	(18,464)	(18,464)	(341,763)
FINANCE	(1,068,220)	(46,014)	(46,014)	(1,022,207)
FOUNDATION	(152,797)	(12,194)	(12,194)	(140,603)
HUMAN RESOURCES	(291,667)	(48,317)	(48,317)	(243,349)
LAW CLERK PROGRAM	41,201	(11,279)	(11,279)	52,480
LEGISLATIVE	(269,464)	(16,317)	(16,317)	(253,147)
LEGAL LUNCHBOX	(29,617)	(1,737)	(1,737)	(27,879)
LICENSE FEES	17,053,467	1,396,768	1,396,768	15,656,699
LICENSING AND MEMBERSHIP	(189,762)	(25,239)	(25,239)	(164,523)
LIMITED LICENSE LEGAL TECHNICIAN	(71,026)	(6,485)	(6,485)	(64,541)
LIMITED PRACTICE OFFICERS	74,741	15,282	15,282	59,458
MANDATORY CLE ADMINISTRATION	343,906	20,305	20,305	323,601
MEMBER WELLNESS PROGRAM	(230,019)	(14,353)	(14,353)	(215,666)
MINI CLE	(114,412)	(9,454)	(9,454)	(104,958)
MEMBER SERVICES & ENGAGEMENT	(330,678)	(26,160)	(26,160)	(304,518)
NEW MEMBER EDUCATION	(11,869)	3,589	3,589	(15,457)
OFFICE OF GENERAL COUNSEL	(1,056,571)	(79,718)	(79,718)	(976,853)
OFFICE OF THE EXECUTIVE DIRECTOR	(697,034)	(41,850)	(41,850)	(655,184)
OGC-DISCIPLINARY BOARD	(329,139)	(24,781)	(24,781)	(304,359)
PRACTICE OF LAW BOARD	(75,355)	(5,247)	(5,247)	(70,108)
PRACTICE MANAGEMENT ASSISTANCE	(156,433)	(11,035)	(11,035)	(145,398)
PROFESSIONAL RESPONSIBILITY PROGRAM	(153,571)	(19,080)	(19,080)	(134,492)
PUBLIC SERVICE PROGRAMS	(356,257)	(18,593)	(18,593)	(337,664)
PUBLICATION & DESIGN SERVICES	(123,787)	(14,009)	(14,009)	(109,778)
REGULATORY SERVICES FTE	(560,458)	(38,201)	(38,201)	(522,256)
SECTIONS ADMINISTRATION	(8,053)	68,086	68,086	(76,140)
SECTIONS OPERATIONS	(254,951)	34,775	34,775	(289,726)
SERVICE CENTER	(713,681)	(59,255)	(59,255)	(654,426)
TECHNOLOGY	(1,996,602)	(155,306)	(155,306)	(1,841,297)
VOLUNTEER EDUCATION	(115,489)	(8,588)	(8,588)	(106,901)
INDIRECT EXPENSES	21,286,666	1,700,228	1,700,228	19,586,438
<b>TOTAL OF ALL</b>	<b>(20,733,539)</b>	<b>(2,024,174)</b>	<b>(2,024,174)</b>	<b>(18,709,365)</b>
<b>NET INCOME (LOSS)</b>	<b>(553,127)</b>	<b>323,946</b>	<b>323,946</b>	<b>(877,073)</b>

**Washington State Bar Association  
Analysis of Cash Investments  
As of October 31, 2022**

**Checking & Savings Accounts**

**General Fund**

**Checking**

<b><u>Bank</u></b>	<b><u>Account</u></b>	<b><u>Amount</u></b>
Wells Fargo	General	\$ 935,577

Total

<b><u>Investments</u></b>	<b><u>Rate</u></b>	<b><u>Amount</u></b>
Wells Fargo Money Market	0.27%	\$ 5,472,919
UBS Financial Money Market	0.14%	\$ 1,086,556
Morgan Stanley Money Market	0.25%	\$ 3,385,812
Merrill Lynch Money Market	0.18%	\$ 1,997,170
CDs/Treasuries	see list	\$ 1,992,752

**General Fund Total \$ 14,870,786**

**Client Protection Fund**

**Checking**

<b><u>Bank</u></b>	<b><u>Amount</u></b>
Wells Fargo	\$ 384,325

<b><u>Investments</u></b>	<b><u>Rate</u></b>	<b><u>Amount</u></b>
Wells Fargo Money Market	0.19%	\$ 4,441,818
Morgan Stanley Money Market	0.22%	\$ 107,717

**Client Protection Fund Total \$ 4,933,860**

**Grand Total Cash & Investments \$ 19,804,646**

**Washington State Bar Association  
Analysis of Cash Investments  
As of October 31, 2022**

**Investments as of 10/31/22**

**General Fund**

<u>Bank</u>	<u>Yield</u>	<u>Term</u>	<u>Trade Date</u>	<u>Settle Date</u>	<u>Maturity Date</u>	<u>Amount</u>
US Treasury Bill	2.30%	3m	7/28/2022	7/29/2022	11/3/2022	248,481
Customers Bank Phoenixville PA CD	2.80%	3m	9/7/2022	9/15/2022	12/15/2022	250,000
US Treasury Bill	2.90%	4m	9/7/2022	9/13/2022	1/10/2023	247,653
Silvergate Bank CD	2.90%	4m	9/7/2022	9/14/2022	1/17/2023	250,000
US Treasury Bill	2.75%	6m	7/28/2022	7/28/2022	2/3/2023	246,618
Bank Baroda NY CD	3.00%	5m	9/7/2022	9/16/2022	2/16/2023	250,000
Beal Bank USA CD	2.80%	9m	7/28/2022	8/10/2022	5/10/2023	250,000
State Bank of India NY CD	3.10%	1y	7/28/2022	8/8/2022	8/8/2023	250,000

**Total                      1,992,752**



**WASHINGTON STATE**  
**B A R A S S O C I A T I O N**

# **Financial Reports**

**(Unaudited)**

**Year to Date September 30, 2022**

**Prepared by**

**Maggie Yu, Controller & Darshita Patel, Accountant**

**Submitted by**

**Tiffany Lynch, Director of Finance**

**December 12, 2022**

**Washington State Bar Association Financial Summary**  
**Compared to Fiscal Year 2022 Reforecast**  
**For the Period from September 1, 2022 to September 30, 2022**

Category	Actual Revenues	Reforecasted Revenues	Actual Indirect Expenses	Reforecasted Indirect Expenses	Actual Direct Expenses	Reforecasted Direct Expenses	Actual Total Expenses	Reforecasted Total Expenses	Actual Net Result	Reforecasted Net Result
Access to Justice	-	-	159,861	152,194	21,885	49,175	181,745	201,369	(181,745)	(201,369)
Administration	105,118	7,520	1,036,567	1,022,741	460	13,150	1,037,027	1,035,891	(931,909)	(1,028,371)
Admissions/Bar Exam	1,228,615	1,269,353	896,656	861,929	342,952	388,157	1,239,607	1,250,086	(10,992)	19,267
Advancement FTE	-	-	340,795	342,229	2,924	4,267	343,719	346,495	(343,719)	(346,495)
Bar News	661,041	621,700	334,648	327,222	321,719	378,800	656,367	706,022	4,674	(84,322)
Board of Governors	-	-	175,924	180,684	321,588	329,380	497,512	510,064	(497,512)	(510,064)
Character & Fitness Board	-	-	18,624	43,720	3,379	25,000	22,004	68,720	(22,004)	(68,720)
Communications Strategies	4,122	1,113	622,039	625,393	90,837	98,408	712,876	723,801	(708,755)	(722,688)
Communications Strategies FTE	-	-	222,579	225,526	-	-	222,579	225,526	(222,579)	(225,526)
Discipline	105,767	122,036	5,577,763	5,665,662	165,886	213,924	5,743,648	5,879,586	(5,637,881)	(5,757,549)
Diversity	135,000	135,000	272,950	277,700	43,328	154,720	316,278	432,420	(181,278)	(297,420)
EJD FTE	-	-	210,059	191,583	-	-	210,059	191,583	(210,059)	(191,583)
Foundation	-	-	123,441	126,340	4,221	6,090	127,662	132,430	(127,662)	(132,430)
Human Resources	-	-	481,345	459,945	-	-	481,345	459,945	(481,345)	(459,945)
Law Clerk Program	197,804	222,500	119,334	125,989	250	5,683	119,584	131,672	78,220	90,828
Legislative	-	-	213,608	228,227	12,311	24,883	225,920	253,110	(225,920)	(253,110)
Legal Lunchbox	46,289	42,000	44,742	48,136	-	100	44,742	48,236	1,547	(6,236)
Licensing and Membership Records	455,695	411,503	586,985	599,433	25,267	24,619	612,252	624,052	(156,557)	(212,549)
Licensing Fees	16,857,886	16,512,089	-	-	-	-	0	-	16,857,886	16,512,089
Limited License Legal Technician	19,041	17,484	71,114	63,587	14,333	19,949	85,447	83,536	(66,406)	(66,052)
Limited Practice Officers	219,368	213,795	98,861	84,798	17,702	29,690	116,563	114,489	102,805	99,307
Mandatory CLE	1,464,350	1,382,807	658,842	654,787	27,102	33,442	685,944	688,230	778,406	694,577
Member Wellness Program	9,375	7,292	176,244	194,191	10,426	14,542	186,670	208,733	(177,295)	(201,441)
Member Services & Engagement	13,200	20,000	402,117	416,320	6,265	23,250	408,382	439,570	(395,182)	(419,570)
Mini CLE	-	-	99,382	106,712	-	-	99,382	106,712	(99,382)	(106,712)
New Member Education	45,915	91,500	85,773	90,056	-	2,000	85,773	92,056	(39,858)	(556)
Office of General Counsel	1,126	3	958,722	951,241	16,377	28,071	975,098	979,313	(973,973)	(979,310)
Office of the Executive Director	-	-	458,209	519,115	53,301	76,932	511,510	596,047	(511,510)	(596,047)
OGC-Disciplinary Board	-	-	176,484	179,945	82,171	128,591	258,656	308,536	(258,656)	(308,536)
Practice of Law Board	-	-	70,384	67,261	-	12,000	70,384	79,261	(70,384)	(79,261)
Practice Management Assistance	62,097	40,226	-	-	75,196	80,400	75,196	80,400	(13,099)	(40,174)
Professional Responsibility Program	-	-	258,216	273,637	770	6,827	258,987	280,465	(258,987)	(280,465)
Public Service Programs	130,000	130,000	147,539	138,075	250,929	258,280	398,468	396,355	(268,468)	(266,355)
Publication and Design Services	-	-	106,692	109,040	4,200	4,300	110,892	113,340	(110,892)	(113,340)
Regulatory Services FTE	-	-	493,218	508,467	-	7,500	493,218	515,967	(493,218)	(515,967)
Sections Administration	273,426	284,000	266,072	281,993	5,133	6,893	271,205	288,886	2,221	(4,886)
Service Center	-	-	648,930	661,923	7,016	10,600	655,946	672,523	(655,946)	(672,523)
Volunteer Engagement	-	-	92,108	93,798	7,773	51,150	99,881	144,948.38	(99,881)	(144,948)
Technology	-	-	1,751,613	1,886,393	-	-	1,751,613	1,886,393	(1,751,613)	(1,886,393)
<b>Subtotal General Fund</b>	<b>22,035,235</b>	<b>21,531,920</b>	<b>18,458,441</b>	<b>18,785,994</b>	<b>1,935,700</b>	<b>2,510,772</b>	<b>20,394,141</b>	<b>21,296,766</b>	<b>1,641,094</b>	<b>235,154</b>
Expenses using reserve funds										
<b>Total General Fund - Net Result from Operations</b>									<b>1,641,094</b>	<b>235,154</b>
<b>Percentage of Budget</b>	<b>102%</b>		<b>98%</b>		<b>77%</b>		<b>96%</b>			
CLE-Seminars and Products	1,686,481	2,055,081	1,010,806	994,140	153,567	288,841	1,164,373	1,282,981	522,108	772,100
CLE - Deskbooks	114,668	164,600	208,568	211,400	34,951	68,725	243,519	280,125	(128,851)	(115,525)
Total CLE	1,801,149	2,219,681	1,219,374	1,205,540	188,518	357,566	1,407,892	1,563,106	393,257	656,575
<b>Percentage of Budget</b>	<b>81%</b>		<b>101%</b>		<b>53%</b>		<b>90%</b>			
Total All Sections	761,693	637,652	-	-	467,886	899,652	467,886	899,652	293,807	(262,000)
Client Protection Fund-Restricted	749,227	828,319	162,490	167,313	569,482	503,767	731,972	671,081	17,256	157,238
<b>Totals</b>	<b>25,347,304</b>	<b>25,217,572</b>	<b>19,840,305</b>	<b>20,158,848</b>	<b>3,161,585</b>	<b>4,271,757</b>	<b>23,001,891</b>	<b>24,430,604</b>	<b>2,345,413</b>	<b>786,968</b>
<b>Percentage of Budget</b>	<b>101%</b>		<b>98%</b>		<b>74%</b>		<b>94%</b>			

Summary of Fund Balances:	Fund Balances Sept. 30, 2021	2022 Reforecasted Fund Balances	Fund Balances Year to date
<b>Restricted Funds:</b>			
Client Protection Fund	4,046,246	4,203,484	4,063,501
<b>Board-Designated Funds (Non-General Fund):</b>			
CLE Fund Balance	648,792	1,305,367	1,042,049
Section Funds	1,508,843	1,246,843	1,802,650
<b>Board-Designated Funds (General Fund):</b>			
Operating Reserve Fund	1,500,000	1,500,000	2,000,000
Facilities Reserve Fund	1,050,000	1,050,000	1,000,000
<b>Unrestricted Funds (General Fund):</b>			
Unrestricted General Fund	4,522,174	4,757,328	5,713,268
<b>Total General Fund Balance</b>	<b>7,072,174</b>	<b>7,307,328</b>	<b>8,713,268</b>
<b>Net Change in Total General Fund Balance</b>		<b>235,154</b>	<b>1,641,094</b>
<b>Total Fund Balance</b>	<b>13,276,054</b>	<b>14,063,022</b>	<b>15,621,468</b>
<b>Net Change In Fund Balance</b>		<b>786,968</b>	<b>2,345,413</b>

**Washington State Bar Association**

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	<b>FISCAL 2022 REFORECAST</b>	<b>CURRENT MONTH</b>	<b>YEAR TO DATE</b>	<b>REMAINING BALANCE</b>	<b>% USED OF REFORECAST</b>	<b>YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)</b>
<b>LICENSE FEES</b>						
<b>REVENUE:</b>						
LICENSE FEES	16,512,089	1,405,401	16,857,886	(345,798)	102%	345,798
<b>TOTAL REVENUE:</b>	<b>16,512,089</b>	<b>1,405,401</b>	<b>16,857,886</b>	<b>(345,798)</b>	<b>102%</b>	<b>345,798</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>ACCESS TO JUSTICE</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
SURVEYS	100	-	-	100	0%	100
ATJ BOARD RETREAT	2,000	-	396	1,604	20%	1,604
LEADERSHIP TRAINING	2,000	-	2,000	0	100%	0
ATJ BOARD EXPENSE	24,000	4,552	13,656	10,344	57%	10,344
STAFF TRAVEL/PARKING	2,700	49	258	2,442	10%	2,442
STAFF CONFERENCE & TRAINING	2,875	-	350	2,525	12%	2,525
PUBLIC DEFENSE	6,000	5,000	5,225	775	87%	775
RECEPTION/FORUM EXPENSE	9,500	-	-	9,500	0%	9,500
<b>TOTAL DIRECT EXPENSES:</b>	<b>49,175</b>	<b>9,601</b>	<b>21,885</b>	<b>27,290</b>	<b>45%</b>	<b>27,290</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.30 FTE)	83,512	7,048	91,005	(7,492)	109%	(7,492)
BENEFITS EXPENSE	32,843	4,042	33,679	(836)	103%	(836)
OTHER INDIRECT EXPENSE	35,839	2,838	35,177	662	98%	662
<b>TOTAL INDIRECT EXPENSES:</b>	<b>152,194</b>	<b>13,928</b>	<b>159,861</b>	<b>(7,667)</b>	<b>105%</b>	<b>(7,667)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>201,369</b>	<b>23,529</b>	<b>181,745</b>	<b>19,624</b>	<b>90%</b>	<b>19,624</b>
<b>NET INCOME (LOSS):</b>	<b>(201,369)</b>	<b>(23,529)</b>	<b>(181,745)</b>	<b>(19,624)</b>	<b>90%</b>	<b>19,624</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>ADMINISTRATION</b>						
<b>REVENUE:</b>						
INTEREST INCOME	5,160	26,431	105,118	(99,958)	2037%	99,958
MISCELLANEOUS	2,360	-	-	2,360	0%	(2,360)
<b>TOTAL REVENUE:</b>	<b>7,520</b>	<b>26,431</b>	<b>105,118</b>	<b>(97,598)</b>	<b>1398%</b>	<b>97,598</b>
<b>DIRECT EXPENSES:</b>						
CONSULTING SERVICES	10,000	-	-	10,000	0%	10,000
STAFF TRAVEL/PARKING	2,800	134	460	2,340	16%	2,340
STAFF CONFERENCE & TRAINING	350	-	-	350	0%	350
MISCELLANEOUS	-	(66)	-	-		-
<b>TOTAL DIRECT EXPENSES:</b>	<b>13,150</b>	<b>68</b>	<b>460</b>	<b>12,690</b>	<b>3%</b>	<b>12,690</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (6.92 FTE)	644,230	52,274	655,639	(11,410)	102%	(11,410)
BENEFITS EXPENSE	185,078	21,741	194,403	(9,325)	105%	(9,325)
OTHER INDIRECT EXPENSE	193,433	15,051	186,525	6,908	96%	6,908
<b>TOTAL INDIRECT EXPENSES:</b>	<b>1,022,741</b>	<b>89,066</b>	<b>1,036,567</b>	<b>(13,827)</b>	<b>101%</b>	<b>(13,827)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>1,035,891</b>	<b>89,135</b>	<b>1,037,027</b>	<b>(1,136)</b>	<b>100%</b>	<b>(1,136)</b>
<b>NET INCOME (LOSS):</b>	<b>(1,028,371)</b>	<b>(62,704)</b>	<b>(931,909)</b>	<b>(96,462)</b>	<b>91%</b>	<b>96,462</b>

**Washington State Bar Association**  
Statement of Activities  
For the Period from September 1, 2022 to September 30, 2022  
**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>ADMISSIONS</b>						
<b>REVENUE:</b>						
EXAM SOFT REVENUE	-	21,155	28,150	(28,150)		28,150
BAR EXAM FEES	1,212,376	-	1,137,525	74,851	94%	(74,851)
RULE 9/LEGAL INTERN FEES	11,242	800	12,350	(1,108)	110%	1,108
SPECIAL ADMISSIONS	45,734	920	50,590	(4,856)	111%	4,856
<b>TOTAL REVENUE:</b>	<b>1,269,353</b>	<b>22,875</b>	<b>1,228,615</b>	<b>40,738</b>	<b>97%</b>	<b>(40,738)</b>
<b>DIRECT EXPENSES:</b>						
POSTAGE	1,200	-	-	1,200	0%	1,200
STAFF TRAVEL/PARKING	12,136	11,433	23,795	(11,659)	196%	(11,659)
STAFF MEMBERSHIP DUES	800	-	250	550	31%	550
SUPPLIES	2,500	-	2,710	(210)	108%	(210)
FACILITY, PARKING, FOOD	93,038	(3,988)	76,311	16,727	82%	16,727
EXAMINER FEES	36,000	4,000	31,500	4,500	88%	4,500
UBE EXMINATIONS	126,900	-	110,110	16,790	87%	16,790
BOARD OF BAR EXAMINERS	23,000	-	4,251	18,749	18%	18,749
BAR EXAM PROCTORS	31,000	1,007	31,952	(952)	103%	(952)
DISABILITY ACCOMMODATIONS	20,500	15,239	26,406	(5,906)	129%	(5,906)
CHARACTER & FITNESS INVESTIGATIONS	2,000	-	108	1,892	5%	1,892
LAW SCHOOL VISITS	850	-	354	496	42%	496
DEPRECIATION-SOFTWARE	21,235	2,037	24,520	(3,285)	115%	(3,285)
STAFF CONFERENCE & TRAINING	13,380	(763)	6,729	6,651	50%	6,651
ONLINE LEGAL RESEARCH	3,467	651	3,817	(350)	110%	(350)
LAW LIBRARY	151	12	138	12	92%	12
<b>TOTAL DIRECT EXPENSES:</b>	<b>388,157</b>	<b>29,628</b>	<b>342,952</b>	<b>45,205</b>	<b>88%</b>	<b>45,205</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (6.75 FTE)	497,669	48,952	535,723	(38,054)	108%	(38,054)
BENEFITS EXPENSE	165,832	20,254	174,798	(8,965)	105%	(8,965)
OTHER INDIRECT EXPENSE	198,428	15,019	186,135	12,292	94%	12,292
<b>TOTAL INDIRECT EXPENSES:</b>	<b>861,929</b>	<b>84,225</b>	<b>896,656</b>	<b>(34,727)</b>	<b>104%</b>	<b>(34,727)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>1,250,086</b>	<b>113,853</b>	<b>1,239,607</b>	<b>10,478</b>	<b>99%</b>	<b>10,478</b>
<b>NET INCOME (LOSS):</b>	<b>19,267</b>	<b>(90,978)</b>	<b>(10,992)</b>	<b>30,259</b>	<b>-57%</b>	<b>(30,259)</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>ADVANCEMENT FTE</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
STAFF CONFERENCE & TRAINING	4,267	-	2,924	1,342	69%	1,342
<b>TOTAL DIRECT EXPENSES:</b>	<b>4,267</b>	<b>-</b>	<b>2,924</b>	<b>1,342</b>	<b>69%</b>	<b>1,342</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.90 FTE)	224,156	18,192	223,017	1,139	99%	1,139
BENEFITS EXPENSE	61,974	7,631	66,651	(4,677)	108%	(4,677)
OTHER INDIRECT EXPENSE	56,099	4,130	51,127	4,972	91%	4,972
<b>TOTAL INDIRECT EXPENSES:</b>	<b>342,229</b>	<b>29,953</b>	<b>340,795</b>	<b>1,434</b>	<b>100%</b>	<b>1,434</b>
<b>TOTAL ALL EXPENSES:</b>	<b>346,495</b>	<b>29,953</b>	<b>343,719</b>	<b>2,776</b>	<b>99%</b>	<b>2,776</b>
<b>NET INCOME (LOSS):</b>	<b>(346,495)</b>	<b>(29,953)</b>	<b>(343,719)</b>	<b>(2,776)</b>	<b>99%</b>	<b>2,776</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>BAR NEWS</b>						
<b>REVENUE:</b>						
ROYALTIES	2,500	1,443	5,310	(2,810)	212%	2,810
DISPLAY ADVERTISING	400,000	36,145	331,332	68,668	83%	(68,668)
SUBSCRIPT/SINGLE ISSUES	200	-	72	128	36%	(128)
CLASSIFIED ADVERTISING	2,500	3,605	11,083	(8,583)	443%	8,583
GEN ANNOUNCEMENTS	14,000	3,129	17,344	(3,344)	124%	3,344
PROF ANNOUNCEMENTS	22,500	2,727	24,086	(1,586)	107%	1,586
JOB TARGET ADVERTISING	180,000	40,329	271,814	(91,814)	151%	91,814
<b>TOTAL REVENUE:</b>	<b>621,700</b>	<b>87,377</b>	<b>661,041</b>	<b>(39,341)</b>	<b>106%</b>	<b>39,341</b>
<b>DIRECT EXPENSES:</b>						
POSTAGE	100,000	12,355	103,134	(3,134)	103%	(3,134)
PRINTING, COPYING & MAILING	260,000	19,596	205,953	54,047	79%	54,047
DIGITAL/ONLINE DEVELOPMENT	16,200	9,655	9,815	6,385	61%	6,385
GRAPHICS/ARTWORK	200	-	-	200	0%	200
OUTSIDE SALES EXPENSE	1,730	-	1,730	-	100%	-
STAFF CONFERENCE & TRAINING	350	-	997	(647)	285%	(647)
STAFF MEMBERSHIP DUES	135	-	-	135	0%	135
SUBSCRIPTIONS	185	-	90	95	49%	95
<b>TOTAL DIRECT EXPENSES:</b>	<b>378,800</b>	<b>41,605</b>	<b>321,719</b>	<b>57,081</b>	<b>85%</b>	<b>57,081</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (2.26 FTE)	202,410	16,679	203,354	(944)	100%	(944)
BENEFITS EXPENSE	53,718	6,153	56,755	(3,037)	106%	(3,037)
OTHER INDIRECT EXPENSE	71,093	6,015	74,539	(3,446)	105%	(3,446)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>327,222</b>	<b>28,847</b>	<b>334,648</b>	<b>(7,426)</b>	<b>102%</b>	<b>(7,426)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>706,022</b>	<b>70,452</b>	<b>656,367</b>	<b>49,655</b>	<b>93%</b>	<b>49,655</b>
<b>NET INCOME (LOSS):</b>	<b>(84,322)</b>	<b>16,925</b>	<b>4,674</b>	<b>(88,996)</b>	<b>-6%</b>	<b>88,996</b>



**Washington State Bar Association**  
Statement of Activities  
For the Period from September 1, 2022 to September 30, 2022  
**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>BOARD OF GOVERNOR</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
BOG MEETINGS	146,665	53,287	167,735	(21,070)	114%	(21,070)
BOG COMMITTEES' EXPENSES	501	7	233	268	47%	268
BOG RETREAT	15,042	-	66	14,976	0%	14,976
BOG CONFERENCE ATTENDANCE	57,400	9,383	57,070	330	99%	330
BOG TRAVEL & OUTREACH	30,000	1,028	19,387	10,613	65%	10,613
LEADERSHIP TRAINING	26,000	1,004	23,576	2,424	91%	2,424
BOG ELECTIONS	26,000	-	15,900	10,100	61%	10,100
MEMBER OUTREACH/ETHOS MEETINGS	17,772	442	18,786	(1,014)	106%	(1,014)
PRESIDENT'S DINNER	10,000	11,570	11,570	(1,570)	116%	(1,570)
CONSULTING SERVICES	-	2,243	7,264	(7,264)		(7,264)
<b>TOTAL DIRECT EXPENSES:</b>	<b>329,380</b>	<b>78,965</b>	<b>321,588</b>	<b>7,792</b>	<b>98%</b>	<b>7,792</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.40 FTE)	104,745	10,153	104,367	378	100%	378
BENEFITS EXPENSE	34,464	3,867	33,720	744	98%	744
OTHER INDIRECT EXPENSE	41,476	3,053	37,837	3,638	91%	3,638
<b>TOTAL INDIRECT EXPENSES:</b>	<b>180,684</b>	<b>17,074</b>	<b>175,924</b>	<b>4,760</b>	<b>97%</b>	<b>4,760</b>
<b>TOTAL ALL EXPENSES:</b>	<b>510,064</b>	<b>96,039</b>	<b>497,512</b>	<b>12,552</b>	<b>98%</b>	<b>12,552</b>
<b>NET INCOME (LOSS):</b>	<b>(510,064)</b>	<b>(96,039)</b>	<b>(497,512)</b>	<b>(12,552)</b>	<b>98%</b>	<b>12,552</b>

**Washington State Bar Association**  
Statement of Activities  
For the Period from September 1, 2022 to September 30, 2022  
**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>CHARACTER &amp; FITNESS BOARD</b>						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CHARACTER & FITNESS BOARD EXP	10,000	-	123	9,877	1%	9,877
COURT REPORTERS	15,000	-	3,256	11,744	22%	11,744
<b>TOTAL DIRECT EXPENSES:</b>	<b>25,000</b>	<b>-</b>	<b>3,379.42</b>	<b>21,621</b>	<b>14%</b>	<b>21,621</b>
INDIRECT EXPENSES:						
SALARY EXPENSE (0.40 FTE)	26,274	3,121	14,315	11,960	54%	11,960
BENEFITS EXPENSE	8,456	271	2,796	5,660	33%	5,660
OTHER INDIRECT EXPENSE	8,990	122	1,513	7,477	17%	7,477
<b>TOTAL INDIRECT EXPENSES:</b>	<b>43,720</b>	<b>3,514</b>	<b>18,624</b>	<b>25,096</b>	<b>43%</b>	<b>25,096</b>
<b>TOTAL ALL EXPENSES:</b>	<b>68,720</b>	<b>3,514</b>	<b>22,004</b>	<b>46,717</b>	<b>32%</b>	<b>46,717</b>
<b>NET INCOME (LOSS):</b>	<b>(68,720)</b>	<b>(3,514)</b>	<b>(22,004)</b>	<b>(46,717)</b>	<b>32%</b>	<b>46,717</b>

**Washington State Bar Association**  
Statement of Activities  
For the Period from September 1, 2022 to September 30, 2022  
**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>LAW CLERK PROGRAM</b>						
<b>REVENUE:</b>						
LAW CLERK FEES	220,000	1,167	194,104	25,896	88%	(25,896)
LAW CLERK APPLICATION FEES	2,500	800	3,700	(1,200)	148%	1,200
<b>TOTAL REVENUE:</b>	<b>222,500</b>	<b>1,967</b>	<b>197,804</b>	<b>24,696</b>	<b>89%</b>	<b>(24,696)</b>
<b>DIRECT EXPENSES:</b>						
SUBSCRIPTIONS	250	250	250	-	100%	-
CHARACTER & FITNESS INVESTIGATIONS	100	-	-	100	0%	100
LAW CLERK BOARD EXPENSE	4,667	-	-	4,667	0%	4,667
LAW CLERK OUTREACH	667	-	-	667	0%	667
<b>TOTAL DIRECT EXPENSES:</b>	<b>5,683</b>	<b>250</b>	<b>250</b>	<b>5,433</b>	<b>4%</b>	<b>5,433</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (0.98 FTE)	74,451	6,730	72,744	1,707	98%	1,707
BENEFITS EXPENSE	23,077	2,452	21,617	1,460	94%	1,460
OTHER INDIRECT EXPENSE	28,461	2,015	24,972	3,488	88%	3,488
<b>TOTAL INDIRECT EXPENSES:</b>	<b>125,989</b>	<b>11,198</b>	<b>119,334</b>	<b>6,655</b>	<b>95%</b>	<b>6,655</b>
<b>TOTAL ALL EXPENSES:</b>	<b>131,672</b>	<b>11,448</b>	<b>119,584</b>	<b>12,088</b>	<b>91%</b>	<b>12,088</b>
<b>NET INCOME (LOSS):</b>	<b>90,828</b>	<b>(9,481)</b>	<b>78,220</b>	<b>12,608</b>	<b>86%</b>	<b>(12,608)</b>

**Washington State Bar Association**  
Statement of Activities  
For the Period from September 1, 2022 to September 30, 2022  
**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>CONTINUING LEGAL EDUCATION (CLE)</b>						
<b>REVENUE:</b>						
SEMINAR REGISTRATIONS	790,000	82,779	633,144	156,856	80%	(156,856)
SEMINAR REVENUE-OTHER	5,000	6,000	12,000	(7,000)	240%	7,000
SEMINAR SPLITS W/ CLE	-	(234,244)	(261,469)	261,469		(261,469)
SHIPPING & HANDLING	81	18	225	(144)	278%	144
COURSEBOOK SALES	5,717	140	1,790	3,927	31%	(3,927)
MP3 AND VIDEO SALES	1,254,283	34,768	1,300,791	(46,508)	104%	46,508
<b>TOTAL REVENUE:</b>	<b>2,055,081</b>	<b>(110,539)</b>	<b>1,686,481</b>	<b>368,600</b>	<b>82%</b>	<b>(411,325)</b>
<b>DIRECT EXPENSES:</b>						
POSTAGE - FLIERS/CATALOGS	-	149	149	(149)		(149)
DEPRECIATION	1,312	109	1,312	-	100%	-
ONLINE EXPENSES	54,000	5,409	51,091	2,909	95%	2,909
ACCREDITATION FEES	3,000	(108)	1,788	1,212	60%	1,212
FACILITIES	83,200	26,659	71,651	11,549	86%	11,549
DISABILITY ACCOMMODATIONS	1,333	-	-	1,333	0%	1,333
SPEAKERS & PROGRAM DEVELOP	15,000	492	13,690	1,310	91%	1,310
SPLITS TO SECTIONS	115,000	-	-	115,000	0%	115,000
HONORARIA	1,500	-	3,000	(1,500)	200%	(1,500)
CLE SEMINAR COMMITTEE	150	-	-	150	0%	150
STAFF TRAVEL/PARKING	10,096	6,168	9,428	668	93%	668
STAFF CONFERENCE & TRAINING	467	-	-	467	0%	467
STAFF MEMBERSHIP DUES	471	-	1,145	(674)	243%	(674)
COST OF SALES - COURSEBOOKS	1,054	9	141	913	13%	913
A/V DEVELOP COSTS (RECORDING)	2,000	-	-	2,000	0%	2,000
POSTAGE & DELIVERY-COURSEBOOKS	58	8	173	(115)	297%	(115)
STAFF TRAVEL/PARKING	200	-	-	200	0%	200
<b>TOTAL DIRECT EXPENSES:</b>	<b>288,841</b>	<b>38,896</b>	<b>153,567</b>	<b>135,274</b>	<b>53%</b>	<b>135,274</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (8.12 FTE)	555,791	45,195	572,244	(16,453)	103%	(16,453)
BENEFITS EXPENSE	203,474	26,685	219,485	(16,011)	108%	(16,011)
OTHER INDIRECT EXPENSE	234,875	17,679	219,077	15,798	93%	15,798
<b>TOTAL INDIRECT EXPENSES:</b>	<b>994,140</b>	<b>89,558</b>	<b>1,010,806</b>	<b>(16,666)</b>	<b>102%</b>	<b>(16,666)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>1,282,981</b>	<b>128,454</b>	<b>1,164,373</b>	<b>118,608</b>	<b>91%</b>	<b>118,608</b>
<b>NET INCOME (LOSS):</b>	<b>772,100</b>	<b>(238,993)</b>	<b>522,108</b>	<b>249,991</b>	<b>68%</b>	<b>(249,991)</b>

**Washington State Bar Association**

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	<b>FISCAL 2022 REFORECAST</b>	<b>CURRENT MONTH</b>	<b>YEAR TO DATE</b>	<b>REMAINING BALANCE</b>	<b>% USED OF REFORECAST</b>	<b>YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)</b>
<b>COMMUNICATION STRATEGIES FTE</b>						
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.00 FTE)	155,294	12,946	154,665	629	100%	629
BENEFITS EXPENSE	40,656	4,568	41,050	(393)	101%	(393)
OTHER INDIRECT EXPENSE	29,575	2,168	26,865	2,711	91%	2711
TOTAL INDIRECT EXPENSES:	<u>225,526</u>	<u>19,682</u>	<u>222,579</u>	<u>2,947</u>	<u>99%</u>	<u>2,947</u>
NET INCOME (LOSS):	<u>(225,526)</u>	<u>(19,682)</u>	<u>(222,579)</u>	<u>(2,947)</u>	<u>99%</u>	<u>2,947</u>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>COMMUNICATION STRATEGIES</b>						
<b>REVENUE:</b>						
SPONSORSHIPS	1,000	-	1,000	-	100%	-
50 YEAR MEMBER TRIBUTE LUNCH	-	-	480	(480)		480
WSBA LOGO MERCHANDISE SALES	113	-	2,642	(2,528)	2333%	2,528
<b>TOTAL REVENUE:</b>	<b>1,113</b>	<b>-</b>	<b>4,122</b>	<b>(3,008)</b>	<b>370%</b>	<b>3,008</b>
<b>DIRECT EXPENSES:</b>						
STAFF TRAVEL/PARKING	3,395	198	4,003	(608)	118%	(608)
STAFF MEMBERSHIP DUES	1,028	-	740	288	72%	288
SUBSCRIPTIONS	3,635	274	3,468	167	95%	167
DIGITAL/ONLINE DEVELOPMENT	409	-	331	79	81%	79
APEX DINNER	43,416	39,393	46,461	(3,045)	107%	(3,045)
50 YEAR MEMBER TRIBUTE LUNCH	23,007	5,055	30,070	(7,064)	131%	(7,064)
BAR OUTREACH	11,681	-	1,353	10,329	12%	10,329
COMMUNICATIONS OUTREACH	10,680	327	1,298	9,382	12%	9,382
STAFF CONFERENCE & TRAINING	-	2,227	2,358	(2,358)		(2,358)
TELEPHONE	1,056	47	756	300	72%	300
CONFERENCE CALLS	101	-	-	101	0%	101
<b>TOTAL DIRECT EXPENSES:</b>	<b>98,408</b>	<b>47,521</b>	<b>90,837</b>	<b>7,571</b>	<b>92%</b>	<b>7,571</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (5.17 FTE)	356,472	30,812	354,285	2,187	99%	2,187
BENEFITS EXPENSE	115,908	15,190	128,514	(12,607)	111%	(12,607)
OTHER INDIRECT EXPENSE	153,013	11,237	139,241	13,773	91%	13,773
<b>TOTAL INDIRECT EXPENSES:</b>	<b>625,393</b>	<b>57,239</b>	<b>622,039</b>	<b>3,354</b>	<b>99%</b>	<b>3,354</b>
<b>TOTAL ALL EXPENSES:</b>	<b>723,801</b>	<b>104,760</b>	<b>712,876</b>	<b>10,925</b>	<b>98%</b>	<b>10,925</b>
<b>NET INCOME (LOSS):</b>	<b>(722,688)</b>	<b>(104,760)</b>	<b>(708,755)</b>	<b>(13,933)</b>	<b>98%</b>	<b>13,933</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>CLIENT PROTECTION FUND</b>						
<b>REVENUE:</b>						
CPF RESTITUTION	30,000	247	8,906	21,094	30%	(21,094)
CPF MEMBER ASSESSMENTS	792,503	6,900	704,366	88,137	89%	(88,137)
INTEREST INCOME	5,816	11,657	35,955	(30,139)	618%	30,139
<b>TOTAL REVENUE:</b>	<b>828,319</b>	<b>18,804</b>	<b>749,227</b>	<b>79,092</b>	<b>90%</b>	<b>(79,092)</b>
<b>DIRECT EXPENSES:</b>						
BANK FEES - WELLS FARGO	2,067	189	2,145	(78)	104%	(78)
GIFTS TO INJURED CLIENTS	500,000	502,968	566,947	(66,947)	113%	(66,947)
CPF BOARD EXPENSES	1,500	121	390	1,110	26%	1,110
STAFF MEMBERSHIP DUES	200	-	-	200	0%	200
<b>TOTAL DIRECT EXPENSES:</b>	<b>503,767</b>	<b>503,278</b>	<b>569,482</b>	<b>(65,715)</b>	<b>113%</b>	<b>(65,715)</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.23 FTE)	95,800	8,384	95,157	643	99%	643
BENEFITS EXPENSE	35,058	4,101	34,036	1,021	97%	1,021
OTHER INDIRECT EXPENSE	36,456	2,687	33,297	3,159	91%	3,159
<b>TOTAL INDIRECT EXPENSES:</b>	<b>167,313</b>	<b>15,172</b>	<b>162,490</b>	<b>4,824</b>	<b>97%</b>	<b>4,824</b>
<b>TOTAL ALL EXPENSES:</b>	<b>671,081</b>	<b>518,450</b>	<b>731,972</b>	<b>(60,891)</b>	<b>109%</b>	<b>(60,891)</b>
<b>NET INCOME (LOSS):</b>	<b>157,238</b>	<b>(499,646)</b>	<b>17,256</b>	<b>139,983</b>	<b>11%</b>	<b>(139,983)</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>DESKBOOKS</b>						
<b>REVENUE:</b>						
DESKBOOK SALES	82,000	-	20,218	61,782	25%	(61,782)
LEXIS/NEXIS ROYALTIES	31,600	14,409	63,653	(32,053)	201%	32,053
SECTION PUBLICATION SALES	6,000	-	1,863	4,137	31%	(4,137)
CASEMAKER ROYALTIES	45,000	5,190	28,934	16,066	64%	(16,066)
<b>TOTAL REVENUE:</b>	<b>164,600</b>	<b>19,599</b>	<b>114,668</b>	<b>49,932</b>	<b>70%</b>	<b>(49,932)</b>
<b>DIRECT EXPENSES:</b>						
COST OF SALES - DESKBOOKS	64,000	5,954	29,719	34,281	46%	34,281
COST OF SALES - SECTION PUBLICATION	1,560	312	2,437	(877)	156%	(877)
SPLITS TO SECTIONS	500	-	356	144	71%	144
DESKBOOK ROYALTIES	200	-	310	(110)	155%	(110)
STAFF CONFRENCES & TRAINING	350	-	-	350	0%	350
ONLINE LEGAL RESEARCH	1,895	326	1,908	(13)	101%	(13)
STAFF MEMBERSHIP DUES	220	-	221	(1)	100%	(1)
<b>TOTAL DIRECT EXPENSES:</b>	<b>68,725</b>	<b>6,592</b>	<b>34,951</b>	<b>33,774</b>	<b>51%</b>	<b>33,774</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.50 FTE)	126,964	10,380	127,561	(596)	100%	(596)
BENEFITS EXPENSE	40,014	4,617	40,522	(508)	101%	(508)
OTHER INDIRECT EXPENSE	44,421	3,267	40,486	3,936	91%	3,936
<b>TOTAL INDIRECT EXPENSES:</b>	<b>211,400</b>	<b>18,264</b>	<b>208,568</b>	<b>2,831</b>	<b>99%</b>	<b>2,831</b>
<b>TOTAL ALL EXPENSES:</b>	<b>280,125</b>	<b>24,857</b>	<b>243,519</b>	<b>36,605</b>	<b>87%</b>	<b>36,605</b>
<b>NET INCOME (LOSS):</b>	<b>(115,525)</b>	<b>(5,258)</b>	<b>(128,851)</b>	<b>13,327</b>	<b>112%</b>	<b>(13,327)</b>



## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>DISCIPLINE</b>						
<b>REVENUE:</b>						
COPY FEES	36	-	36	-	100%	-
AUDIT REVENUE	1,000	-	893	108	89%	(108)
RECOVERY OF DISCIPLINE COSTS	100,000	130	85,405	14,595	85%	(14,595)
DISCIPLINE HISTORY SUMMARY	17,000	1,738	19,433	(2,433)	114%	2,433
PRACTICE MONITOR FEES	4,000	-	-	4,000	0%	(4,000)
<b>TOTAL REVENUE:</b>	<b>122,036</b>	<b>1,868</b>	<b>105,767</b>	<b>16,269</b>	<b>87%</b>	<b>(16,269)</b>
<b>DIRECT EXPENSES:</b>						
PUBLICATIONS PRODUCTION	181	-	-	181	0%	181
STAFF TRAVEL/PARKING	20,000	594	13,222	6,778	66%	6,778
STAFF MEMBERSHIP DUES	8,205	-	6,100	2,105	74%	2,105
TELEPHONE	2,359	316	2,721	(362)	115%	(362)
COURT REPORTERS	45,000	10,271	46,457	(1,457)	103%	(1,457)
OUTSIDE COUNSEL/AIC	1,500	-	-	1,500	0%	1,500
LITIGATION EXPENSES	25,000	2,043	13,258	11,742	53%	11,742
DISABILITY EXPENSES	9,000	-	3,500	5,500	39%	5,500
ONLINE LEGAL RESEARCH	55,201	9,470	55,493	(292)	101%	(292)
LAW LIBRARY	3,606	47	5,453	(1,847)	151%	(1,847)
TRANSLATION SERVICES	900	-	512	388	57%	388
STAFF CONFERENCE & TRAINING	38,972	5,530	19,171	19,801	49%	19,801
PRACTICE MONITOR EXPENSE	4,000	-	-	4,000	0%	4,000
<b>TOTAL DIRECT EXPENSES:</b>	<b>213,924</b>	<b>28,271</b>	<b>165,886</b>	<b>48,038</b>	<b>78%</b>	<b>48,038</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (37.00 FTE)	3,565,319	282,473	3,496,048	69,270	98%	69,270
BENEFITS EXPENSE	1,078,046	124,955	1,090,771	(12,725)	101%	(12,725)
OTHER INDIRECT EXPENSE	1,022,297	79,967	990,943	31,354	97%	31,354
<b>TOTAL INDIRECT EXPENSES:</b>	<b>5,665,662</b>	<b>487,395</b>	<b>5,577,763</b>	<b>87,900</b>	<b>98%</b>	<b>87,900</b>
<b>TOTAL ALL EXPENSES:</b>	<b>5,879,586</b>	<b>515,666</b>	<b>5,743,648</b>	<b>135,937</b>	<b>98%</b>	<b>135,937</b>
<b>NET INCOME (LOSS):</b>	<b>(5,757,549)</b>	<b>(513,798)</b>	<b>(5,637,881)</b>	<b>(119,668)</b>	<b>98%</b>	<b>119,668</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>DIVERSITY</b>						
<b>REVENUE:</b>						
DONATIONS	135,000	-	135,000	-	100%	-
<b>TOTAL REVENUE:</b>	<b>135,000</b>	<b>-</b>	<b>135,000</b>	<b>-</b>	<b>100%</b>	<b>-</b>
<b>DIRECT EXPENSES:</b>						
STAFF TRAVEL/PARKING	4,000	-	541	3,459	14%	3,459
STAFF MEMBERSHIP DUES	45	-	45	-	100%	-
COMMITTEE FOR DIVERSITY	6,000	575	1,093	4,907	18%	4,907
DIVERSITY EVENTS & PROJECTS	18,000	1,426	9,204	8,796	51%	8,796
SURVEYS	50,100	-	5,000	45,100	10%	45,100
STAFF CONFERENCE & TRAINING	5,400	-	1,663	3,737	31%	3,737
CONSULTING SERVICES	71,175	11,025	25,722	45,453	36%	45,453
TELEPHONE	-	60	60	(60)		(60)
<b>TOTAL DIRECT EXPENSE:</b>	<b>154,720</b>	<b>13,086</b>	<b>43,328</b>	<b>111,392</b>	<b>28%</b>	<b>111,392</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (2.40 FTE)	158,781	7,726	155,618	3,163	98%	3,163
BENEFITS EXPENSE	51,456	5,947	52,631	(1,175)	102%	(1,175)
OTHER INDIRECT EXPENSE	67,463	5,221	64,701	2,762	96%	2,762
<b>TOTAL INDIRECT EXPENSES:</b>	<b>277,700</b>	<b>18,894</b>	<b>272,950</b>	<b>4,750</b>	<b>98%</b>	<b>4,750</b>
<b>TOTAL ALL EXPENSES:</b>	<b>432,420</b>	<b>31,980</b>	<b>316,278</b>	<b>116,142</b>	<b>73%</b>	<b>116,142</b>
<b>NET INCOME (LOSS):</b>	<b>(297,420)</b>	<b>(31,980)</b>	<b>(181,278)</b>	<b>(116,142)</b>	<b>61%</b>	<b>116,142</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>EJD FTE</b>						
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.01 FTE)	142,862	11,672	142,530	332	100%	332
BENEFITS EXPENSE	38,733	4,415	40,287	(1,554)	104%	(1,554)
OTHER INDIRECT EXPENSE	9,988	2,198	27,243	(17,255)	273%	(17,255)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>191,583</b>	<b>18,286</b>	<b>210,059</b>	<b>(18,476)</b>	<b>110%</b>	<b>(18,476)</b>
<b>NET INCOME (LOSS):</b>	<b>(191,583)</b>	<b>(18,286)</b>	<b>(210,059)</b>	<b>18,476</b>	<b>110%</b>	<b>(18,476)</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>FOUNDATION</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
CONSULTING SERVICES	3,000	3,000	3,000	-	100%	-
PRINTING & COPYING	450	-	-	450	0%	450
STAFF TRAVEL/PARKING	600	-	337	263	56%	263
SUPPLIES	150	-	75	75	50%	75
BOARD OF TRUSTEES	1,590	219	809	781	51%	781
POSTAGE	300	-	-	300	0%	300
<b>TOTAL DIRECT EXPENSES:</b>	<b>6,090</b>	<b>3,219</b>	<b>4,221</b>	<b>1,869</b>	<b>69%</b>	<b>1,869</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.00 FTE)	81,654	7,004	81,103	551	99%	551
BENEFITS EXPENSE	15,111	1,360	15,473	(362)	102%	(362)
OTHER INDIRECT EXPENSE	29,576	2,168	26,864	2,711	91%	2,711
<b>TOTAL INDIRECT EXPENSES:</b>	<b>126,340</b>	<b>10,533</b>	<b>123,441</b>	<b>2,899</b>	<b>98%</b>	<b>2,899</b>
<b>TOTAL ALL EXPENSES:</b>	<b>132,430</b>	<b>13,752</b>	<b>127,662</b>	<b>4,768</b>	<b>96%</b>	<b>4,768</b>
<b>NET INCOME (LOSS):</b>	<b>(132,430)</b>	<b>(13,752)</b>	<b>(127,662)</b>	<b>(4,768)</b>	<b>96%</b>	<b>4,768</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>HUMAN RESOURCES</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
STAFF TRAVEL/PARKING	1,000	-	419	581	42%	581
STAFF MEMBERSHIP DUES	1,000	-	219	781	22%	781
SUBSCRIPTIONS	2,500	-	423.36	2,077	17%	2,077
STAFF TRAINING- GENERAL	20,000	-	3,826	16,175	19%	16,175
RECRUITING AND ADVERTISING	5,000	429	6,178	(1,178)	124%	(1,178)
PAYROLL PROCESSING	52,538	5,438	50,075	2,463	95%	2,463
SALARY SURVEYS	2,000	-	-	2,000	0%	2,000
CONSULTING SERVICES	15,000	-	14,285	715	95%	715
CONFERENCE CALLS	20	-	-	20	0%	20
TRANSFER TO INDIRECT EXPENSE	(99,058)	(5,867)	(75,425)	(23,632)	76%	(23,632)
<b>TOTAL DIRECT EXPENSES:</b>	-	-	-	-		-
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (3.00 FTE)	276,969	33,537	295,990	(19,022)	107%	(19,022)
BENEFITS EXPENSE	98,910	12,609	104,383	(5,474)	106%	(5,474)
OTHER INDIRECT EXPENSE	84,067	6,534	80,971	3,095	96%	3,095
<b>TOTAL INDIRECT EXPENSES:</b>	<b>459,945</b>	<b>52,680</b>	<b>481,345</b>	<b>(21,400)</b>	<b>105%</b>	<b>(21,400)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>459,945</b>	<b>52,680</b>	<b>481,345</b>	<b>(21,400)</b>	<b>105%</b>	<b>(21,400)</b>
<b>NET INCOME (LOSS):</b>	<b>(459,945)</b>	<b>(52,680)</b>	<b>(481,345)</b>	<b>21,400</b>	<b>105%</b>	<b>(21,400)</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>LEGISLATIVE</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
STAFF TRAVEL/PARKING	3,133	-	188	2,946	6%	2,946
STAFF MEMBERSHIP DUES	450	-	130	320	29%	320
JUD RECOMMEND COMMITTEE	4,500	-	-	4,500	0%	4,500
SUBSCRIPTIONS	2,000	-	1,985	16	99%	16
CONTRACT LOBBYIST	10,000	-	10,000	-	100%	-
LEGISLATIVE COMMITTEE	2,500	-	9	2,491	0%	2,491
BOG LEGISLATIVE COMMITTEE	300	-	-	300	0%	300
STAFF CONFERENCE & TRAINING	2,000	-	-	2,000	0%	2,000
<b>TOTAL DIRECT EXPENSES:</b>	<b>24,883</b>	<b>-</b>	<b>12,311</b>	<b>12,572</b>	<b>49%</b>	<b>12,572</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.70 FTE)	133,430	3,799	115,007	18,424	86%	18,424
BENEFITS EXPENSE	44,484	6,433	52,819	(8,335)	119%	(8,335)
OTHER INDIRECT EXPENSE	50,313	3,695	45,783	4,530	91%	4,530
<b>TOTAL INDIRECT EXPENSES:</b>	<b>228,227</b>	<b>13,927</b>	<b>213,608</b>	<b>14,619</b>	<b>94%</b>	<b>14,619</b>
<b>TOTAL ALL EXPENSES:</b>	<b>253,110</b>	<b>13,927</b>	<b>225,920</b>	<b>27,191</b>	<b>89%</b>	<b>27,191</b>
<b>NET INCOME (LOSS):</b>	<b>(253,110)</b>	<b>(13,927)</b>	<b>(225,920)</b>	<b>(27,191)</b>	<b>89%</b>	<b>27,191</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>LICENSING &amp; MEMBERSHIP RECORDS</b>						
<b>REVENUE:</b>						
STATUS CERTIFICATE FEES	24,061	2,350	29,548	(5,487)	123%	5,487
INVESTIGATION FEES	21,759	1,800	22,300	(541)	102%	541
PRO HAC VICE	362,311	30,228	400,282	(37,971)	110%	37,971
MEMBER CONTACT INFORMATION	3,125	391	3,325	(200)	106%	200
PHOTO BAR CARD SALES	247	60	240	7	97%	(7)
<b>TOTAL REVENUE:</b>	<b>411,503</b>	<b>34,829</b>	<b>455,695</b>	<b>(44,192)</b>	<b>111%</b>	<b>44,192</b>
<b>DIRECT EXPENSES:</b>						
DEPRECIATION	0	-	-	0	0%	0
POSTAGE	22,641	-	24,352	(1,711)	108%	(1,711)
LICENSING FORMS	1,977	-	915	1,062	46%	1,062
<b>TOTAL DIRECT EXPENSES:</b>	<b>24,619</b>	<b>-</b>	<b>25,267</b>	<b>(648)</b>	<b>103%</b>	<b>(648)</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (3.83 FTE)	367,234	30,165	365,027	2,207	99%	2,207
BENEFITS EXPENSE	118,907	13,790	118,663	244	100%	244
OTHER INDIRECT EXPENSE	113,292	8,336	103,296	9,997	91%	9,997
<b>TOTAL INDIRECT EXPENSES:</b>	<b>599,433</b>	<b>52,291</b>	<b>586,985</b>	<b>12,448</b>	<b>98%</b>	<b>12,448</b>
<b>TOTAL ALL EXPENSES:</b>	<b>624,052</b>	<b>52,291</b>	<b>612,252</b>	<b>11,800</b>	<b>98%</b>	<b>11,800</b>
<b>NET INCOME (LOSS):</b>	<b>(212,549)</b>	<b>(17,462)</b>	<b>(156,557)</b>	<b>(55,992)</b>	<b>74%</b>	<b>55,992</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>LEGAL LUNCHBOX</b>						
<b>REVENUE:</b>						
SPONSORSHIPS	9,000	-	9,000	-	100%	-
MP3 SALES	8,000	-	7,056	944	88%	(944)
DIGITAL VIDEO SALES	25,000	1,274	30,233	(5,233)	121%	5,233
<b>TOTAL REVENUE:</b>	<b>42,000</b>	<b>1,274</b>	<b>46,289</b>	<b>(4,289)</b>	<b>110%</b>	<b>4,289</b>
<b>DIRECT EXPENSES:</b>						
SPEAKERS & DEVELOPMENT	100	-	-	100	0%	100
<b>TOTAL DIRECT EXPENSES:</b>	<b>100</b>	<b>-</b>	<b>-</b>	<b>100</b>	<b>0%</b>	<b>100</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (0.43 FTE)	26,359	2,130	23,122	3,237	88%	3,237
BENEFITS EXPENSE	9,207	1,225	10,257	(1,051)	111%	(1,051)
OTHER INDIRECT EXPENSE	12,571	918	11,363	1,208	90%	1,208
<b>TOTAL INDIRECT EXPENSES:</b>	<b>48,136</b>	<b>4,273</b>	<b>44,742</b>	<b>3,394</b>	<b>93%</b>	<b>3,394</b>
<b>TOTAL ALL EXPENSES:</b>	<b>48,236</b>	<b>4,273</b>	<b>44,742</b>	<b>3,494</b>	<b>93%</b>	<b>3,494</b>
<b>NET INCOME (LOSS):</b>	<b>(6,236)</b>	<b>(2,999)</b>	<b>1,547</b>	<b>(7,783)</b>	<b>-25%</b>	<b>7,783</b>



## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>LIMITED LICENSE LEGAL TECHNICIAN PROGRAM</b>						
<b>REVENUE:</b>						
LLLT LICENSE FEES	12,634	996	13,542	(908)	107%	908
LLLT LATE LICENSE FEES	1,000	-	99	901	10%	(901)
LLLT EXAM FEES	3,850	-	5,400	(1,550)	140%	1,550
<b>TOTAL REVENUE:</b>	<b>17,484</b>	<b>996</b>	<b>19,041</b>	<b>(1,557)</b>	<b>109%</b>	<b>1,557</b>
<b>DIRECT EXPENSES:</b>						
LLLT BOARD	15,449	381	5,333	10,116	35%	10,116
LLLT EXAM WRITING	4,500	-	9,000	(4,500)	200%	(4,500)
<b>TOTAL DIRECT EXPENSES:</b>	<b>19,949</b>	<b>381</b>	<b>14,333</b>	<b>5,616</b>	<b>72%</b>	<b>5,616</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (0.48 FTE)	38,082	3,528	44,015	(5,933)	116%	(5,933)
BENEFITS EXPENSE	13,219	1,692	14,235	(1,016)	108%	(1,016)
OTHER INDIRECT EXPENSE	12,286	1,038	12,865	(578)	105%	(578)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>63,587</b>	<b>6,257</b>	<b>71,114</b>	<b>(7,527)</b>	<b>112%</b>	<b>(7,527)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>83,536</b>	<b>6,639</b>	<b>85,447</b>	<b>(1,911)</b>	<b>102%</b>	<b>(1,911)</b>
<b>NET INCOME (LOSS):</b>	<b>(66,052)</b>	<b>(5,643)</b>	<b>(66,406)</b>	<b>(1,911)</b>	<b>101%</b>	<b>(354)</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>LIMITED PRACTICE OFFICERS</b>						
<b>REVENUE:</b>						
INVESTIGATION FEES	400	200	500	(100)	125%	100
MEMBER LATE FEES	1,200	-	8,700	(7,500)	725%	7,500
LPO EXAMINATION FEES	33,850	6,000	36,950	(3,100)	109%	3,100
LPO LICENSE FEES	172,579	14,409	170,168	2,411	99%	(2,411)
LPO LATE LICENSE FEES	5,100	-	2,820	2,280	55%	(2,280)
LPO LICENSE FEES - REINSTATES	667	-	230	437	34%	(437)
<b>TOTAL REVENUE:</b>	<b>213,795</b>	<b>20,609</b>	<b>219,368</b>	<b>(5,573)</b>	<b>103%</b>	<b>5,573</b>
<b>DIRECT EXPENSES:</b>						
FACILITY, PARKING, FOOD	9,000	4,568	4,568	4,432	51%	4,432
EXAM WRITING	8,400	4,200	7,663	738	91%	738
ONLINE LEGAL RESEARCH	2,156	326	1,908	247	89%	247
LAW LIBRARY	4,701	282	3,368	1,333	72%	1,333
LPO BOARD	2,000	-	-	2,000	0%	2,000
LPO OUTREACH	3,333	-	-	3,333	0%	3,333
PRINTING & COPYING	100	-	123	(23)	123%	(23)
SUPPLIES	-	-	72	(72)		(72)
<b>TOTAL DIRECT EXPENSES:</b>	<b>29,690</b>	<b>9,376</b>	<b>17,702</b>	<b>11,988</b>	<b>60%</b>	<b>11,988</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (0.68 FTE)	49,492	4,542	59,420	(9,928)	120%	(9,928)
BENEFITS EXPENSE	17,559	2,373	19,766	(2,207)	113%	(2,207)
OTHER INDIRECT EXPENSE	17,747	1,588	19,675	(1,928)	111%	(1,928)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>84,798</b>	<b>8,504</b>	<b>98,861</b>	<b>(14,063)</b>	<b>117%</b>	<b>(14,063)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>114,489</b>	<b>17,879</b>	<b>116,563</b>	<b>(2,075)</b>	<b>102%</b>	<b>(2,075)</b>
<b>NET INCOME (LOSS):</b>	<b>99,307</b>	<b>2,730</b>	<b>102,805</b>	<b>(3,498)</b>	<b>104%</b>	<b>3,498</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>MANDATORY CONTINUING LEGAL EDUCATION</b>						
<b>REVENUE:</b>						
ACCREDITED PROGRAM FEES	566,556	50,600	615,700	(49,144)	109%	49,144
FORM 1 LATE FEES	220,000	17,100	226,200	(6,200)	103%	6,200
MEMBER LATE FEES	400,000	(150)	422,350	(22,350)	106%	22,350
ANNUAL ACCREDITED SPONSOR FEES	39,250	-	34,500	4,750	88%	(4,750)
ATTENDANCE LATE FEES	115,000	8,350	119,450	(4,450)	104%	4,450
COMITY CERTIFICATES	42,000	275	46,150	(4,150)	110%	4,150
<b>TOTAL REVENUE:</b>	<b>1,382,807</b>	<b>76,175</b>	<b>1,464,350</b>	<b>(81,544)</b>	<b>106%</b>	<b>81,544</b>
<b>DIRECT EXPENSES:</b>						
DEPRECIATION	22,747	1,681	24,455	(1,709)	108%	(1,709)
STAFF MEMBERSHIP DUES	500	-	500	-	100%	-
ONLINE LEGAL RESEARCH	2,114	326	1,908	205	90%	205
LAW LIBRARY	182	12	138	44	76%	44
MCLE BOARD	1,300	-	-	1,300	0%	1,300
STAFF TRAVEL/PARKING	50	-	-	50	0%	50
STAFF CONFERENCE & TRAINING	6,550	-	100	6,450	2%	6,450
<b>TOTAL DIRECT EXPENSES:</b>	<b>33,442</b>	<b>2,018</b>	<b>27,102</b>	<b>6,340</b>	<b>81%</b>	<b>6,340</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (4.88 FTE)	391,608	29,142	409,522	(17,914)	105%	(17,914)
BENEFITS EXPENSE	118,897	14,142	118,014	883	99%	883
OTHER INDIRECT EXPENSE	144,282	10,597	131,306	12,976	91%	12,976
<b>TOTAL INDIRECT EXPENSES:</b>	<b>654,787</b>	<b>53,882</b>	<b>658,842</b>	<b>(4,054)</b>	<b>101%</b>	<b>(4,054)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>688,230</b>	<b>55,900</b>	<b>685,944</b>	<b>2,286</b>	<b>100%</b>	<b>2,286</b>
<b>NET INCOME (LOSS):</b>	<b>694,577</b>	<b>20,275</b>	<b>778,406</b>	<b>(83,829)</b>	<b>112%</b>	<b>83,829</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>MINI CLE</b>						
INDIRECT EXPENSES:	59,743	5,003	52,466	7,277	88%	59,723
SALARY EXPENSE (0.91 FTE)	20,010	2,645	22,322	(2,312)	112%	(2,312)
BENEFITS EXPENSE	26,959	1,985	24,594	2,365	91%	2,365
OTHER INDIRECT EXPENSE						
<b>TOTAL INDIRECT EXPENSES:</b>	<b>106,712</b>	<b>9,633</b>	<b>99,382</b>	<b>7,330</b>	<b>93%</b>	<b>59,776</b>
<b>NET INCOME (LOSS):</b>	<b>(106,712)</b>	<b>(9,633)</b>	<b>(99,382)</b>	<b>(7,330)</b>	<b>93%</b>	<b>7,330</b>

**Washington State Bar Association**  
Statement of Activities  
For the Period from September 1, 2022 to September 30, 2022  
**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>MEMBER SERVICES &amp; ENGAGEMENT</b>						
<b>REVENUE:</b>						
ROYALTIES	20,000	(60,671)	13,200	6,800	66%	(6,800)
<b>TOTAL REVENUE:</b>	<b>20,000</b>	<b>(60,671)</b>	<b>13,200</b>	<b>6,800</b>	<b>66%</b>	<b>(6,800)</b>
<b>DIRECT EXPENSES:</b>						
STAFF TRAVEL/PARKING	1,000	-	206	794	21%	794
STAFF CONFERENCE & TRAINING	400	-	-	400	0%	400
SMALL TOWN AND RURAL COMMITTEE	2,000	-	-	2,000	0%	2,000
YLL SECTION PROGRAM	1,500	550	550	950	37%	950
WYLC CLE COMPS	-	-	159	(159)		(159)
WYLC OUTREACH EVENTS	1,500	-	891	609	59%	609
WYL COMMITTEE	7,500	1,255	2,003	5,497	27%	5,497
RECEPTION/FORUM EXPENSE	1,500	77	95	1,405	6%	1,405
WYLC SCHOLARSHIPS/DONATIONS/GRANT	5,000	-	-	5,000	0%	5,000
STAFF MEMBERSHIP DUES	850	-	649	201	76%	201
LENDING LIBRARY	2,000	10	1,712	288	86%	288
<b>TOTAL DIRECT EXPENSES:</b>	<b>23,250</b>	<b>1,892</b>	<b>6,265</b>	<b>16,985</b>	<b>27%</b>	<b>16,985</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (3.46 FTE)	235,010	18,996	232,972	2,037	99%	2,037
BENEFITS EXPENSE	79,024	8,590	76,065	2,959	96%	2,959
OTHER INDIRECT EXPENSE	102,285	7,511	93,079	9,206	91%	9,206
<b>TOTAL INDIRECT EXPENSES:</b>	<b>416,320</b>	<b>35,097</b>	<b>402,117</b>	<b>14,202</b>	<b>97%</b>	<b>14,202</b>
<b>TOTAL ALL EXPENSES:</b>	<b>439,570</b>	<b>36,989</b>	<b>408,382</b>	<b>31,188</b>	<b>93%</b>	<b>31,188</b>
<b>NET INCOME (LOSS):</b>	<b>(419,570)</b>	<b>(97,661)</b>	<b>(395,182)</b>	<b>(24,388)</b>	<b>94%</b>	<b>24,388</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>MEMBER SERVICES &amp; ENGAGEMENT (COMBINED)</b>						
<b>REVENUE:</b>						
ROYALTIES	20,000	(60,671)	13,200	6,800	66%	(6,800)
NMP PRODUCT SALES	60,000	474	39,844	20,156	66%	(20,156)
MP3 SALES	8,000	-	7,056	944	88%	(944)
DIGITAL VIDEO SALES	25,000	1,274	30,233	(5,233)	121%	5,233
SPONSORSHIPS	9,000	-	9,000	-	100%	-
SEMINAR REGISTRATIONS	16,500	-	-	16,500	0%	(16,500)
TRIAL ADVOCACY PROGRAM	15,000	6,071	6,071	8,929	40%	(8,929)
<b>TOTAL REVENUE:</b>	<b>153,500</b>	<b>(52,852)</b>	<b>105,404</b>	<b>48,096</b>	<b>69%</b>	<b>(48,096)</b>
<b>DIRECT EXPENSES:</b>						
STAFF TRAVEL/PARKING	1,000	-	206	794	21%	794
STAFF CONFERENCE & TRAINING	400	-	-	400	0%	400
SMALL TOWN AND RURAL COMMITTEE	2,000	-	-	2,000	0%	2,000
YLL SECTION PROGRAM	1,500	550	550	950	37%	950
WYLC CLE COMPS	-	-	159	(159)		(159)
WYLC OUTREACH EVENTS	1,500	-	891	609	59%	609
SPEAKERS & PROGRAM DEVELOP	100	-	-	100	0%	100
WYL COMMITTEE	7,500	1,255	2,003	5,497	27%	5,497
TRIAL ADVOCACY EXPENSES	1,500	-	-	1,500	0%	1,500
RECEPTION/FORUM EXPENSE	1,500	77	95	1,405	6%	1,405
WYLC SCHOLARSHIPS/DONATIONS/GRANT	5,000	-	-	5,000	0%	5,000
STAFF MEMBERSHIP DUES	850	-	649	201	76%	201
LENDING LIBRARY	2,000	10	1,712	288	86%	288
NMP SPEAKERS & PROGRAM DEVELOPMENT	500	-	-	500	0%	500
<b>TOTAL DIRECT EXPENSES:</b>	<b>25,350</b>	<b>1,892</b>	<b>6,265</b>	<b>19,085</b>	<b>25%</b>	<b>19,085</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (5.57 FTE)	371,951	30,397	354,804	17,146	95%	17,146
BENEFITS EXPENSE	124,317	14,617	126,984	(2,667)	102%	(2,667)
OTHER INDIRECT EXPENSE	164,956	12,124	150,225	14,731	91%	14,731
<b>TOTAL INDIRECT EXPENSES:</b>	<b>661,224</b>	<b>57,138</b>	<b>632,013</b>	<b>29,210</b>	<b>96%</b>	<b>29,210</b>
<b>TOTAL ALL EXPENSES:</b>	<b>686,574</b>	<b>59,030</b>	<b>638,278</b>	<b>48,296</b>	<b>93%</b>	<b>48,296</b>
<b>NET INCOME (LOSS):</b>	<b>(533,074)</b>	<b>(111,882)</b>	<b>(532,874)</b>	<b>(200)</b>	<b>100%</b>	<b>200</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>MEMBER WELLNESS PROGRAM</b>						
<b>REVENUE:</b>						
DIVERSIONS	7,292	1,125	9,375	(2,083)	129%	2,083
<b>TOTAL REVENUE:</b>	<b>7,292</b>	<b>1,125</b>	<b>9,375</b>	<b>(2,083)</b>	<b>129%</b>	<b>2,083</b>
<b>DIRECT EXPENSES:</b>						
STAFF MEMBERSHIP DUES	333	-	226	107	68%	107
PROF LIAB INSURANCE	4,467	-	825	3,642	18%	3,642
WSBA CONNECTS	8,777	-	8,110	667	92%	667
MEMBER WELLNESS COUNCIL	500	-	-	500	0%	500
STAFF CONFERENCE & TRAINING	165	-	165	-	100%	-
SUBSCRIPTIONS	300	100	1,100	(800)	367%	(800)
<b>TOTAL DIRECT EXPENSES:</b>	<b>14,542</b>	<b>100</b>	<b>10,426</b>	<b>4,116</b>	<b>72%</b>	<b>4,116</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.48 FTE)	109,506	5,661	84,689	24,817	77%	24,817
BENEFITS EXPENSE	47,287	6,462	51,826	(4,540)	110%	(4,540)
OTHER INDIRECT EXPENSE	37,399	3,206	39,729	(2,330)	106%	(2,330)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>194,191</b>	<b>15,329</b>	<b>176,244</b>	<b>17,948</b>	<b>91%</b>	<b>17,948</b>
<b>TOTAL ALL EXPENSES:</b>	<b>208,733</b>	<b>15,429</b>	<b>186,670</b>	<b>22,063</b>	<b>89%</b>	<b>22,063</b>
<b>NET INCOME (LOSS):</b>	<b>(201,441)</b>	<b>(14,304)</b>	<b>(177,295)</b>	<b>(24,147)</b>	<b>88%</b>	<b>24,147</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>NEW MEMBER EDUCATION</b>						
<b>REVENUE:</b>						
NMP PRODUCT SALES	60,000	474	39,844	20,156	66%	(20,156)
SEMINAR REGISTRATIONS	16,500	-	-	16,500	0%	(16,500)
TRIAL ADVOCACY PROGRAM	15,000	6,071	6,071	8,929	40%	(8,929)
<b>TOTAL REVENUE:</b>	<b>91,500</b>	<b>6,545</b>	<b>45,915</b>	<b>45,585</b>	<b>50%</b>	<b>(45,585)</b>
<b>DIRECT EXPENSES:</b>						
TRIAL ADVOCACY EXPENSES	1,500	-	-	1,500	0%	1,500
SPEAKERS & PROGRAM DEVELOPMENT	500	-	-	500	0%	500
<b>TOTAL DIRECT EXPENSES:</b>	<b>2,000</b>	<b>-</b>	<b>-</b>	<b>2,000</b>	<b>0%</b>	<b>2,000</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (0.78 FTE)	50,838	4,268	46,244	4,594	91%	4,594
BENEFITS EXPENSE	16,076	2,157	18,340	(2,263)	114%	(2,263)
OTHER INDIRECT EXPENSE	23,141	1,710	21,189	1,952	92%	1,952
<b>TOTAL INDIRECT EXPENSES:</b>	<b>90,056</b>	<b>8,135</b>	<b>85,773</b>	<b>4,283</b>	<b>95%</b>	<b>4,283</b>
<b>TOTAL ALL EXPENSES:</b>	<b>92,056</b>	<b>8,135</b>	<b>85,773</b>	<b>6,283</b>	<b>93%</b>	<b>6,283</b>
<b>NET INCOME (LOSS):</b>	<b>(556)</b>	<b>(1,590)</b>	<b>(39,858)</b>	<b>39,302</b>	<b>7169%</b>	<b>(39,302)</b>



## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>OFFICE OF THE EXECUTIVE DIRECTOR</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
LEADERSHIP TRAINING	20,000	-	-	20,000	0%	20,000
WASHINGTON LEADERSHIP INSTITUTE	44,764	-	44,764	-	100%	-
ED TRAVEL & OUTREACH	5,601	258	1,529	4,072	27%	4,072
LAW LIBRARY	46	12	138	(93)	302%	(93)
STAFF TRAVEL/PARKING	1,351	42	628	724	46%	724
STAFF CONFERENCE & TRAINING	4,383	254	4,564	(181)	104%	(181)
STAFF MEMBERSHIP DUES	786	-	1,346	(560)	171%	(560)
SURVEY	-	-	331	(331)		(331)
<b>TOTAL DIRECT EXPENSES:</b>	<b>76,932</b>	<b>566</b>	<b>53,301</b>	<b>23,631</b>	<b>69%</b>	<b>23,631</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (2.00 FTE)	366,662	19,403	314,330	52,332	86%	52,332
BENEFITS EXPENSE	93,186	9,242	89,784	3,402	96%	3,402
OTHER INDIRECT EXPENSE	59,267	4,365	54,095	5,172	91%	5,172
<b>TOTAL INDIRECT EXPENSES:</b>	<b>519,115</b>	<b>33,010</b>	<b>458,209</b>	<b>60,906</b>	<b>88%</b>	<b>60,906</b>
<b>TOTAL ALL EXPENSES:</b>	<b>596,047</b>	<b>33,575</b>	<b>511,510</b>	<b>84,537</b>	<b>86%</b>	<b>84,537</b>
<b>NET INCOME (LOSS):</b>	<b>(596,047)</b>	<b>(33,575)</b>	<b>(511,510)</b>	<b>84,537</b>	<b>86%</b>	<b>84,537</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>OFFICE OF GENERAL COUNSEL</b>						
<b>REVENUE:</b>						
RECORDS REQUEST FEES	3	-	1,126	(1,123)	35738%	1,123
<b>TOTAL REVENUE:</b>	<b>3</b>	<b>-</b>	<b>1,126</b>	<b>(1,123)</b>	<b>35738%</b>	<b>1,123</b>
<b>DIRECT EXPENSES:</b>						
STAFF TRAVEL/PARKING	741	-	262	479	35%	479
STAFF MEMBERSHIP DUES	254	-	254	-	100%	-
ONLINE LEGAL RESEARCH	10,400	1,954	11,450	(1,049)	110%	(1,049)
LAW LIBRARY	2,731	23	1,878	853	69%	853
COURT RULES COMMITTEE	100	-	0	100	0%	100
CUSTODIANSHIPS	8,150	89	245	7,905	3%	7,905
LITIGATION EXPENSES	200	125	146	54	73%	54
DISABILITY ACCOMMODATIONS	-	455	455	(455)		(455)
STAFF CONFERENCE & TRAINING	5,495	-	1,687	3,808	31%	3,808
<b>TOTAL DIRECT EXPENSES:</b>	<b>28,071</b>	<b>2,646</b>	<b>16,377</b>	<b>11,695</b>	<b>58%</b>	<b>11,695</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (5.77 FTE)	601,897	49,350	610,191	(8,294)	101%	(8,294)
BENEFITS EXPENSE	175,968	21,108	184,318	(8,349)	105%	(8,349)
OTHER INDIRECT EXPENSE	173,376	13,252	164,213	9,162	95%	9,162
<b>TOTAL INDIRECT EXPENSES:</b>	<b>951,241</b>	<b>83,709</b>	<b>958,722</b>	<b>(7,481)</b>	<b>101%</b>	<b>(7,481)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>979,313</b>	<b>86,355</b>	<b>975,098</b>	<b>4,214</b>	<b>100%</b>	<b>4,214</b>
<b>NET INCOME (LOSS):</b>	<b>(979,310)</b>	<b>(86,355)</b>	<b>(973,973)</b>	<b>(5,337)</b>	<b>99%</b>	<b>5,337</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>PRACTICE OF LAW BOARD</b>						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
PRACTICE OF LAW BOARD	12,000	-	-	12,000	0%	12,000
<b>TOTAL DIRECT EXPENSES:</b>	<b>12,000</b>	<b>-</b>	<b>-</b>	<b>12,000</b>	<b>0%</b>	<b>12,000</b>
INDIRECT EXPENSES:						
SALARY EXPENSE (0.40 FTE)	43,409	3,492	45,270	(1,861)	104%	(1,861)
BENEFITS EXPENSE	11,371	1,383	12,250	(879)	108%	(879)
OTHER INDIRECT EXPENSE	12,482	1,038	12,865	(383)	103%	(383)
<b>TOTAL INDIRECT EXPENSES:</b>	<b>67,261</b>	<b>5,914</b>	<b>70,384</b>	<b>(3,123)</b>	<b>105%</b>	<b>(3,123)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>79,261</b>	<b>5,914</b>	<b>70,384</b>	<b>8,877</b>	<b>89%</b>	<b>8,877</b>
<b>NET INCOME (LOSS):</b>	<b>(79,261)</b>	<b>(5,914)</b>	<b>(70,384)</b>	<b>(8,877)</b>	<b>89%</b>	<b>8,877</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>OFFICE OF GENERAL COUNSEL - DISCIPLINARY BOARD</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSE:</b>						
STAFF MEMBERSHIP DUES	100	-	-	100	0%	100
LAW LIBRARY	912	70	836	76	92%	76
DISCIPLINARY BOARD EXPENSES	4,118	-	1	4,117	0%	4,117
CHIEF HEARING OFFICER	33,000	2,500	30,000	3,000	91%	3,000
COURT REPORTERS	-	-	572	(572)		(572)
HEARING OFFICER EXPENSES	33,814	1,560	2,763	31,051	8%	31,051
HEARING OFFICER TRAINING	647	-	-	647	0%	647
OUTSIDE COUNSEL	55,000	4,000	48,000	7,000	87%	7,000
STAFF CONFERENCE & TRAINING	1,000	-	-	1,000	0%	1,000
<b>TOTAL DIRECT EXPENSES:</b>	<b>128,591</b>	<b>8,130</b>	<b>82,171</b>	<b>46,420</b>	<b>64%</b>	<b>46,420</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.30 FTE)	108,311	10,005	109,680	(1,369)	101%	(1,369)
BENEFITS EXPENSE	33,105	3,616	31,616	1,489	96%	1,489
OTHER INDIRECT EXPENSE	38,530	2,840	35,189	3,341	91%	3,341
<b>TOTAL INDIRECT EXPENSES:</b>	<b>179,945</b>	<b>16,460</b>	<b>176,484</b>	<b>3,460</b>	<b>98%</b>	<b>3,460</b>
<b>TOTAL ALL EXPENSES:</b>	<b>308,536</b>	<b>24,590</b>	<b>258,656</b>	<b>49,880</b>	<b>84%</b>	<b>49,880</b>
<b>NET INCOME (LOSS):</b>	<b>(308,536)</b>	<b>(24,590)</b>	<b>(258,656)</b>	<b>(49,880)</b>	<b>84%</b>	<b>49,880</b>

**Washington State Bar Association**  
Statement of Activities  
For the Period from September 1, 2022 to September 30, 2022  
**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>PRACTICE MANAGEMENT ASSISTANCE</b>						
<b>REVENUE:</b>						
ROYALTIES	40,226	61,871	62,097	(21,871)	154%	21,871
<b>TOTAL REVENUE:</b>	<b>40,226</b>	<b>61,871</b>	<b>62,097</b>	<b>(21,871)</b>	<b>154%</b>	<b>21,871</b>
<b>DIRECT EXPENSE:</b>						
STAFF MEMBERSHIP DUES	167	-	-	167	0%	167
SUBSCRIPTIONS	233	-	132	101	57%	101
CASEMAKER/FASTCASE	80,000	2,708	75,064	4,937	94%	4,937
<b>TOTAL DIRECT EXPENSES:</b>	<b>80,400</b>	<b>2,708</b>	<b>75,196</b>	<b>5,204</b>	<b>94%</b>	<b>5,204</b>
<b>INDIRECT EXPENSES:</b>						
<b>TOTAL INDIRECT EXPENSES:</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>		<b>-</b>
<b>TOTAL ALL EXPENSES:</b>	<b>80,400</b>	<b>2,708</b>	<b>75,196</b>	<b>5,204</b>	<b>94%</b>	<b>5,204</b>
<b>NET INCOME (LOSS):</b>	<b>(40,174)</b>	<b>59,163</b>	<b>(13,099)</b>	<b>(27,075)</b>	<b>33%</b>	<b>27,075</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>PROFESSIONAL RESPONSIBILITY PROGRAM</b>						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	2,333	-	211	2,122	9%	2,122
STAFF MEMBERSHIP DUES	161	-	-	161	0%	161
LAW LIBRARY	610	47	559	51	92%	51
CPE COMMITTEE	3,723	-	-	3,723	0%	3,723
<b>TOTAL DIRECT EXPENSES:</b>	<b>6,827</b>	<b>47</b>	<b>770</b>	<b>6,057</b>	<b>11%</b>	<b>6,057</b>
INDIRECT EXPENSES:						
SALARY EXPENSE (1.41 FTE)	171,604	10,064	155,587	16,018	91%	16,018
BENEFITS EXPENSE	58,822	7,016	59,507	(685)	101%	(685)
OTHER INDIRECT EXPENSE	43,211	3,479	43,123	89	100%	89
<b>TOTAL INDIRECT EXPENSES:</b>	<b>273,637</b>	<b>20,559</b>	<b>258,216</b>	<b>15,421</b>	<b>94%</b>	<b>15,421</b>
<b>TOTAL ALL EXPENSES:</b>	<b>280,465</b>	<b>20,606</b>	<b>258,987</b>	<b>21,478</b>	<b>92%</b>	<b>21,478</b>
<b>NET INCOME (LOSS):</b>	<b>(280,465)</b>	<b>(20,606)</b>	<b>(258,987)</b>	<b>(21,478)</b>	<b>92%</b>	<b>21,478</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>PUBLIC SERVICE PROGRAMS</b>						
<b>REVENUE:</b>						
DONATIONS & GRANTS	130,000	-	130,000	-	100%	-
<b>TOTAL REVENUE:</b>	<b>130,000</b>	<b>-</b>	<b>130,000</b>	<b>-</b>	<b>100%</b>	<b>-</b>
<b>DIRECT EXPENSES:</b>						
DONATIONS/SPONSORSHIPS/GRANTS	250,280	95,233	248,960	1,319	99%	1,319
STAFF TRAVEL/PARKING	2,700	-	188	2,512	7%	2,512
SURVEYS	100	-	-	100	0%	100
PRO BONO & PUBLIC SERVICE COMMITTEE	2,000	-	126	1,874	6%	1,874
STAFF CONFERENCE & TRAINING	1,200	-	-	1,200	0%	1,200
PRO BONO CERTIFICATES	2,000	-	1,655	345	83%	345
<b>TOTAL DIRECT EXPENSES:</b>	<b>258,280</b>	<b>95,233</b>	<b>250,929</b>	<b>7,350</b>	<b>97%</b>	<b>7,350</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (1.30 FTE)	73,591	6,555	79,567	(5,977)	108%	(5,977)
BENEFITS EXPENSE	28,645	4,113	32,783	(4,138)	114%	(4,138)
OTHER INDIRECT EXPENSE	35,839	2,840	35,189	650	98%	650
<b>TOTAL INDIRECT EXPENSES:</b>	<b>138,075</b>	<b>13,508</b>	<b>147,539</b>	<b>(9,464)</b>	<b>107%</b>	<b>(9,464)</b>
<b>TOTAL ALL EXPENSES:</b>	<b>396,355</b>	<b>108,741</b>	<b>398,468</b>	<b>(2,114)</b>	<b>101%</b>	<b>(2,114)</b>
<b>NET INCOME (LOSS):</b>	<b>(266,355)</b>	<b>(108,741)</b>	<b>(268,468)</b>	<b>2,114</b>	<b>101%</b>	<b>(2,114)</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>PUBLICATION &amp; DESIGN SERVICES</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
SUBSCRIPTIONS	200	-	100	100	50%	100
IMAGE LIBRARY	4,100	-	4,100	-	100%	-
<b>TOTAL DIRECT EXPENSES:</b>	<b>4,300</b>	<b>-</b>	<b>4,200</b>	<b>100</b>	<b>98%</b>	<b>100</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (0.89 FTE)	64,048	5,759	64,015	33	100%	33
BENEFITS EXPENSE	18,693	2,146	18,840	(147)	101%	(147)
OTHER INDIRECT EXPENSE	26,300	1,924	23,837	2,463	91%	2,463
<b>TOTAL INDIRECT EXPENSES:</b>	<b>109,040</b>	<b>9,829</b>	<b>106,692</b>	<b>2,348</b>	<b>98%</b>	<b>2,348</b>
<b>TOTAL ALL EXPENSES:</b>	<b>113,340</b>	<b>9,829</b>	<b>110,892</b>	<b>2,448</b>	<b>98%</b>	<b>2,448</b>
<b>NET INCOME (LOSS):</b>	<b>(113,340)</b>	<b>(9,829)</b>	<b>(110,892)</b>	<b>(2,448)</b>	<b>98%</b>	<b>2,448</b>



## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>REGULATORY SERVICES FTE</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
STAFF CONFERENCE & TRAINING	7,500	-	-	7,500	0%	7,500
<b>TOTAL DIRECT EXPENSES:</b>	<b>7,500</b>	<b>-</b>	<b>-</b>	<b>7,500</b>	<b>0%</b>	<b>7,500</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (2.78 FTE)	327,849	25,638	318,261	9,587	97%	9,587
BENEFITS EXPENSE	100,227	11,338	100,039	187	100%	187
OTHER INDIRECT EXPENSE	80,392	6,046	74,918	5,474	93%	5,474
<b>TOTAL INDIRECT EXPENSES:</b>	<b>508,467</b>	<b>43,022</b>	<b>493,218</b>	<b>15,249</b>	<b>97%</b>	<b>15,249</b>
<b>TOTAL ALL EXPENSES:</b>	<b>515,967</b>	<b>43,022</b>	<b>493,218</b>	<b>22,749</b>	<b>96%</b>	<b>22,749</b>
<b>NET INCOME (LOSS):</b>	<b>(515,967)</b>	<b>(43,022)</b>	<b>(493,218)</b>	<b>(22,749)</b>	<b>96%</b>	<b>22,749</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>SERVICE CENTER</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
TRANSLATION SERVICES	8,500	407	6,790	1,710	80%	1,710
STAFF CONFERENCE & TRAINING	2,100	10	46	2,054	2%	2,054
TELEPHONE	-	180	180	(180)		(180)
<b>TOTAL DIRECT EXPENSES:</b>	<b>10,600</b>	<b>597</b>	<b>7,016</b>	<b>3,584</b>	<b>66%</b>	<b>3,584</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (5.71 FTE)	357,171	30,918	359,931	(2,760)	101%	(2,760)
BENEFITS EXPENSE	135,691	16,270	135,002	689	99%	689
OTHER INDIRECT EXPENSE	169,061	12,427	153,997	15,064	91%	15,064
<b>TOTAL INDIRECT EXPENSES:</b>	<b>661,923</b>	<b>59,615</b>	<b>648,930</b>	<b>12,993</b>	<b>98%</b>	<b>12,993</b>
<b>TOTAL ALL EXPENSES:</b>	<b>672,523</b>	<b>60,212</b>	<b>655,946</b>	<b>16,577</b>	<b>98%</b>	<b>16,577</b>
<b>NET INCOME (LOSS):</b>	<b>(672,523)</b>	<b>(60,212)</b>	<b>(655,946)</b>	<b>(16,577)</b>	<b>98%</b>	<b>16,577</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>SECTIONS ADMINISTRATION</b>						
<b>REVENUE:</b>						
REIMBURSEMENTS FROM SECTIONS	284,000	(90,148)	273,426	10,574	96%	(10,574)
<b>TOTAL REVENUE:</b>	<b>284,000</b>	<b>(90,148)</b>	<b>273,426</b>	<b>10,574</b>	<b>96%</b>	<b>(10,574)</b>
<b>DIRECT EXPENSES:</b>						
STAFF TRAVEL/PARKING	1,000	-	209	791	21%	791
SUBSCRIPTIONS	350	-	331	19	95%	19
SECTION/COMMITTEE CHAIR MTGS	500	-	-	500	0%	500
DUES STATEMENTS	4,593	-	4,593	-	100%	-
STAFF CONFERENCE & TRAINING	200	-	-	200	0%	200
STAFF MEMBERSHIP DUES	250	-	-	250	0%	250
<b>TOTAL DIRECT EXPENSES:</b>	<b>6,893</b>	<b>-</b>	<b>5,133</b>	<b>1,760</b>	<b>74%</b>	<b>1,760</b>
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (2.58 FTE)	145,181	9,541	137,704	7,477	95%	7,477
BENEFITS EXPENSE	60,412	7,063	58,748	1,664	97%	1,664
OTHER INDIRECT EXPENSE	76,400	5,618	69,620	6,780	91%	6,780
<b>TOTAL INDIRECT EXPENSES:</b>	<b>281,993</b>	<b>22,223</b>	<b>266,072</b>	<b>15,921</b>	<b>94%</b>	<b>15,921</b>
<b>TOTAL ALL EXPENSES:</b>	<b>288,886</b>	<b>22,223</b>	<b>271,205</b>	<b>17,681</b>	<b>94%</b>	<b>17,681</b>
<b>NET INCOME (LOSS):</b>	<b>(4,886)</b>	<b>(112,371)</b>	<b>2,221</b>	<b>(7,107)</b>	<b>-45%</b>	<b>7,107</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>SECTIONS OPERATIONS</b>						
<b>REVENUE:</b>						
SECTION DUES	439,178	(136,500)	416,055	23,123	95%	(23,123)
SEMINAR PROFIT SHARE	147,494	234,244	396,244	(248,750)	269%	248,750
INTEREST INCOME	910	10,935	10,935	(10,025)	1202%	10,025
PUBLICATIONS REVENUE	4,000	-	1,923	2,077	48%	(2,077)
OTHER	46,070	4,150	38,196	7,874	83%	(7,874)
CLE SECTION SPLITS PROJECTIONS	-	-	(101,660)	101,660		(101,660)
<b>TOTAL REVENUE:</b>	<b>637,652</b>	<b>112,829</b>	<b>761,693</b>	<b>(124,041)</b>	<b>119%</b>	<b>124,041</b>
<b>DIRECT EXPENSES:</b>						
DIRECT EXPENSES OF SECTION ACTIVITIES	612,229	52,169	194,459	417,770	32%	417,770
REIMBURSEMENT TO WSBA FOR INDIRECT EXPENSES	287,423	(90,148)	273,426	13,996	95%	13,996
<b>TOTAL DIRECT EXPENSES:</b>	<b>899,652</b>	<b>(37,979)</b>	<b>467,886</b>	<b>431,766</b>	<b>52%</b>	<b>431,766</b>
<b>NET INCOME (LOSS):</b>	<b>(262,000)</b>	<b>150,808</b>	<b>293,807</b>	<b>(555,806)</b>	<b>-112%</b>	<b>555,806</b>

## Washington State Bar Association

Statement of Activities

For the Period from September 1, 2022 to September 30, 2022

**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>TECHNOLOGY</b>						
<b>REVENUE:</b>						
<b>TOTAL REVENUE:</b>	-	-	-	-		-
<b>DIRECT EXPENSES:</b>						
CONSULTING SERVICES	110,000	13,531	66,944	43,056	61%	43,056
STAFF TRAVEL/PARKING	2,000	56	2,077	(77)	104%	(77)
STAFF MEMBERSHIP DUES	450	-	-	450	0%	450
TELEPHONE	85,000	6,845	81,303	3,697	96%	3,697
COMPUTER HARDWARE	65,000	16,026	67,315	(2,315)	104%	(2,315)
COMPUTER SOFTWARE	200,000	5,501	184,289	15,711	92%	15,711
HARDWARE SERVICE & WARRANTIES	55,000	4,367	49,719	5,281	90%	5,281
SOFTWARE MAINTENANCE & LICENSING	380,000	3,849	375,274	4,726	99%	4,726
COMPUTER SUPPLIES	5,000	-	3,103	1,897	62%	1,897
THIRD PARTY SERVICES	30,000	3,462	22,446	7,554	75%	7,554
STAFF CONFERENCE & TRAINING	10,000	-	-	10,000	0%	10,000
TRANSFER TO INDIRECT EXPENSES	(942,450)	(53,637)	(852,470)	(89,980)	90%	(89,980)
<b>TOTAL DIRECT EXPENSES:</b>	-	-	-	-		-
<b>INDIRECT EXPENSES:</b>						
SALARY EXPENSE (13.00 FTE)	1,428,681	116,788	1,277,147	151,535	89%	151,535
BENEFITS EXPENSE	386,935	44,585	391,726	(4,791)	101%	(4,791)
CAPITAL LABOR & OVERHEAD	(285,000)	(39,771)	(267,632)	(17,368)	94%	17,368
OTHER INDIRECT EXPENSE	355,776	28,275	350,372	5,404	98%	5,404
<b>TOTAL INDIRECT EXPENSES:</b>	<b>1,886,393</b>	<b>149,876</b>	<b>1,751,613</b>	<b>134,780</b>	<b>93%</b>	<b>169,516</b>
<b>TOTAL ALL EXPENSES:</b>	<b>1,886,393</b>	<b>149,876</b>	<b>1,751,613</b>	<b>134,780</b>	<b>93%</b>	<b>169,516</b>
<b>NET INCOME (LOSS):</b>	<b>(1,886,393)</b>	<b>(149,876)</b>	<b>(1,751,613)</b>	<b>(134,780)</b>	<b>93%</b>	<b>134,780</b>

**Washington State Bar Association**  
Statement of Activities  
For the Period from September 1, 2022 to September 30, 2022  
**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>VOLUNTEER ENGAGEMENT</b>						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
VOLUNTEER SUPPORT	43,500	-	-	43,500	0%	43,500
STAFF MEMBERSHIP DUES	350	-	856	(506)	244%	(506)
STAFF CONFERENCE & TRAINING	2,500	-	1,090	1,410	44%	1,410
ABA DELEGATES	4,800	118	5,828	(1,028)	121%	(1,028)
<b>TOTAL DIRECT EXPENSES:</b>	<b>51,150</b>	<b>118</b>	<b>7,773</b>	<b>43,377</b>	<b>15%</b>	<b>43,377</b>
INDIRECT EXPENSES:						
SALARY EXPENSE (0.60 FTE)	57,186	4,746	56,934	252	100%	252
BENEFITS EXPENSE	18,937	2,231	19,270	(333)	102%	(333)
OTHER INDIRECT EXPENSE	17,675	1,284	15,903	1,772	90%	1,772
<b>TOTAL INDIRECT EXPENSES:</b>	<b>93,798</b>	<b>8,261</b>	<b>92,108</b>	<b>1,691</b>	<b>98%</b>	<b>1,691</b>
<b>TOTAL ALL EXPENSES:</b>	<b>144,948</b>	<b>8,379</b>	<b>99,881</b>	<b>45,068</b>	<b>69%</b>	<b>1,691</b>
<b>NET INCOME (LOSS):</b>	<b>(144,948)</b>	<b>(8,379)</b>	<b>(99,881)</b>	<b>(45,068)</b>	<b>69%</b>	<b>45,068</b>

**Washington State Bar Association**  
Statement of Activities  
For the Period from September 1, 2022 to September 30, 2022  
**100% OF YEAR COMPLETE**

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
<b>INDIRECT EXPENSES:</b>						
SALARIES	12,186,114	991,315	11,972,795	213,319	98%	213,319
TEMPORARY SALARIES	387,465	21,458	363,669	23,796	94%	23,796
CAPITAL LABOR & OVERHEAD	(285,000)	(39,771)	(267,632)	(17,368)	94%	17,368
EMPLOYEE ASSISTANCE PLAN	4,800	-	4,800	-	100%	-
EMPLOYEE SERVICE AWARDS	1,840	570	1,655	185	90%	185
FICA (EMPLOYER PORTION)	805,818	74,856	915,303	(109,485)	114%	(109,485)
L&I INSURANCE	49,414	13,580	65,681	(16,266)	133%	(16,266)
WA STATE FAMILY MEDICAL LEAVE (EMPLOYER PORTION)	17,337	1,586	18,724	(1,387)	108%	(1,387)
MEDICAL (EMPLOYER PORTION)	1,603,294	254,890	1,652,191	(48,897)	103%	(48,897)
RETIREMENT (EMPLOYER PORTION)	1,233,481	103,681	1,203,504	29,977	98%	29,977
TRANSPORTATION ALLOWANCE	47,733	7,075	51,168	(3,435)	107%	(3,435)
UNEMPLOYMENT INSURANCE	70,000	4,242	74,734	(4,734)	107%	(4,734)
<b>TOTAL SALARY &amp; BENEFITS EXPENSE:</b>	<b>16,122,296</b>	<b>1,433,481</b>	<b>16,056,592</b>	<b>65,704</b>	<b>100%</b>	<b>100,440</b>
WORKPLACE BENEFITS	45,000	3,938	33,394	11,605	74%	11,605
HUMAN RESOURCES POOLED EXP	99,058	5,867	75,425	23,632	76%	23,632
MEETING SUPPORT EXPENSES	5,000	342	5,182	(182)	104%	(182)
RENT	2,029,301	153,996	2,001,901	27,400	99%	27,400
PERSONAL PROP TAXES-WSBA	6,466	472	5,832	635	90%	635
FURNITURE, MAINT, LH IMP	16,719	827	19,729	(3,011)	118%	(3,011)
OFFICE SUPPLIES & EQUIPMENT	12,741	4,212	19,752	(7,011)	155%	(7,011)
FURN & OFFICE EQUIP DEPRECIATION	43,009	5,134	53,757	(10,748)	125%	(10,748)
COMPUTER HARDWARE DEPRECIATION	24,114	3,937	36,255	(12,141)	150%	(12,141)
COMPUTER SOFTWARE DEPRECIATION	80,904	8,302	99,934	(19,030)	124%	(19,030)
INSURANCE	238,839	22,025	254,713	(15,874)	107%	(15,874)
WORK HOME FURNITURE & EQUIP	62,658	15,683	43,021	19,637	69%	19,637
PROFESSIONAL FEES-AUDIT	40,000	(3,000)	30,000	10,000	75%	10,000
PROFESSIONAL FEES-LEGAL	250,000	15,036	135,866	114,134	54%	114,134
TELEPHONE & INTERNET	21,600	3,120	14,437	7,163	67%	7,163
POSTAGE - GENERAL	24,000	1,985	17,215	6,785	72%	6,785
RECORDS STORAGE	30,000	3,682	27,648	2,351	92%	2,351
BANK FEES	48,000	2,981	46,531	1,469	97%	1,469
PRODUCTION MAINTENANCE & SUPPLIES	16,692	3,166	10,650	6,042	64%	6,042
COMPUTER POOLED EXPENSES	942,450	53,637	852,470	89,980	90%	89,980
<b>TOTAL OTHER INDIRECT EXPENSES:</b>	<b>4,036,551</b>	<b>305,341</b>	<b>3,783,713</b>	<b>252,838</b>	<b>94%</b>	<b>252,838</b>
<b>TOTAL INDIRECT EXPENSES:</b>	<b>20,158,848</b>	<b>1,738,823</b>	<b>19,840,305</b>	<b>318,542</b>	<b>98%</b>	<b>318,542</b>

**Washington State Bar Association**  
Statement of Activities  
For the Period from September 1, 2022 to September 30, 2022  
**100% OF YEAR COMPLETE**

<b>SUMMARY PAGE</b>	<b>FISCAL 2022 REFORECAST</b>	<b>CURRENT MONTH</b>	<b>YEAR TO DATE</b>	<b>REMAINING BALANCE</b>
ACCESS TO JUSTICE	(201,369)	(23,529)	(181,745)	(19,624)
ADMINISTRATION	(1,028,371)	(62,704)	(931,909)	(96,462)
ADMISSIONS/BAR EXAM	19,267	(90,978)	(10,992)	30,259
ADVANCEMENT FTE	(346,495)	(29,953)	(343,719)	(2,776)
BAR NEWS	(84,322)	16,925	4,674	(88,996)
BOARD OF GOVERNORS	(510,064)	(96,039)	(497,512)	(12,552)
CLE - PRODUCTS	1,041,058	17,781	1,095,493	(54,436)
CLE - SEMINARS	(268,958)	(256,773)	(573,385)	304,427
CLIENT PROTECTION FUND	157,238	(499,646)	17,256	139,983
CHARACTER & FITNESS BOARD	(68,720)	(3,514)	(22,004)	(46,717)
COMMUNICATIONS	(722,688)	(104,760)	(708,755)	(13,933)
COMMUNICATIONS FTE	(225,526)	(19,682)	(222,579)	(2,947)
DESKBOOKS	(115,525)	(5,258)	(128,851)	13,327
DISCIPLINE	(5,757,549)	(513,798)	(5,637,881)	(119,668)
DIVERSITY	(297,420)	(31,980)	(181,278)	(116,142)
EJD FTE	(191,583)	(18,286)	(210,059)	18,476
FOUNDATION	(132,430)	(13,752)	(127,662)	(4,768)
HUMAN RESOURCES	(459,945)	(52,680)	(481,345)	21,400
LAW CLERK PROGRAM	90,828	(9,481)	78,220	12,608
LEGISLATIVE	(253,110)	(13,927)	(225,920)	(27,191)
LEGAL LUNCHBOX	(6,236)	(2,999)	1,547	(7,783)
LICENSE FEES	16,512,089	1,405,401	16,857,886	(345,798)
LICENSING AND MEMBERSHIP	(212,549)	(17,462)	(156,557)	(55,992)
LIMITED LICENSE LEGAL TECHNICIAN	(66,052)	(5,643)	(66,406)	354
LIMITED PRACTICE OFFICERS	99,307	2,730	102,805	(3,498)
MANDATORY CLE ADMINISTRATION	694,577	20,275	778,406	(83,829)
MEMBER WELLNESS PROGRAM	(201,441)	(14,304)	(177,295)	(24,147)
MINI CLE	(106,712)	(9,633)	(99,382)	(7,330)
MEMBER SERVICES & ENGAGEMENT	(419,570)	(97,661)	(395,182)	(24,388)
NEW MEMBER EDUCATION	(556)	(1,590)	(39,858)	39,302
OFFICE OF GENERAL COUNSEL	(979,310)	(86,355)	(973,973)	(5,337)
OFFICE OF THE EXECUTIVE DIRECTOR	(596,047)	(33,575)	(511,510)	(84,537)
OGC-DISCIPLINARY BOARD	(308,536)	(24,590)	(258,656)	(49,880)
PRACTICE OF LAW BOARD	(79,261)	(5,914)	(70,384)	(8,877)
PRACTICE MANAGEMENT ASSISTANCE	(40,174)	59,163	(13,099)	(27,075)
PROFESSIONAL RESPONSIBILITY PROGRAM	(280,465)	(20,606)	(258,987)	(21,478)
PUBLIC SERVICE PROGRAMS	(266,355)	(108,741)	(268,468)	2,114
PUBLICATION & DESIGN SERVICES	(113,340)	(9,829)	(110,892)	(2,448)
REGULATORY SERVICES FTE	(515,967)	(43,022)	(493,218)	(22,749)
SECTIONS ADMINISTRATION	(4,886)	(112,371)	2,221	(7,107)
SECTIONS OPERATIONS	(262,000)	150,808	293,807	(555,806)
SERVICE CENTER	(672,523)	(60,212)	(655,946)	(16,577)
TECHNOLOGY	(1,886,393)	(149,876)	(1,751,613)	(134,780)
VOLUNTEER EDUCATION	(144,948)	(8,379)	(99,881)	(45,068)
INDIRECT EXPENSES	20,158,848	1,738,823	19,840,305	318,542
<b>TOTAL OF ALL</b>	<b>(20,945,815)</b>	<b>(752,402)</b>	<b>(22,185,719)</b>	<b>1,239,903</b>
<b>NET INCOME (LOSS)</b>	<b>786,968</b>	<b>(986,420)</b>	<b>2,345,413</b>	<b>(1,558,446)</b>



**Washington State Bar Association  
Analysis of Cash Investments  
As of September 30, 2022**

**Checking & Savings Accounts**

**General Fund**

**Checking**

<b><u>Bank</u></b>	<b><u>Account</u></b>	<b><u>Amount</u></b>
Wells Fargo	General	\$ 1,137,361

Total

<b><u>Investments</u></b>	<b><u>Rate</u></b>	<b><u>Amount</u></b>
Wells Fargo Money Market	0.32%	\$ 6,758,063
UBS Financial Money Market	0.11%	\$ 1,085,080
Morgan Stanley Money Market	0.20%	\$ 3,377,476
Merrill Lynch Money Market	0.19%	\$ 1,993,673
CDs/Treasuries	see list	\$ 1,992,752

**General Fund Total \$ 16,344,405**

**Client Protection Fund**

**Checking**

<b><u>Bank</u></b>	<b><u>Amount</u></b>
Wells Fargo	\$ 376,657

<b><u>Investments</u></b>	<b><u>Rate</u></b>	<b><u>Amount</u></b>
Wells Fargo Money Market	0.21%	\$ 4,433,256
Morgan Stanley Money Market	0.17%	\$ 107,479

**Client Protection Fund Total \$ 4,917,393**

**Grand Total Cash & Investments \$ 21,261,798**

**Washington State Bar Association  
Analysis of Cash Investments  
As of September 30, 2022**

**Investments as of 9/30/22**

**General Fund**

<u>Bank</u>	<u>Yield</u>	<u>Term</u>	<u>Trade Date</u>	<u>Settle Date</u>	<u>Maturity Date</u>	<u>Amount</u>
US Treasury Bill	2.30%	3m	7/28/2022	7/29/2022	11/3/2022	248,481.01
Customers Bank Phoenixville PA CD	2.80%	3m	9/7/2022	9/15/2022	12/15/2022	250,000.00
US Treasury Bill	2.90%	4m	9/7/2022	9/13/2022	1/10/2023	247,653.06
Silvergate Bank CD	2.90%	4m	9/7/2022	9/14/2022	1/17/2023	250,000.00
US Treasury Bill	2.75%	6m	7/28/2022	7/28/2022	2/3/2023	246,617.83
Bank Baroda NY CD	3.00%	5m	9/7/2022	9/16/2022	2/16/2023	250,000.00
Beal Bank USA CD	2.80%	9m	7/28/2022	8/10/2022	5/10/2023	250,000.00
State Bank of India NY CD	3.10%	1y	7/28/2022	8/8/2022	8/8/2023	250,000.00

**Total            1,992,751.90**

# WASHINGTON STATE BAR ASSOCIATION

## WSBA MISSION

The Washington State Bar Association’s mission is to serve the public and the members of the Bar, to ensure the integrity of the legal profession, and to champion justice.

## WSBA GUIDING PRINCIPLES

The WSBA will operate a well-managed association that supports its members and advances and promotes:

- **Access to the justice system.**  
*Focus: Provide training and leverage community partnerships in order to enhance a culture of service for legal professionals to give back to their communities, with a particular focus on services to underserved low and moderate income people.*
- **Diversity, equality, and cultural understanding throughout the legal community.**  
*Focus: Work to understand the lay of the land of our legal community and provide tools to members and employers in order to enhance the retention of minority legal professionals in our community.*
- **The public’s understanding of the rule of law and its confidence in the legal system.**  
*Focus: Educate youth and adult audiences about the importance of the three branches of government and how they work together.*
- **A fair and impartial judiciary.**
- **The ethics, civility, professionalism, and competence of the Bar.**

## MISSION FOCUS AREAS

### Ensuring Competent and Qualified Legal Professionals

- Cradle to Grave
- Regulation and Assistance

### Promoting the Role of Legal Professionals in Society

- Service
- Professionalism

## PROGRAM CRITERIA

- Does the Program further either or both of WSBA’s mission-focus areas?
- Does WSBA have the competency to operate the Program?
- As the mandatory bar, how is WSBA uniquely positioned to successfully operate the Program?
- Is statewide leadership required in order to achieve the mission of the Program?
- Does the Program’s design optimize the expenditure of WSBA resources devoted to the Program, including the balance between volunteer and staff involvement, the number of people served, the cost per person, etc?

## 2016 – 2018 STRATEGIC GOALS

- **Equip members with skills for the changing profession**
- **Promote equitable conditions for members from historically marginalized or underrepresented backgrounds to enter, stay and thrive in the profession**
- **Explore and pursue regulatory innovation and advocate to enhance the public’s access to legal services**

**GR 12**  
**REGULATION OF THE PRACTICE OF LAW**

The Washington Supreme Court has inherent and plenary authority to regulate the practice of law in Washington. The legal profession serves clients, courts, and the public, and has special responsibilities for the quality of justice administered in our legal system. The Court ensures the integrity of the legal profession and protects the public by adopting rules for the regulation of the practice of law and actively supervising persons and entities acting under the Supreme Court's authority.

*[Adopted effective September 1, 2017.]*

**GR 12.1**  
**REGULATORY OBJECTIVES**

Legal services providers must be regulated in the public interest. In regulating the practice of law in Washington, the Washington Supreme Court's objectives include: protection of the public; advancement of the administration of justice and the rule of law; meaningful access to justice and information about the law, legal issues, and the civil and criminal justice systems;

- (a) transparency regarding the nature and scope of legal services To be provided, the credentials of those who provide them, and the availability of regulatory protections;
- (b) delivery of affordable and accessible legal services;
- (c) efficient, competent, and ethical delivery of legal services;
- (d) protection of privileged and confidential information;
- (e) independence of professional judgment;
- (f) Accessible civil remedies for negligence and breach of other duties owed, disciplinary sanctions for misconduct, and advancement of appropriate preventive or wellness programs;
- (g) Diversity and inclusion among legal services providers and freedom from discrimination for those receiving legal services and in the justice system.

*[Adopted effective September 1, 2017.]*

**GR 12.2**  
**WASHINGTON STATE BAR ASSOCIATION: PURPOSES, AUTHORIZED  
ACTIVITIES, AND PROHIBITED ACTIVITIES**

In the exercise of its inherent and plenary authority to regulate the practice of law in Washington, the Supreme Court authorizes and supervises the Washington State Bar Association's activities. The Washington State Bar Association carries out the administrative responsibilities and functions expressly delegated to it by this rule and other Supreme Court rules and orders enacted or adopted to regulate the practice of law, including the purposes and authorized activities set forth below.

- (a) Purposes: In General. In general, the Washington State Bar Association strives to:

- (1) Promote independence of the judiciary and the legal profession.
- (2) Promote an effective legal system, accessible to all.
- (3) Provide services to its members and the public.
- (4) Foster and maintain high standards of competence, professionalism, and ethics among its members.
- (5) Foster collegiality among its members and goodwill between the legal profession and the public.
- (6) Promote diversity and equality in the courts and the legal profession.
- (7) Administer admission, regulation, and discipline of its members in a manner that protects the public and respects the rights of the applicant or member.
- (8) Administer programs of legal education.
- (9) Promote understanding of and respect for our legal system and the law.
- (10) Operate a well-managed and financially sound association, with a positive work environment for its employees.
- (11) Serve as a statewide voice to the public and to the branches of government on matters relating to these purposes and the activities of the association and the legal profession.

(b) Specific Activities Authorized. In pursuit of these purposes, the Washington State Bar Association may:

- (1) Sponsor and maintain committees and sections, whose activities further these purposes;
- (2) Support the judiciary in maintaining the integrity and fiscal stability of an independent and effective judicial system;
- (3) Provide periodic reviews and recommendations concerning court rules and procedures;
- (4) Administer examinations and review applicants' character and fitness to practice law;
- (5) Inform and advise its members regarding their ethical obligations;
- (6) Administer an effective system of discipline of its members, including receiving and investigating complaints of misconduct by legal professionals, taking and recommending appropriate punitive and remedial measures, and diverting less serious misconduct to alternatives outside the formal discipline system;
- (7) Maintain a program, pursuant to court rule, requiring members to submit fee disputes to arbitration;
- (8) Maintain a program for mediation of disputes between members and others;
- (9) Maintain a program for legal professional practice assistance;
- (10) Sponsor, conduct, and assist in producing programs and products of continuing legal education;

- (11) Maintain a system for accrediting programs of continuing legal education;
- (12) Conduct examinations of legal professionals' trust accounts;
- (13) Maintain a fund for client protection in accordance with the Admission and Practice Rules;
- (14) Maintain a program for the aid and rehabilitation of impaired members;
- (15) Disseminate information about the organization's activities, interests, and positions;
- (16) Monitor, report on, and advise public officials about matters of interest to the organization and the legal profession;
- (17) Maintain a legislative presence to inform members of new and proposed laws and to inform public officials about the organization's positions and concerns;
- (18) Encourage public service by members and support programs providing legal services to those in need;
- (19) Maintain and foster programs of public information and education about the law and the legal system;
- (20) Provide, sponsor, and participate in services to its members;
- (21) Hire and retain employees to facilitate and support its mission, purposes, and activities, including in the organization's discretion, authorizing collective bargaining;
- (22) Establish the amount of all license, application, investigation, and other related fees, as well as charges for services provided by the Washington State Bar Association, and collect, allocate, invest, and disburse funds so that its mission, purposes, and activities may be effectively and efficiently discharged. The amount of any license fee is subject to review by the Supreme Court for reasonableness and may be modified by order of the Court if the Court determines that it is not reasonable;

(23) Administer Supreme-Court-created boards in accordance with General Rule 12.3.

(c) Activities Not Authorized. The Washington State Bar Association will not:

- (1) Take positions on issues concerning the politics or social positions of foreign nations;
- (2) Take positions on political or social issues which do not relate to or affect the practice of law or the administration of justice; or
- (3) Support or oppose, in an election, candidates for public office.

*[Adopted effective July 17, 1987; amended effective December 10, 1993; September 1, 1997; September 1, 2007; September 1, 2013; September 1, 2017.]*

**GR 12.3**  
**WASHINGTON STATE BAR ASSOCIATION ADMINISTRATION**  
**OF SUPREME COURT-CREATED BOARDS AND COMMITTEES**

The Supreme Court has delegated to the Washington State Bar Association the authority and responsibility to administer certain boards and committees established by court rule or order. This delegation of authority includes providing and managing staff, overseeing the boards and committees to monitor their compliance with the rules and orders that authorize and regulate them, paying expenses reasonably and necessarily incurred pursuant to a budget approved by the Board of Governors, performing other functions and taking other actions as provided in court rule or order or delegated by the Supreme Court, or taking other actions as are necessary and proper to enable the board or committee to carry out its duties or functions.

*[Adopted effective September 1, 2007; amended effective September 1, 2017.]*

**GR 12.4**  
**WASHINGTON STATE BAR ASSOCIATION ACCESS TO**  
**RECORDS**

(a) Policy and Purpose. It is the policy of the Washington State Bar Association to facilitate access to Bar records. A presumption of public access exists for Bar records, but public access to Bar records is not absolute and shall be consistent with reasonable expectations of personal privacy, restrictions in statutes, restrictions in court rules, or as provided in court orders or protective orders issued under court rules. Access shall not unduly burden the business of the Bar.

(b) Scope. This rule governs the right of public access to Bar records. This rule applies to the Washington State Bar Association and its subgroups operated by the Bar including the Board of Governors, committees, task forces, commissions, boards, offices, councils, divisions, sections, and departments. This rule also applies to boards and committees under GR 12.3 administered by the Bar. A person or entity entrusted by the Bar with the storage and maintenance of Bar records is not subject to this rule and may not respond to a request for access to Bar records, absent express written authority from the Bar or separate authority in rule or statute to grant access to the documents.

(c) Definitions.

(1) "Access" means the ability to view or obtain a copy of a Bar record.

(2) "Bar record" means any writing containing information relating to the conduct of any Bar function prepared, owned, used, or retained by the Bar regardless of physical form or characteristics. Bar records include only those records in the possession of the Bar and its staff or stored under Bar ownership and control in facilities or servers. Records solely in the possession of hearing officers, non-Bar staff members of boards, committees, task forces, commissions, sections, councils, or divisions that were prepared by the hearing officers or the members and in their sole possession, including private notes and working papers, are not Bar records and are not subject to public access under this rule. Nothing in this rule requires the Bar to create a record that is not currently in possession of the Bar at the time of the request.

(3) "Writing" means handwriting, typewriting, printing, photostating, photographing, and every other means of recording any form of communication or representation in paper, digital, or other format.

(d) Bar Records--Right of Access.

(1) The Bar shall make available for inspection and copying all Bar records, unless the record falls within the specific exemptions of this rule, or any other state statute (including the Public Records Act, chapter 42.56 RCW) or federal statute or rule as they would be applied to a public agency, or is made confidential by the Rules of Professional Conduct, the Rules for Enforcement of Lawyer Conduct, the Admission to Practice Rules and associated regulations, the Rules for Enforcement of Limited Practice Officer Conduct, General Rule 25, court orders or protective orders issued under those rules, or any other state or federal statute or rule. To the extent required to prevent an unreasonable invasion of personal privacy interests or threat to safety or by the above-referenced rules, statutes, or orders, the Bar shall delete identifying details in a manner consistent with those rules, statutes, or orders when it makes available or publishes any Bar record; however, in each case, the justification for the deletion shall be explained in writing.

(2) In addition to exemptions referenced above, the following categories of Bar records are exempt from public access except as may expressly be made public by court rule:

(A) Records of the personnel committee, and personal information in Bar records for employees, appointees, members, or volunteers of the Bar to the extent that disclosure would violate their right to privacy, including home contact information (unless such information is their address of record), Social Security numbers, driver's license numbers, identification or security photographs held in Bar records, and personal data including ethnicity, race, disability status, gender, and sexual orientation. Membership class and status, bar number, dates of admission or licensing, addresses of record, and business telephone numbers, facsimile numbers, and electronic mail addresses (unless there has been a request that electronic mail addresses not be made public) shall not be exempt, provided that any such information shall be exempt if the Executive Director approves the confidentiality of that information for reasons of personal security or other compelling reason, which approval must be reviewed annually.

(B) Specific information and records regarding

(i) internal policies, guidelines, procedures, or techniques, the disclosure of which would reasonably be expected to compromise the conduct of disciplinary or regulatory functions, investigations, or examinations;

(ii) application, investigation, and hearing or proceeding records relating to lawyer, Limited Practice Officer, or Limited License Legal Technician admissions, licensing, or discipline, or that relate to the work of ELC 2.5 hearing officers, the Board of Bar Examiners, the Character and Fitness Board, the Law Clerk Board, the Limited Practice Board, the MCLE Board, the Limited License Legal Technician Board, the Practice of Law Board, or the Disciplinary Board in conducting investigations, hearings or proceedings; and

(iii) the work of the Judicial Recommendation Committee and the Hearing Officer selection panel, unless such records are expressly categorized as public information by court rule.

(C) Valuable formulae, designs, drawings, computer source code or object code, and research data created or obtained by the Bar.

(D) Information regarding the infrastructure, integrity, and security of computer and telecommunication networks, databases, and systems.



(E) Applications for licensure by the Bar and annual licensing forms and related records, including applications for license fee hardship waivers and any decision or determinations on the hardship waiver applications.

(F) Requests by members for ethics opinions to the extent that they contain information identifying the member or a party to the inquiry.

Information covered by exemptions will be redacted from the specific records sought. Statistical information not descriptive of any readily identifiable person or persons may be disclosed.

### (3) Persons Who Are Subjects of Records.

(A) Unless otherwise required or prohibited by law, the Bar has the option to give notice of any records request to any member or third party whose records would be included in the Bar's response.

(B) Any person who is named in a record, or to whom a record specifically pertains, may present information opposing the disclosure to the applicable decision maker.

(C) If the Bar decides to allow access to a requested record, a person who is named in that record, or to whom the records specifically pertains, has a right to initiate review or to participate as a party to any review initiated by a requester. The deadlines that apply to a requester apply as well to a person who is a subject of a record.

### (e) Bar Records--Procedures for Access.

(1) General Procedures. The Bar Executive Director shall appoint a Bar staff member to serve as the public records officer to whom all records requests shall be submitted. Records requests must be in writing and delivered to the Bar public records officer, who shall respond to such requests within 30 days of receipt. The Washington State Bar Association must implement this rule and adopt and publish on its website the public records officer's work mailing address, telephone number, fax number, and e-mail address, and the procedures and fee schedules for accepting and responding to records requests by the effective date of this rule. The Bar shall acknowledge receipt of the request within 14 days of receipt, and shall communicate with the requester as necessary to clarify any ambiguities as to the records being requested. Records requests shall not be directed to other Bar staff or to volunteers serving on boards, committees, task forces, commissions, sections, councils, or divisions.

### (2) Charging of Fees.

(A) A fee may not be charged to view Bar records.

(B) A fee may be charged for the photocopying or scanning of Bar records according to the fee schedule established by the Bar and published on its web site.

(C) A fee not to exceed \$30 per hour may be charged for research services required to fulfill a request taking longer than one hour. The fee shall be assessed from the second hour onward.

(f) Extraordinary Requests Limited by Resource Constraints. If a particular request is of a magnitude or burden on resources that the Bar cannot fully comply within 30 days due to constraints on time, resources, and personnel, the Bar shall communicate this information to the requester along with a good faith estimate of the time needed to complete the Bar's response. The Bar must attempt to reach

agreement with the requester as to narrowing the request to a more manageable scope and as to a timeframe for the Bar's response, which may include a schedule of installment responses. If the Bar and requester are unable to reach agreement, the Bar shall respond to the extent practicable, clarify how and why the response differs from the request, and inform the requester that it has completed its response.

(g) Denials. Denials must be in writing and shall identify the applicable exemptions or other bases for denial as well as a written summary of the procedures under which the requesting party may seek further review.

(h) Review of Records Decisions.

(1) Internal Review. A person who objects to a record decision or other action by the Bar's public records officer may request review by the Bar's Executive Director.

(A) A record requester's petition for internal review must be submitted within 90 days of the Bar's public records officer's decision, on such form as the Bar shall designate and make available.

(B) The review proceeding is informal, summary, and on the record.

(C) The review proceeding shall be held within five working days. If that is not reasonably possible, then within five working days the review shall be scheduled for the earliest practical date.

(2) External Review. A person who objects to a records review decision by the Bar's Executive Director may request review by the Records Request Appeals Officer (RRAO) for the Bar.

(A) The requesting party's request for review of the Executive Director's decision must be deposited in the mail and postmarked or delivered to the Bar not later than 30 days after the issuance of the decision, and must be on such form as the Bar shall designate and make available.

(B) The review will be informal and summary, but in the sole discretion of the RRAO may include the submission of briefs no more than 20 pages long and of oral arguments no more than 15 minutes long.

(C) Decisions of the RRAO are final unless, within 30 days of the issuance of the decision, a request for discretionary review of the decision is filed with the Supreme Court. If review is granted, review is conducted by the Chief Justice of the Washington Supreme Court or his or her designee in accordance with procedures established by the Supreme Court. A designee of the Chief Justice shall be a current or former elected judge. The review proceeding shall be on the record, without additional briefing or argument unless such is ordered by the Chief Justice or his or her designee.

(D) The RRAO shall be appointed by the Board of Governors. The Bar may reimburse the RRAO for all necessary and reasonable expenses incurred in the completion of these duties, and may provide compensation for the time necessary for these reviews at a level established by the Board of Governors.

(i) Monetary Awards Not Allowed. Attorney fees, costs, civil penalties, or fines may not be awarded under this rule.

(j) Effective Date of Rule.

(1) This rule goes into effect on July 1, 2014, and applies to records that are created on or after that date.

(2) Public access to records that are created before that date are to be analyzed according to other court rules, applicable statutes, and the common law balancing test; the Public Records Act, chapter 42.56 RCW, does not apply to such Bar records, but it may be used for nonbinding guidance.

*[Adopted effective July 1, 2014; amended effective September 1, 2017.]*

**GR 12.5  
IMMUNITY**

All boards, committees, or other entities, and their members and personnel, and all personnel and employees of the Washington State Bar Association, acting on behalf of the Supreme Court under the Admission and Practice Rules, the Rules for Enforcement of Lawyer Conduct, or the disciplinary rules for limited practice officers and limited license legal technicians, shall enjoy quasi-judicial immunity if the Supreme Court would have immunity in performing the same functions.

*[Adopted effective January 2, 2008; amended effective September 1, 2017.]*



# WSBA Board of Governors CONGRESSIONAL DISTRICT MAP



**Dan Clark**  
President



**Hunter Abell**  
President-Elect



**Brian Tollefson**  
Immediate Past  
President



**Francis Adewale**  
Treasurer



**Terra Nevitt**  
Executive Director  
& Secretary

2022-2023



**Sunitha Anjilvel**  
Governor District 1



**Kari Petrusek**  
Governor District 2



**Brett Purtzer**  
Governor District 6



**Matthew Dresden**  
Governor District 7-North



**Serena Sayani**  
Governor District 7-South



**Erik Kaeding**  
Governor District 8



**Kevin Fay**  
Governor District 9



**Nam Nguyen**  
Governor District 10



**Lauren Boyd**  
Governor District 3



**Francis Adewale**  
Governor District 5



**Mary Rathbone**  
Governor District 4



**Jordan Couch**  
Governor At-Large



**Alec Stephens**  
Governor At-Large



**Brent Williams-Ruth**  
Governor At-Large

## **BASIC CHARACTERISTICS OF MOTIONS**

*From: The Complete Idiot's Guide to Robert's Rules  
The Guerilla Guide to Robert's Rules*

MOTION	PURPOSE	INTERRUPT SPEAKER?	SECOND NEEDED?	DEBATABLE?	AMENDABLE?	VOTE NEEDED
1. Fix the time to which to adjourn	Sets the time for a continued meeting	No	Yes	No <sup>1</sup>	Yes	Majority
2. Adjourn	Closes the meeting	No	Yes	No	No	Majority
3. Recess	Establishes a brief break	No	Yes	No <sup>2</sup>	Yes	Majority
4. Raise a Question of Privilege	Asks urgent question regarding to rights	Yes	No	No	No	Rules by Chair
5. Call for orders of the day	Requires that the meeting follow the agenda	Yes	No	No	No	One member
6. Lay on the table	Puts the motion aside for later consideration	No	Yes	No	No	Majority
7. Previous question	Ends debate and moves directly to the vote	No	Yes	No	No	Two-thirds
8. Limit or extend limits of debate	Changes the debate limits	No	Yes	No	Yes	Two-thirds
9. Postpone to a certain time	Puts off the motion to a specific time	No	Yes	Yes	Yes	Majority <sup>3</sup>
10. Commit or refer	Refers the motion to a committee	No	Yes	Yes	Yes	Majority
11. Amend an amendment (secondary amendment)	Proposes a change to an amendments	No	Yes	Yes <sup>4</sup>	No	Majority
12. Amend a motion or resolution (primary amendment)	Proposes a change to a main motion	No	Yes	Yes <sup>4</sup>	Yes	Majority
13. Postpone indefinitely	Kills the motion	No	Yes	Yes	No	Majority
14. Main motion	Brings business before the assembly	No	Yes	Yes	Yes	Majority

*1 Is debatable when another meeting is scheduled for the same or next day, or if the motion is made while no question is pending*

*2 Unless no question is pending*

*3 Majority, unless it makes question a special order*

*4 If the motion it is being applied to is debatable*



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## Discussion Protocols Board of Governors Meetings

### Philosophical Statement:

“We take serious our representational responsibilities and will try to inform ourselves on the subject matter before us by contact with constituents, stakeholders, WSBA staff and committees when possible and appropriate. In all deliberations and actions we will be courageous and keep in mind the need to represent and lead our membership and safeguard the public. In our actions, we will be mindful of both the call to action and the constraints placed upon the WSBA by GR 12 and other standards.”

### Governor’s Commitments:

1. Tackle the problems presented; don’t make up new ones.
2. Keep perspective on long-term goals.
3. Actively listen to understand the issues and perspective of others before making the final decision or lobbying for an absolute.
4. Respect the speaker, the input and the Board’s decision.
5. Collect your thoughts and speak to the point – sparingly!
6. Foster interpersonal relationships between Board members outside Board events.
7. Listen and be courteous to speakers.
8. Speak only if you can shed light on the subject, don’t be repetitive.
9. Consider, respect and trust committee work but exercise the Board’s obligation to establish policy and insure that the committee work is consistent with that policy and the Board’s responsibility to the WSBA’s mission.
10. Seek the best decision through quality discussion and ample time (listen, don’t make assumptions, avoid sidebars, speak frankly, allow time before and during meetings to discuss important matters).
11. Don’t repeat points already made.
12. Everyone should have a chance to weigh in on discussion topics before persons are given a second opportunity.
13. No governor should commit the board to actions, opinions, or projects without consultation with the whole Board.
14. Use caution with e-mail: it can be a useful tool for debating, but e-mail is not confidential and does not easily involve all interests.
15. Maintain the strict confidentiality of executive session discussions and matters.



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## **BOARD OF GOVERNORS**

### **WSBA VALUES**

Through a collaborative process, the WSBA Board of Governors and Staff have identified these core values that shall be considered by the Board, Staff, and WSBA volunteers (collectively, the “WSBA Community”) in all that we do.

To serve the public and our members and to promote justice, the WSBA Community values the following:

- Trust and respect between and among Board, Staff, Volunteers, Members, and the public
- Open and effective communication
- Individual responsibility, initiative, and creativity
- Teamwork and cooperation
- Ethical and moral principles
- Quality customer-service, with member and public focus
- Confidentiality, where required
- Diversity and inclusion
- Organizational history, knowledge, and context
- Open exchanges of information





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## BOARD OF GOVERNORS

### GUIDING COMMUNICATION PRINCIPLES

In each communication, I will assume the good intent of my fellow colleagues; earnestly and actively listen; encourage the expression of and seek to affirm the value of their differing perspectives, even where I may disagree; share my ideas and thoughts with compassion, clarity, and where appropriate confidentiality; and commit myself to the unwavering recognition, appreciation, and celebration of the humanity, skills, and talents that each of my fellow colleagues bring in the spirit and effort to work for the mission of the WSBA. Therefore, I commit myself to operating with the following norms:

- ◆ I will treat each person with courtesy and respect, valuing each individual.
- ◆ I will strive to be nonjudgmental, open-minded, and receptive to the ideas of others.
- ◆ I will assume the good intent of others.
- ◆ I will speak in ways that encourage others to speak.
- ◆ I will respect others' time, workload, and priorities.
- ◆ I will aspire to be honest and open in all communications.
- ◆ I will aim for clarity; be complete, yet concise.
- ◆ I will practice "active" listening and ask questions if I don't understand.
- ◆ I will use the appropriate communication method (face-to-face, email, phone, voicemail) for the message and situation.
- ◆ When dealing with material of a sensitive or confidential nature, I will seek and confirm that there is mutual agreement to the ground rules of confidentiality at the outset of the communication.
- ◆ I will avoid triangulation and go directly to the person with whom I need to communicate. (If there is a problem, I will go to the source for resolution rather than discussing it with or complaining to others.)
- ◆ I will focus on reaching understanding and finding solutions to problems.
- ◆ I will be mindful of information that affects, or might be of interest or value to, others, and pass it along; err on the side of over-communication.
- ◆ I will maintain a sense of perspective and respectful humor.



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Anthony David Gipe  
President

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e-mail: [adgipeWSBA@gmail.com](mailto:adgipeWSBA@gmail.com)

November 2014

## BEST PRACTICES AND EXPECTATIONS

### ❖ Attributes of the Board

- Competence
- Respect
- Trust
- Commitment
- Humor

### ❖ Accountability by Individual Governors

- Assume Good Intent
- Participation/Preparation
- Communication
- Relevancy and Reporting

### ❖ Team of Professionals

- Foster an atmosphere of teamwork
  - Between Board Members
  - The Board with the Officers
  - The Board and Officers with the Staff
  - The Board, Officers, and Staff with the Volunteers
  
- We all have common loyalty to the success of WSBA

### ❖ Work Hard and Have Fun Doing It

*Working Together to Champion Justice*



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